

Global mobile market outlook: 2009–14

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Abstracts

Global mobile connections are set to reach 6.49 billion in 2014, with revenues over \$1,000 billion. However, over the coming five years, strategic challenges and intense competition awaits operators in both developed and emerging markets. Those operators able to grasp the initiative will be best placed to benefit from the enormous figures involved in the mobile industry. This report provides Ovum's perspective on the market trends that will shape the mobile industry to 2014. It is intended as an accompaniment to the most recently published mobile forecasts (published 18 December 2009).

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Executive summary

In a nutshell

Key messages

Ovum view

Connections: growth in emerging markets more than masks recessionary pressures

Revenues: recession slows the global market, but not for long

Services: mobile broadband growth to drive spectrum and LTE focus, but voice to remain the 'killer app'

Strategy: LTE signals the transformation to an IP world

Connections

Recession makes minimal impact on global connections thanks to emerging markets

Developed market connections bear the brunt of the recession in 2009 despite data boom

A Western European market contracts for the first time

North American boom shows no sign of stopping

Developed Asia-Pacific markets march on

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Asia-Pacific remains the connections growth engine

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Middle East and Africa

Device market to rebound in 2010

Smartphone shipments will reach 514.6 million by 2014

Symbian and Windows Mobile to struggle, while Android continues to rise

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Economic downturn reduces spending into the future

Emerging market connection growth masks ARPU erosion

'Emerging maturity' impacts revenue growth

Data saves mature markets, but emerging markets will get in on the act too

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Spectrum to become increasingly important over the next five years

LTE brings new spectrum allocation and issues dealing with the old

Emerging markets go 3G

More competition, but who wins?

Mobile has a role in bridging the digital divide in emerging and developed markets

Net neutrality raises its head

The EU's focus on mobile continues, but it is more like consolidation than fresh impetus

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Messaging is still the main data revenue generator

Mobile broadband rapidly gaining ground

Voice – don't underestimate the 'killer app'

HD voice is coming, but unlikely to shake up the market

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Operators need to focus on the network and tariff innovation

Infrastructure vendors need to build trust and not just networks

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The window of opportunity closes on WiMAX

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