

The Revenue Drill - Squeezing the most out of 2G & 3G Networks

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Abstracts

Unfolding the new revenue opportunities around 2G/ 3G, strategies for maximising profits from mobile broadband opportunity, portfolio planning for growth via new revenue verticals, realistic and profitable strategies for harnessing VoIP and IP messaging uptake, latest trends in network management and pricing models, and much more.

Executive Summary

E1. Focus of the Report

Our Report “The Revenue Drill – Squeezing the most out of 2G/ 3G” is a strategic toolkit for unfolding the new revenue opportunities around 2G/ 3G as well as reviving the existing 2G/ 3G services to their fullest.

Despite all the excitement about 4G, it is important to note that although 2G connections have been declining since 2003, it still accounts for 70% of the total connections globally, and 2G will remain the second largest mobile technology for the rest of the decade. Moreover, 3G (which currently accounts for close to 30% connections globally) will continue to grow with the increasing penetration of smartphones, tablets, and other mobile broadband devices. In total, 2G and 3G will account for more than 80% of the total connections globally over the next 4 years.

In particular, 2G/ 3G will remain the most common mobile technology in Latin America, Africa, Middle East, Central and Eastern Europe, and Asia-Pacific (Excluding South Korea and Japan) for the next 4-6 years.

The purpose of our research is to help:

Mobile operators in formulating the right 2G/ 3G strategy over the next five years;

Mobile operators that are mainly targeting price-conscious users, and the new bottom of the pyramid take up;

Mobile operators in identifying the profitable 2G/ 3G opportunities across Latin America, Africa, Middle East, Central and Eastern Europe, and Asia-Pacific;

Tier 2 mobile operators, that are severely reeling under competitive pressure from emerging market trends (such as increasing dominance of device manufacturers and OTT players), and finding it difficult to generate revenues;

Mobile operators that are forced to postpone their breakeven timelines;

Mobile operators that are struggling to manage high operating cost, and are continuously losing investor confidence;

Tier 1 mobile operators, that are interested in best utilisation of their 2G/ 3G network bandwidth, and;

In opportunity spotting and scenario planning for network technologies (2G, 3G, 4G) with short term and long term cost-revenue implications.

E2. Scope of the Report

Here, we must specify that the Report is technology-independent: That is, the Report's sole purpose is to maximise revenues and profits from all the network resources irrespective of the level of technology you are currently operating at: 2G, 3G, or transitioning from 2G to 3G (or even transitioning from 3G to 4G). The report explores various ways by which you can identify and implement appropriate strategies to drive growth and innovation.

Keeping in sync with the theme we begin our Report with (Chapter 2) preparation for boosting 2G/ 3G Profitability – by overcoming the market challenges, making winning strategies, and identifying the competence required to boost up the profit margins.

The first section of the Chapter talks exclusively about disruptively overhauling the old

business strategies. It has been widely observed in the telecom market, especially in the case of MNOs, that although everything is fine: customer base is increasing, users are subscribing to the services, the operators' portfolio is in place, but that's not reflecting into ARPU. The reason is your customers are idle, either partially or fully. But, the question is: Why? One of the reasons is that somehow you are ignoring their needs or competition is offering better solutions or your users are looking for better solutions. Here comes the role of disruption – no matter what you offer - devices/ services/ software, you need to revamp them time and again to make them more useful and appealing to your users. You need to acclimatise and transform your offerings, otherwise you will be outdated.

We next tried to identify that what will drive the maximum revenue in medium term – voice, SMS/ MMS or broadband, and why operators need to re-examine their 2G/ 3G data strategy in emerging markets. The chapter further analyses the emerging trends in data pricing, mobile broadband, VAS business models, and prepaid/ postpaid strategies with exclusive cases.

A section is on Mobile Virtual Network Operators (MVNOs), and how MNOs can broaden their reach by collaborating with MVNOs and incrementing their revenues. Moreover, why and how an operator can itself enter a Greenfield market with minimal costs by operating as an MVNO has been analysed and interpreted.

Bharti Airtel's entry into emerging markets of Africa has been presented as a case study which would help mobile operators and vendors in devising a foolproof strategy by avoiding potential mistakes which many make in such initiatives.

Further, we have gauged the attractiveness of Greenfield markets and how mobile operators and vendors can identify particular segments which can be potential business cases, and which none of the other players have so far deduced.

Before moving on to the next chapter, we took into perspective the OTT Challenge (Communication and Media) and how operators can turn 'threats' into 'opportunities', especially in regards to the sudden upswing of OTT players. It's gradually becoming difficult to charge for communications services, so most OTT providers are forced to give their core messaging, voice, and video chat features free of cost. OTT providers are exploring many revenue streams like ad-based or free-to-use basic functionality and paid premium functionality. How can MNOs adapt to these business models to offer cheaper/ free basic communication services? The Chapter critically analyses OTT battleground and strategies that are going to help telcos to overcome the challenges

from OTT players.

As mobile broadband is definitely one of the biggest growth drivers for the industry, we have dedicated our next Chapter (3) to it. The chapter extensively covers the mobile broadband opportunity both globally as well as regionally. It provides an analysis of diverse consumer behaviour and usage patterns across different geographical regions, and related forecasts. Further, we have studies consumer behavior by segmenting it effectively, and presented few innovative pricing models, while side by side studying churn management, providing strategies to cut churn and retain customers. This chapter offers necessary tools to operators for devising right mix of offerings for exploring mobile broadband opportunity.

In Chapter 4 we have explored the most Profitable 2G/ 3G Mobile Services and Business Models to remain competitive in the future. The chapter contains an in-depth analysis of some of the most promising mobile services such as Mobile Advertising, Mobile Apps, M-Commerce, M-Health and Mobile Multimedia. Each section is loaded with some of the most successful/ noteworthy cases to make you easily visualise the revenue opportunities around them.

Chapter 5 provides ideal roadmaps for network modernisation and ways to minimise the total cost of network management.

Traffic migration offers significant advantages for network operators as the spectrum on which operators are running their 2G, 3G networks can be used to launch 4G network that can potentially bear 5 to 10 times more traffic. This is one of the major reasons that several operators across the world are considering decommissioning of 2G, 3G networks. However, it might not be always a wise decision, especially when an operator can generate more revenues from the 2G, 3G networks.

We have included certain 'progression' guidelines for operators as to how they might move from 2G to 3G and beyond with a case study on the network upgradation and modernisation strategies of Maxis Malaysia.

The Chapter further covers the important topics in modern mobile networks such as Evolved Packet Core (EPC), PCRF, Fixed Mobile Convergence (FMC), and Wi-Fi. All these are covered in detail with their strategic importance and ideal approaches towards them.

Chapter 6 is a complimentary section on LTE. Although the focus of the report is to

generate maximum revenues from 2G/ 3G, this particular chapter has been provided as a food for thought to all the operators that are still on earlier technologies (2G/ 3G or WiMAX), and when and why they should launch LTE (however, the chapter is equally handy for the operators that have already launched LTE). Besides explaining and analysing the advantages of LTE, we have studied the global LTE deployment trend and uptake of leading LTE operators. Lastly, several global and regional forecasts on LTE subscribers and revenues for the next five years have been presented for evaluating the LTE market revenue opportunities.

E3. Methodology

We took into our ambit the past few years and for this particular study we regionally explored some of the prominent mobile operators, device makers, infrastructure providers and interviewed several telecoms experts, C-level and mid-level executives.

Information Sources: Major sources include both face to face and telephonic interviews with telecom industry experts and consumers. It also includes various surveys that were conducted in different regions of the world. Other sources comprise of organisations' websites and financial reports, books, trade journals, magazines, white papers, industry portals and numerous government sources.

Forecasting Methodology: We used extensive database of macroeconomic and sector specific data to generate industry forecasts. We used Judgment based methods like the Delphi method and Extrapolation; Time series methods like Exponential smoothing, Cyclical and seasonal trends and Statistical modeling, as well as the Survey method. The initial baseline projection is computed with the most recent market data. After an initial baseline forecast, all probable future macroeconomic and industry specific occurrences and assumptions are taken into consideration to generate the final forecast.

Key Questions Answered:

What are the new avenues of growth for 2G/ 3G offerings?

Why operators need to alter their voice and messaging strategy?

How can operators leverage maximum gains from low consumer spend markets?

What are the new verticals (m-commerce, m-health and m-entertainment etc.) MNOs can explore to generate more revenues?

How to collaborate with other players in the ecosystem for shortening your time to market?

How the scenario would shape up between content aggregators/ developers and MNOs in the Mobile VAS arena?

How services should be offered in different phases for smooth transition to fixed-mobile convergence (FMC) and what are the new avenues where fixed-line operators can team up with mobile operators?

What are the latest penetration techniques MNOs are using across untapped markets?

How to drive consumer adoption of MBB across stubborn regions/ markets?

How to segment your MBB user class and cater to their personalised needs?

How could the App community exploit opportunity of doing business with MNOs, Handset Makers and Store owners – and their best propositions?

What are the current trends in network management and charging solutions?

How operators can build a robust PCRF solution?

Why LTE is growing so fast, and how big is the LTE opportunity?

Key Findings:

The worldwide revenue contribution from traditional mobile services (Voice and SMS/ MMS) will exhibit a downward trend in the coming years. At the same time, revenue contribution from broadband services will have a sharp uptake. The trend can be mainly contributed to the increasing penetration and availability of smartphones and other data consuming mobile devices. However, as the devices' ecosystem is not in favour of 4G/ LTE offerings in most of the emerging markets, it would be more profitable to offer 2G/ 3G data services.

2G still accounts for 70% of connections globally, however, 2G connections will continue to decline in the coming years with the growing penetration of smartphone and tablets, and users' migration to next-generation networks. Despite all these developments, total 2G and 3G connections will account for more than 80% of the total connections globally over the next 4-6 years with 2G accounting for around 35% connections.

In 2012, revenue from voice and messaging accounted for 72% of the total service revenue of Vodafone group and data contributed for only 15%. Therefore, although data is witnessing faster growth, operators must protect their voice and messaging revenue with realistic approaches, as VoIP and IP messaging has considerably eroded the traditional voice and messaging revenues.

Mobile device manufacturers and OTT players have hijacked almost entire attention of customers, and MNOs are currently reeling under that pressure. However, they should not panic but need to safeguard their position and avoid unnecessary risks. Identifying the segments with high profit margin or high volume potential, and holding their position in the market will offer great opportunities to monetise their investment in the long run.

Our survey revealed that majority of OTT players are in pressure to collaborate with MNOs/ ISPs to ensure QoS and believe that QoS can only be guaranteed by partnering with data providers.

Smart mobile devices are slowly entering into the workplace and the trend has started impacting the industry in two ways. On the one hand, demand for data and mobility services is growing exponentially, and on the other hand it is also driving enterprises to replace computing devices or promote BYOD.

The demand for smartphones is growing rapidly and it is going to make more than 50% of the total mobile phones shipped globally in 2013. The worldwide shipment for smartphones will reach 1.7 billion by 2018.

Most of the activities in the telco industry are currently revolving around mobile broadband. However, it must be noted that fixed line will not only carry at least ten times more traffic than the mobile network during the next 5-8 years, but it will also be crucial for the widespread growth of mobile broadband. In fact, fixed

mobile convergence (FMC) will be the business model that will work best in the coming years through optimal use of fixed and mobile technologies.

The global LTE subscriber base reached 62 million in 2012, exhibiting a year-on-year growth of over 370%. With more number of LTE networks as well as rise in the number of LTE smartphones in the market, LTE subscriber base will grow at faster pace during the forecasted period (at a CAGR of 40% during 2013-2018) and will cross 1 billion by the end of 2018.

Who can benefit from this Report?

Operators

For a better understanding of the current telecom market dynamics with a focus on 2G/3G revenue opportunities, challenges, and future roadmaps. Business Case Studies, Absolute picture of the MBB subscriber growth and psychology, and recent technological developments (Smartphones, Tablets, Mobile Commerce and Payments, Mobile Multimedia, PCRF, etc.) is a must read for more informed strategic planning.

Device Manufacturers and Infrastructure Vendors

For a better product development and to infuse a competitive edge into the product/services in sync with the technological developments, end user lifestyles, and operators' challenges in meeting the market demand efficiently.

Content Providers and Application Developers

To gain an insight into the market expectations and opportunities that mobile market will generate across various markets in the coming years. To prepare for the likely changes that Content Providers and Application Developers must go through to remain relevant and profitable in the market.

Telecom Investors

With an obvious interest in the current happenings within the mobile broadband segment of Telecoms, the report provides an in-depth analysis for telecom investors. The report will help you in identifying the right choices for your investments.

Contents

CHAPTER 1: EXECUTIVE SUMMARY

CHAPTER 2: BOOSTING 2G/ 3G PROFITABILITY WITH BEST OPERATOR PRACTICES

2.1 Strategies to Boost up Profit Margin

2.1.1 Which will drive the maximum revenue in medium term – voice, SMS/ MMS or broadband?

2.1.2 What should be your data strategy for maximising RoI?

2.1.3 Data Package – How to obtain a profitable mix which is appealing also?

2.1.3.1 Case Study: Verizon's Share Everything Plan

2.2 MBB Data ARPUs

2.2.1 The Effect of Mobile Broadband on Operator's Revenue (ARPU)

2.3 What should be your VAS strategy in different markets?

2.3.1 VAS Business Models for Emerging Markets: What to offer and how to monetise?

2.3.2 Matured Markets: What the market demands and how to meet the customers' expectations?

2.4 Your Darling Dollar Strategy: Prepaid vs. Postpaid

2.4.1 Comparison of Go-to-Market Strategy – Unefon Mexico vs. Virgin Mobile UK

2.5 The Next Level – QoE, Success Mantra of the Future

2.6 Emerging Markets: Operators/ Vendors Need to Bet on for Future Growth

2.6.1 What should be your go-to-market strategy?

2.6.2 Case Study: Bharti Airtel

2.7 How lucrative are the Greenfield markets?

2.8 The MVNO Route

2.8.1 Why is it currently the best strategy to enter into telecoms market?

2.8.2 How MNOs can leverage MVNO opportunity to generate incremental revenue while keeping user base and brand value intact?

2.8.3 How MVNOs can create a compelling value proposition?

2.8.3.1 Case Study: Virgin Mobile, UK

2.8.3.2 Case Study: Ortel Mobile, Europe

2.9 The OTT Challenge (Communication and Media)

2.9.1 How serious is it a threat for telecom operators and how secure is the future of OTT players?

2.9.2 Case Study: Tango- Leading OTT Mobile Video Calling Service

2.9.3 Case Study: KDDI-Skype Partnership – if you can't beat 'em, join 'em

- 2.9.4 Case Study: Hike – Be brave to beat yourself!
 - 2.9.4.1 What propelled the Indian upstart to the top?
 - 2.9.4.2 Hike's route to revenue
- 2.9.5 Who wins the MNO – OTT Tug of War?
- 2.10 How to put the accelerator on the ARPU meter?
 - 2.10.1 No Matter What You Offer – Devices/ Services/ Software - Today's Telco Market Needs DISRUPTIVE INNOVATION!
 - 2.10.2 Why winning existing customers again and again is so much important?

CHAPTER 3: MOBILE BROADBAND – REGIONAL CONSUMER PSYCHOLOGY, USAGE PATTERNS AND REVENUES 2014 – 2018

- 3.1 MBB Subscriptions & Revenue Forecast 2014 – 2018
 - 3.1.1 Global
 - 3.1.2 Asia Pacific
 - 3.1.3 North America
 - 3.1.4 Latin America
 - 3.1.5 Africa
 - 3.1.6 Middle East
 - 3.1.7 Europe
- 3.2 Rural/ Underserved Regions – Opportunities and Challenges
 - 3.2.1 Opportunities
 - 3.2.2 Challenges
- 3.3 Unserved Regions
- 3.4 Metropolitan Regions – Emerging Challenges
- 3.5 Customer Segmentation, Pricing and Service Bundling
 - 3.5.1 Effective Mobile Broadband Strategies to Reduce Churn Rate and Retain Customers
 - 3.5.2 Mobile Broadband - Innovative Pricing Models for Different Consumer Segments
 - 3.5.3 Social Media: Newer Tactics to win Spendthrifts – The Youths
 - 3.5.4 Brand Presence – How social you are?

CHAPTER 4: PROFITABLE 2G/ 3G MOBILE SERVICES AND BUSINESS MODELS FOR 2014 AND BEYOND

- 4.1 Mobile Advertising Revenue Opportunity for MNOs
 - 4.1.1 Case Study: Mobile Marketing and Wallet Platform WEVE
 - 4.1.2 Case Study: AT&T AdWorks
 - 4.1.3 Case Study: Global Advertising Alliance by Telefónica Digital and Pinsight

Media+

4.2 Mobile Apps – What’s your App Strategy (MNOs, Vendors, App Stores, Developers)?

4.2.1 Monetising Your Business Models

4.2.2 Strategy for New App Launches

4.2.2.1 Fabrication Dilemma – Big Question “What to offer?”

4.2.2.2 App Categories

4.2.2.3 App Platforms: Where is the money – Android, iOS or?

4.2.3 Revenue Opportunities via Apps for Small-to-Midsized Vendors

4.2.3.1 Mobile App Revenue

4.2.4 Should every operator launch their own app store?

4.2.4.1 Case worth Analysing: Verizon Apps

4.2.5 MNOs, Vendors and App Developers’ Collaboration Opportunities

4.3 Opportunities in the M-Commerce Arena

4.3.1 M-Payment Market is Heating Up

4.3.1.1 MasterPass: A New M-Payment System from MasterCard

4.3.2 Measuring RoI for MNOs from M-Payment Services

4.3.2.1 Case Study from Kenya: Safaricom’s mobile money transfer service M-Pesa

4.3.3 Lean Principals for Consistent Growth

4.3.3.1 How to come up with Minimum Viable Products for maximum gains?

4.3.3.1.1 How did T-Mobile drive smooth m-payment adoption?

4.3.3.2 How to attract new customers?

4.3.3.3 Ways to Drive Customer Loyalty via Early Adopters

4.3.3.4 Retention and Brand Building using Disruptive Tactics

4.3.4 M-Payment Types

4.3.4.1 Premium SMS-based Transactional Payments

4.3.4.2 Direct Operator Billing

4.3.4.3 Mobile Web Payments (WAP)

4.3.4.4 NFC (Near Field Communication) Based Payments

4.3.5 Let’s Analyse the NFC Mobile Payment Market

4.3.5.1 NFC Device Ecosystem

4.3.6 KYC Opportunity: Unexplored Avenue in Banking

4.4 M-Health: Unveiling the Hidden Potential

4.4.1 M-Health Services Categories

4.4.2 How to drive M-Health adoption?

4.4.2.1 Barriers to M-Health Technology Adoption for Healthcare Providers

4.4.2.2 Barriers to M-Health Technology Adoption for Patients/ End Users

4.4.2.3 Ways to Overcome Challenges and Drive M-Health Adoption

4.4.3 M-Health Avenues

- 4.4.4 Case Study: Vodafone mHealth
- 4.4.5 Current Market Landscape and Future Revenue Potential
- 4.5 Monetising the Mobile Multimedia Services
 - 4.5.1 Key Advantages
 - 4.5.1.1 Growth in Data Revenue
 - 4.5.1.2 Key Differentiator to Churn Control
 - 4.5.2 Case Study: SK Telecom, South Korea
 - 4.5.3 Strategies to Revive Mobile Multimedia Services
 - 4.5.3.1 Which type of segmentation is best suited for multimedia services?
 - 4.5.3.2 What to offer?
 - 4.5.3.3 Business/ Revenue Model to make Mobile Multimedia Services Attractive and Profitable
 - 4.5.4 Which are the most profitable markets for launching multimedia services?
 - 4.5.5 Revenue Opportunities for Vendors

CHAPTER 5: IDEAL INITIATIVES TOWARDS NETWORK MODERNISATION, MANAGEMENT, AND ROAD MAPPING FOR 2014-2018

- 5.1 Have you reaped your 2G/ 3G investment? Decide Yourself!
 - 5.1.1 Decide timing of Network Upgradation
 - 5.1.2 Worldwide Network Upgradation and Shifting Customers to More Advanced Networks
 - 5.1.3 Case Study: Analysing the Network Upgradation and Modernisation Strategy of Maxis Malaysia (2G, 3G and 4G/ LTE)
 - 5.1.3.1 Country Profile – Malaysia
 - 5.1.3.2 What made Maxis to plan network upgradation and modernisation?
 - 5.1.3.3 Evaluating Maxis' Network Modernisation Investments and its Impact on the Maxis' Top and Bottom Line
 - 5.1.3.4 Benchmarking Maxis' EV/EBITDA with its Peers and Others
- 5.2 Evolved Packet Core (EPC) Model: Key to Excellent Traffic Management and a Great QoS
 - 5.2.1 Which is the best model? What should be your approach to EPC deployment?
- 5.3 Policy Management Strategies for Encashing QoE
 - 5.3.1 Role of Policy Management
 - 5.3.1.1 Minimising Network Congestion
 - 5.3.1.2 Enhancing QoS (Quality of Service)
 - 5.3.1.3 Service Monetisation
 - 5.3.2 Challenges in Policy Management Implementation
 - 5.3.3 How PCRF can be implemented to take maximum benefit from 3G and 4G/ LTE

investments?

5.3.4 Selecting the right vendor

5.3.5 How MNOs can minimise their PCRF/ Policy Server deployment costs?

5.3.6 Case Study: Analysis of Verizon Wireless' approach to PCRF

5.4 How to tame the Capex and Opex?

5.4.1 Case Study: Bharti Airtel – Pioneered the Innovative Business Model of Outsourcing and Sharing

5.5 Fixed Mobile Convergence (FMC): Fixed Line has its Role to Play

5.5.1 Verizon's Global Fixed Mobile Convergence

5.5.2 Com Hem's Fixed Mobile Convergence (FMC) Application

5.5.3 Traffic Offload from Mobile Networks to Fixed Networks

5.6 Strategic Importance of Wi-Fi beyond Traffic Offloading

CHAPTER 6: A COMPLIMENTARY SECTION ON LTE

6.1 Global LTE Deployment Trend

6.2 LTE Growing Faster than HSPA

6.3 LTE CAPEX at an all time high

6.4 LTE Uptake of Major Operators

6.5 Why is LTE Ecosystem rising so quickly?

6.5.1 Spectral Efficiency and CAPEX/ OPEX Reduction

6.5.2 LTE is a must to meet the demand of Exponentially Growing Data Consumption

6.5.3 4G/ LTE offers better Marketing Proposition than 3G/ HSPA

6.6 Will LTE & WiMAX Coexist?

6.7 Global LTE Subscribers 2013-2018

6.8 Regional LTE Subscribers 2013-2018

6.9 Global LTE Subscribers by Type (LTE TDD & LTE FDD) 2013-2018

6.10 LTE Market Revenue Potential 2013-2018

6.10.1 Global LTE Service Revenue 2013-2018

6.10.2 Regional LTE Service Revenue 2013-2018

6.10.3 LTE Devices Market 2013-2018

6.10.4 LTE Infrastructure Market 2013-2018

CHAPTER 7: FINDINGS AND CONCLUSIONS

List Of Tables

LIST OF TABLES

Table 2-1 Verizon's Share Everything Plan for Phones and Internet Devices, October 2013

Table 2-2 Virgin Media Value Proposition

Table 2-3 Ortel Mobile Value Proposition

Table 2-4 Free calls from Ortel Mobile to Ortel Mobile

Table 3-1 Effective Techniques to Cut Churn

Table 3-2 Management of Post-paid and Pre-paid User Class

Table 3-3 Vodafone Ireland's Business Share Plan, November 2012 – Key Features

Table 3-4 MBB (Tablet) Corporate Pricing Models by Vodafone UK, November 2012

Table 3-5 Individual/ Personal MBB Plans by Vodafone New Zealand, November 2012

Table 4-1 Fast Forward - Mobile Marketing and Wallet Platform WEVE

Table 4-2 List of Available NFC Devices, April 2013

Table 4-3 M-Health Applications

Table 4-4 Vodafone mHealth Solutions

Table 4-5 M-Health Revenue by Region (In US\$ Billion), 2018

Table 4-6 M-Health Revenue by Stakeholders (MNOs, Device Vendors, Healthcare Providers, Content Providers/ Application Developers) (In US\$ Billion), 2018

Table 5-1 Country Profile – Malaysia

Table 5-2 Maxis Non-Voice Revenue Break-up, Q4 2012

Table 5-3 Maxis Performance (Growth in Subscriptions, Revenue and EBITDA), 2009 - 2012

Table 5-4 EV/ EBITDA of Maxis and its Peers, 30th April 2013

Table 5-5 Maxis' Valuation based on EV/ EBITDA, 30th April 2013

Table 5-6 QoE Expectations and Performance Requirements by Service Type

Table 5-7 Major PCRF Vendors, Solutions and their Clients

Table 6-1 LTE Subscriber Growth of Selected Operators (In %), June 2012-June 2013

Table 6-2 Regional LTE Subscribers Forecast (In Million), 2013-2018

List Of Figures

LIST OF FIGURES

Figure 2-1 Worldwide connections by technology 2G vs. 3G vs. 4G (In %), 2012-2018

Figure 2-2 Worldwide Revenue Share of Voice, SMS/ MMS and Broadband (In %), 2013, 2016, and 2018

Figure 2-3 Types of Data Plans among Smartphone Users in Key Markets (In %), 2013

Figure 2-4 The Evolution of Data Pricing and ARPU Trend

Figure 2-5 Verizon Wireless' EBITDA Service Margin (In %), Q3 2011, Q2 2012, Q3 2012 and Q1 2013

Figure 2-6 Verizon Wireless' Uptake of Shared Data Plan (in %), October 2012 and April 2013

Figure 2-7 Blended ARPU, MBB Operators and Non-MBB Operators, 2005 – 2013

Figure 2-8 Share of Mobile Operator's Revenue from Non-Voice Services (In %), 2005, 2011, 2012, 2016 & 2018

Figure 2-9 Prepaid Mobile Users: Smartphone vs. Feature Phone in key Markets (In %), 2013

Figure 2-10 The MVNO Business Model

Figure 2-11 MVNOs' Activities along the Value Chain

Figure 2-12 Typical cost structures for MNOs and MVNOs

Figure 2-13 Worldwide MVNO launches by region, 1991-2010

Figure 2-14 Worldwide MVNO Subscriptions (In Million), 2012 – 2018

Figure 2-15 Virgin Mobile, UK Subscriber Growth 2000 – 2007

Figure 2-16 Tango Subscribers (In Million), October 2010, June 2011, September 2012 and November 2012

Figure 2-17 KDDI ARPU Growth (In JPY), Q3 2009 – Q2 2011

Figure 2-18 Hike App Downloads (In Million), February 2013 and April 2013

Figure 3-1 Global Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-2 Global Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-3 Asia Pacific Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-4 Asia Pacific Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-5 North America Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-6 North America Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-7 Latin America Mobile Broadband Subscriptions Forecast (In Million), 2013 –

2018

Figure 3-8 Latin America Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-9 Africa Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-10 Africa Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-11 Middle East Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-12 Middle East Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-13 Europe Mobile Broadband Subscriptions Forecast (In Million), 2013 – 2018

Figure 3-14 Europe Mobile Broadband Revenue Forecast (In US\$ Billion), 2013 – 2018

Figure 3-15 Churn Behavior in Key Markets, 2012

Figure 3-16 How to Drive Customer Retention and Loyalty?

Figure 3-17 Important Factors behind a Successful Pricing Strategy

Figure 3-18 Vodafone Ireland's Business Share Plan, November 2012

Figure 3-19 Levels of Brand Social Engagement

Figure 4-1 WEVE Value Chain

Figure 4-2 Worldwide Smartphone App Consumption per day by Category (In Minutes), Q1 2011 and Q1 2012

Figure 4-3 Fastest Growing App Categories, October 2011 - March 2012

Figure 4-4 Evernote's Average Revenue per User per App by Operating System (In US\$), 2012

Figure 4-5 Worldwide Mobile App Revenue Forecast (In US\$ Billion), 2011 – 2018

Figure 4-6 Revenue Share of M-Commerce as a percentage of E-Commerce, 2012-2018

Figure 4-7 Worldwide M-Payment Users (In Million), 2011 – 2018

Figure 4-8 Worldwide M-Payment Revenue (In US\$ Billion), 2011 – 2018

Figure 4-9 Safaricom's Revenue (In Sh Billion), H1 2012

Figure 4-10 Safaricom's Revenue Break up (In %), H1 2012

Figure 4-11 Financial Services Outlets in Kenya, 2009

Figure 4-12 Customer Life Cycle

Figure 4-13 Worldwide NFC M-Payment Forecast (In US\$ Billion), 2013 – 2018

Figure 4-14 Worldwide M-Health Revenue (In US\$ Billion), 2013 – 2018

Figure 4-15 M-Health Revenue by Region (In %), 2018

Figure 4-16 M-Health Revenue by Stakeholders (MNOs, Device Vendors, Healthcare Providers, Content Providers/ Application Developers) (In %), 2018

Figure 4-17 M-Health Revenue by Various Categories (In US\$ Billion), 2018

Figure 4-18 M-Health Revenue by Various Categories (In %), 2018

Figure 4-19 Worldwide Mobile Multimedia Revenue (In US\$ Million), 2012

Figure 4-20 Worldwide Mobile Multimedia Market Y-o-Y Growth (In %), 2011 and 2012

Figure 5-1 Maxis Non-Voice Revenue (In RM Million), FY 2011 - FY 2012

Figure 5-2 Maxis Network Modernisation Expenditure (In RM Billion), FY 2009 – FY 2012

Figure 5-3 Maxis Mobile Subscriptions (In Million), 2009 - 2012

Figure 5-4 Maxis Revenue (In RM Million), 2009 - 2012

Figure 5-5 Maxis EBITDA (In RM Million), 2009 - 2012

Figure 5-6 Maxis Stock Performance (In MYR), 2011 - April 2013

Figure 5-7 The Open Evolved Packet Core

Figure 5-8 LTE Network Capacity

Figure 5-9 Smartphones and Applications getting Customer's Mindshare

Figure 5-10 Policy and Charging Control Architecture

Figure 5-11 Key PCRF Interfaces

Figure 5-12 The Rise of Bharti Airtel's Empire

Figure 5-13 Worldwide Mobile Devices (Offloaded) Traffic on Fixed Line (In Exabytes per Month), 2012 – 2018

Figure 5-14 Worldwide Cellular Traffic vs. Mobile Devices (Offloaded) Traffic on Fixed Line (In %), 2012 – 2018

Figure 6-1 Global LTE Deployments and Commitments, 2013

Figure 6-2 Commercial LTE Network Launches (In Numbers), 2009-2013

Figure 6-3 Number of Network Commitments after 6 months and 12 Months of 1st Commercial Launch

Figure 6-4 Global LTE CAPEX (In US\$ Billion), 2013-2018

Figure 6-5 LTE Subscribers of Selected Operators (In Million), June 2012 and June 2013

Figure 6-6 Global LTE Subscribers Forecast (In Million), 2011-2018

Figure 6-7 Regional LTE Subscribers Forecast (In Million), 2013-2018

Figure 6-8 Regional LTE Subscribers Market Share (In %), 2013-2018

Figure 6-9 Global LTE Subscribers Forecast by Type (LTE TDD & LTE FDD) (In Million), 2013-2018

Figure 6-10 Global LTE Market Forecast (In US\$ Billion), 2013-2018

Figure 6-11 Global LTE Market Forecast by Type (In US\$ Billion), 2013-2018

Figure 6-12 Global LTE Service Revenue (In US\$ Billion), 2013-2018

Figure 6-13 Regional LTE Service Revenue Forecast (In %), 2018

Figure 6-14 LTE Devices Market Forecast (In US\$ Billion), 2013-2018

Figure 6-15 LTE Infrastructure Market Forecast (In US\$ Billion), 2013-2018

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