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The Future of Broadband: Fixed-Mobile Substitution

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Abstracts

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Much has been made of the opportunity for users and operators to “cut the cord”, do away with fixed networks, and pursue a mobile future. The opportunity certainly exists, with over 1 billion people expected to use mobile technologies as their primary form of Internet access in 2015. However, the extent of fixed-to-mobile substitution (FMS) will be heavily impacted by the current conditions in the broadband market. As such, FMS will only be viable in specific circumstances over the next five years. Emerging markets with no pre-existing fixed-line infrastructure offer the greatest potential for FMS, but affordability in these markets will be crucial. In developed markets, segmentation will be critical to FMS, and low-end users will be the largest target segment.

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