

Report on China's Telecom Industry in 2010-2012

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Abstracts

Revenues of China's telecom industry in 2009 totaled CNY 870.73 billion, increasing by 4.1% YOY. Among that, the main telecom business revenue totaled CNY 842.43 billion, increasing by 3.9% YOY. Among all the telecom business, revenue of mobile communications network reached 509.09 CNY billion, increasing by 13.2%, accounting for 60.4% of the main business revenue; revenue of local fixed telephone network reached CNY 135.68 billion, declining by 14.4% YOY, accounting for 16.1% of the main business revenue; revenue of long-distance telephone network reached CNY 98.26 billion, declining by 5.3% YOY, accounting for 11.7% of the main business revenue; and revenue of data communication network service reached CNY 99.4 billion, increasing by 0.3% YOY, accounting for 11.8% of the main business revenue.

In 2009, among the main business revenues of China's telecom industry, non-voice service revenue reached CNY 313.55 billion, increasing by 8.8% YOY, and its proportion in the main business revenue increased from 34.5% in 2008 to 37.2%. In 2009, China Telecom invested CNY 372.49 billion in fixed assets, increasing by 26.1% YOY.

In January-September of 2010, the business volume of China's telecom industry totaled CNY 2.27 trillion, increasing by 20.8% over the same period in 2009; Main business revenue of China Telecom totaled CNY 667.51 billion, increasing by 6.8% over the same period in 2009.

In January-September of 2010, the number of China's fixed-line subscribers reduced by 12.46 million, reaching 301.27 million. The number of PHS subscribers which was included in fixed telephone subscribers reduced by 13.18 million, reaching 32.82 million, and its share in fixed telephone subscribers decreased from 14.17% in the end of 2009 to 10.9%.

In January-September of 2010, the number of China's mobile subscribers experienced a net increase of 86.09million, reaching 833.30 million. In January-September of 2010, the number of broadband internet access subscribers for China's basic telecom enterprises enjoyed a net increase of 17.16 million, reaching 121.14 million, while the Internet dial-up subscribers reduced by 1.23 million.

In January-September of 2010, the revenue of Chinese mobile communication industry totaled CNY 465.10 billion, growing by 12.0% over the same period in 2009, and its proportion in main telecom business revenue rose from 66.42% in the same period of 2009 to 69.68%. In January-September of 2010, China's fixed telecom revenue totaled CNY 202.41 billion, dropping by 3.6% compared with that of 2009, and its proportion in main telecom business revenue rose from 33.58% in the same period of 2009 to 30.32%.

In January-September of 2010, China's fixed local calls decreased by 19.3% over the same period in 2009, while the duration of local calls increased by 19.2% YOY.

Since the completion of recombination and the issue of 3G licenses, China's telecom industry has set up a three-way struggle, and the competition of the telecom industry has entered a new stage of development. The year of 2009 became the start of this stage. The development of the telecom industry so far is observed to be driven by investment. Since 2010, China's investment in 3G will be reduced gradually, and the telecom industry will enter a "post-3G" era. Additionally, there will be a slowdown of investment-led growth, and the development of the telecom industry will be driven mainly by consumption.

It is expected that the adjustment of market policies for China's telecom industry will enable telecom operators to face a more relaxed, free, and pro-competitive environment, which indicates that more incentive competition will come into being. In 2011-2012, China will accelerate the combination of telecom network, broadcast network and Internet, and promote interoperability, resource sharing, and the development of information and cultural industries, by using of related policies. This interoperability is not only an opportunity but also a challenge for the telecom industry.

The following and more information can be acquired from this report:

Development of China's Telecom Industry

Development of China's Mobile Communication Industry

Development of China's Internet Access Service

Development of China's Fixed Telephone Service

Development of China's 3G industry

Competition in China's Telecom Industry

Operational status of China's Telecom Operators

Forecast on China's Telecom Industry

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