

2010 Wireless Broadband Market Map

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Introduction

Welcome to the Wireless Broadband Market Map.

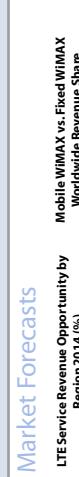
- How wireless broadband is evolving.
- The component parts of WiMAX, WiFi, LTE and 3GPP and how the different delivery methods can be used for accessing the internet.
- The various go-to-market models for delivering wireless internet to customers.

Key Enablers to Market Growth

The number of people accessing the internet on-the-go is continuing to grow:

- EU's data market grew by 40% last year to 7 billion Euros (GSMA).
- Sales of mobile data cards are forecast to nearly quadruple between 2007 and 2011, when they will reach \$2.9 billion (Infornetics Research).
- The growth of different technologies is going to vary throughout the EMEA region:
 - WiMAX is going to be more widely adopted in Africa than in Europe because of the lack of existing infrastructure, 60% of WiMax deployments are in emerging markets (Pyramid Research).
 - With 3G coming to Africa, it is thought that it will be many people's first experience of the internet.
- Some in the market see a battle taking place between WiMAX and LTE, in reality they are not going to be competing technologies but complementary.
- Worldwide fixed and mobile WiMAX equipment revenue topped \$402 million in 2Q08, up 3% from 1Q08. (Infornetics Research).
- It is likely that dual-mode WiMAX/LTE devices will appear once the LTE standards are finalised. This will further encourage a convergence of the 4G technologies.

Market Forecasts



WiMAX DSL Replacement

- Global WiMAX service revenues as DSL replacement technology will grow to over \$20bn per annum by 2013.
- The top WiMAX regions for DSL substitution will be: the Far East, North America, Western Europe and Africa/Middle East.
- Around 12% of the forecast DSL subscriber base for 2013 will be replaced by WiMAX. (Jupiter Research)

LTE Revenue generation

- Revenues from LTE mobile broadband subscribers will exceed \$70 billion globally by 2014.
- LTE's main markets will be the developed nations of North America, Western Europe, the Far East and China, which together account for 90% of the market by 2014. (Jupiter Research)

LTE Infrastructure Investment

- By 2013 operators will spend over \$8.6 billion on LTE base station infrastructure alone.
- For operators that have already deployed 3G networks, LTE will be key CAPEX driver over the next five years. (ABI Research)

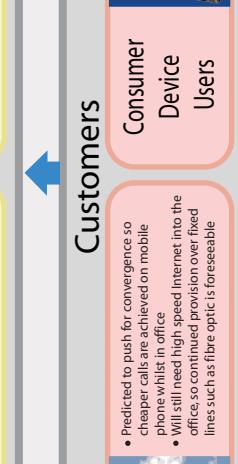
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Venture Success Criteria



Customers



Go To Market Business Models



Service Providers



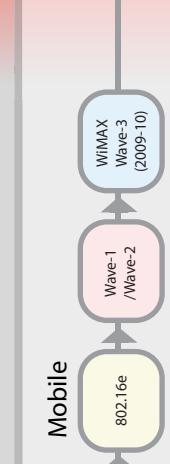
Revenue and Management



Content Delivery



Standardisation



Associations



Regulations



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