

China VoIP (Voice-over-IP) Market Report, 2006-2007

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Abstracts

The VoIP business volume in China telecom operation market increased dramatically. Presently, the call duration of VoIP in China is the same to that of PSTN basically, but the growth rate of VoIP business is higher compared to PSTN. Up to Sep 2006, the IP call duration of telecom operators was 109.931 billion minutes, up 11.8% y-o-y, and accounting for 43.16% in the long-distance call duration. It is forecasted that the share of VoIP in the long-distance call market will be equal to or even exceed the total long-distance call of PSTN and mobile (GSM and CDMA) in the following two or three years gradually.

Besides the announced call volume from Ministry of Information Industry, there is still other VoIP international call volume operated by the illegal operators. The illegal VoIP call volume had increased at the pace of 30% every year from 2003 to 2006, and in 2006, the illegal VoIP international call volume amounted to about 550 million minutes, and the revenue was about RMB 490 million.

VoIP was applied in enterprises in early stage, and now, the enterprise market has become comparatively mature. Along with VoIP technology becoming more and more mature, the competitiveness of traditional operators decreases further in this field. In 2006, enterprise application market of VoIP developed rapidly. Compared to individual user market, the enterprise users pay more attention to the real combination of voice and data application via VoIP rather than the low cost. Based on it, the informatization of enterprise can be really integrated into internal management and business flow of the enterprises.

Currently, China has adopted strict Control policies to VoIP business, and according to Telecom Services Classification Catalog promulgated by Ministry of Information Industry in Feb 2003, only the 6 operators with basic telecom business operation qualification can operate VoIP business. However, it is permitted that Telecom and Netcom could

carry on trial PCtoPhone network telephone business in several cities, which shows that Ministry of Information Industry has realized the strong vigor of PCtoPhone VoIP.

In 2007, the deadline of the overall open of China basic telecom business will come in terms of WTO requirements, so China VoIP telecom Control policy will become loose. In addition, the pressure from foreign capital will bring fierce competition to VoIP market in the near future, which will lead to the dramatic increase of the market as well.

The traditional China telecom operators had gradually entered the actual network construction period of NGN and new-generation VoIP business in 2006, and along with the deepening of the enterprises' understanding to VoIP and the consideration of control cost, large enterprises have gradually accepted VoIP.

Influenced by mature VoIP equipment technology and price decrease etc, the medium and small enterprise market rapidly warmed up as well. All of these promote VoIP equipment to enter the real purchase phase in 2006, so VoIP equipment shows scale increase.

It is forecasted that the CAGR of VoIP equipment outlay of enterprises will amount to 48% in the following 5 years, and it will be RMB 4.2 billion in 2009.

The industry concentricity of VoIP equipment market was comparatively high in China in 2006, large foreign comprehensive equipment suppliers, such as Cisco and Avavy, accounted for the majority of the market shares. However, due to competitive performance/price ratio, many China local equipment suppliers also occupy certain market shares.

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