

Symposium on Telecommunications
to Commemorate the 10th Anniversary of the
Fourth Protocol to the GATS
20-21 February 2008, Geneva, Switzerland

ICT Market Trends

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Market characteristics post BTA

Open trade in telecommunication services has contributed to:

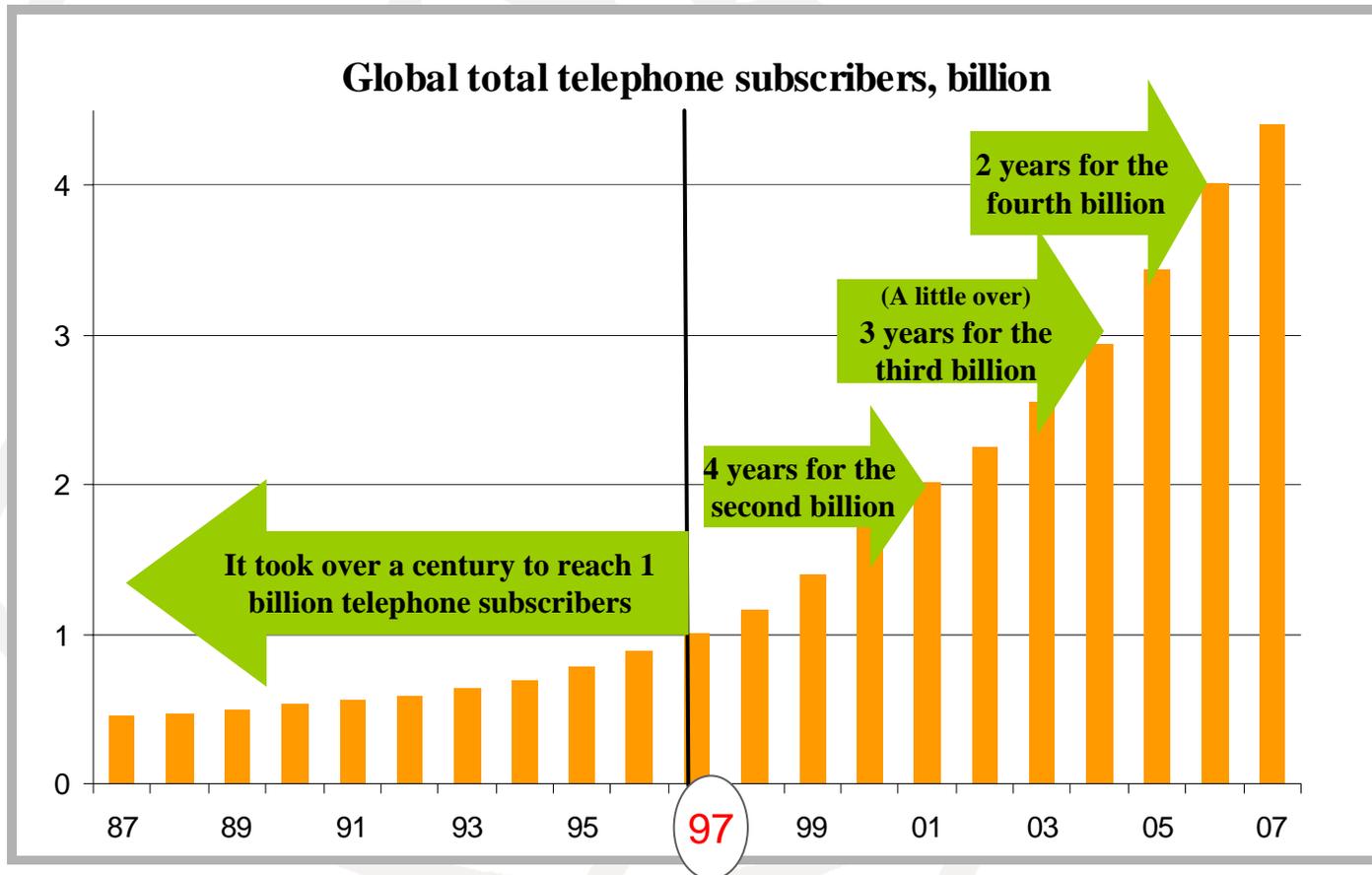
On the business/public sector side

- Competition and privatization
- New market opportunities
- Higher levels of investments and revenues
- New business models and technological innovations

On the consumer side

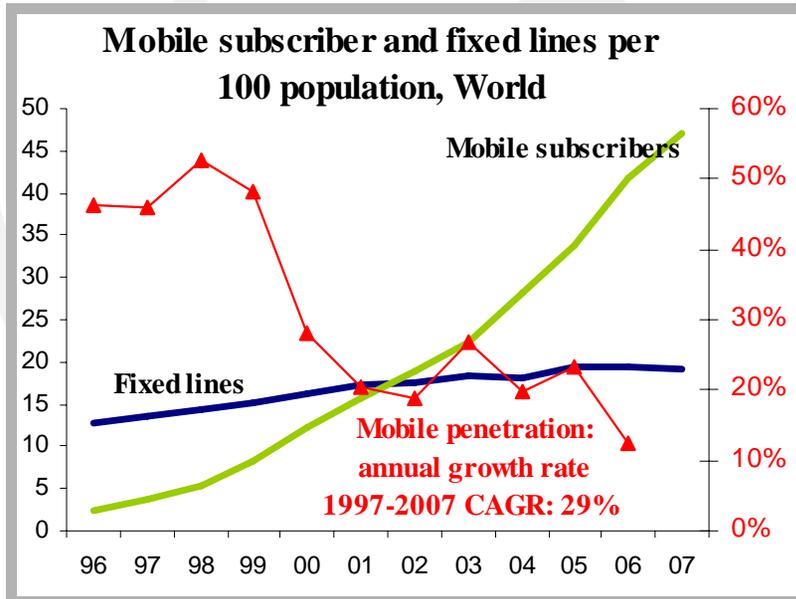
- Lower prices for businesses and consumers
- More consumer choices through new products, services and applications
- Higher ICT levels and new ICTs

10 years before and after the BTA

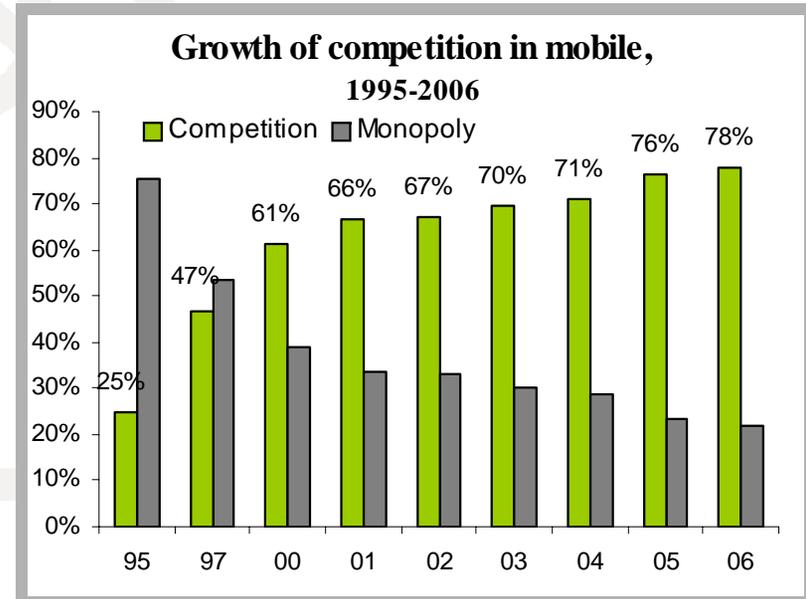


Source: ITU World Telecommunication/ICT Indicators Database

Competition and growth in the mobile sector



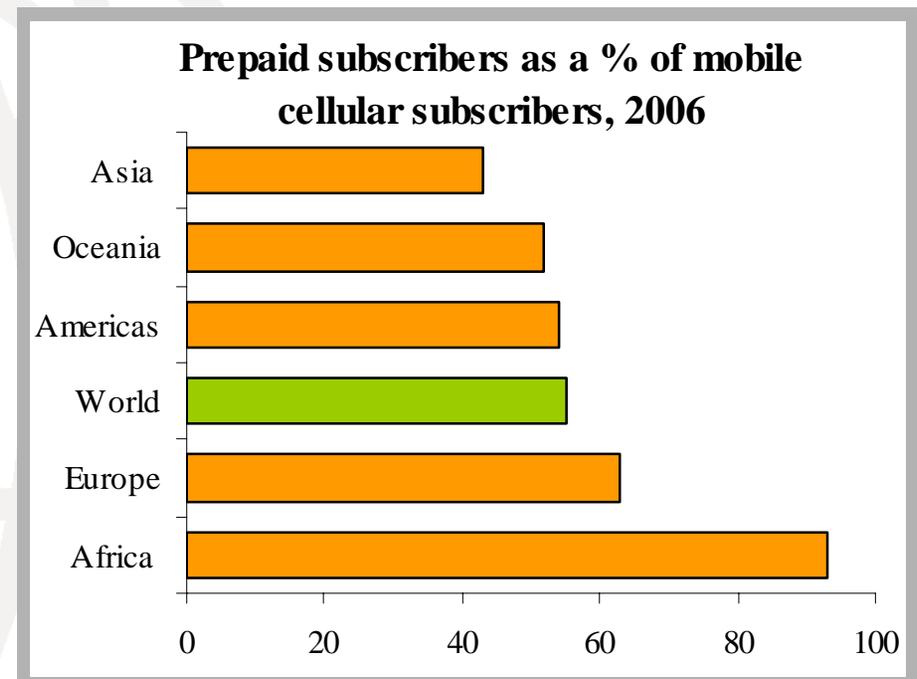
Source: ITU World Telecommunication/ICT Indicators Database



Source: ITU World Telecommunication Regulatory Database

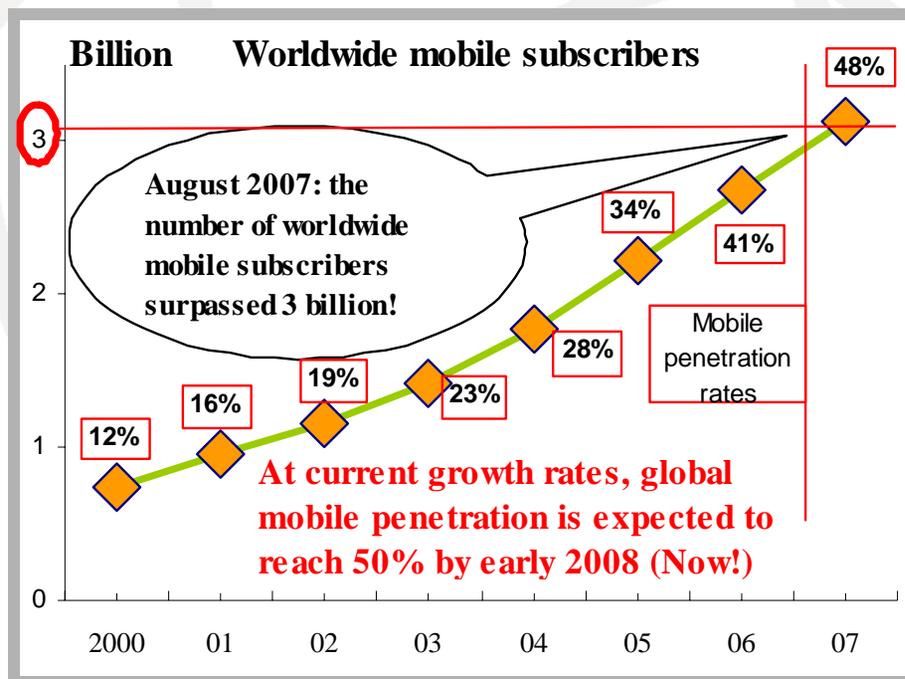
Secrets of success

- **Affordability**
 - Although rebalancing initially increased local call prices, international calls and mobile and Internet tariffs have decreased substantially over the last decade
- **Accessibility**
 - In 2006, global mobile population coverage was 79%
- **Innovation in applications, services & devices**
 - Prepaid (flexibility & control, low-income groups)
 - SMS (affordable, easy to use)
 - Ultra-low-cost handsets



Source: ITU World Telecommunication/ICT Indicators Database

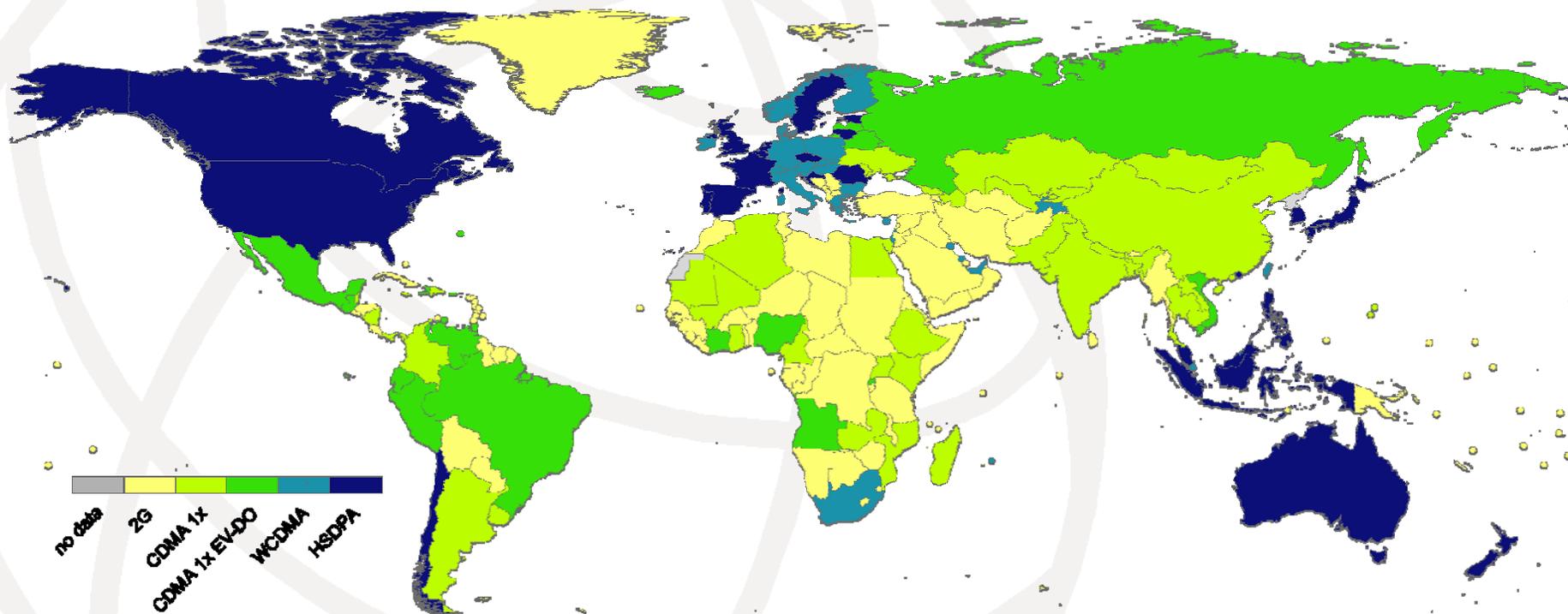
Mobile sector...still room for growth?



Source: ITU World Telecommunication/ICT Indicators Database

- Majority of new subscribers during 2007 come from BRIC economies
 - Brazil: 15 million
 - Russia: 20 million
 - India: 45 million (18%)
 - China: 80 million (40%)
- From 2G to 3G and +
 - Despite 3G auction rollercoaster and delays in rollout, more and more countries today are licensing commercial 3G networks
 - 3G subscriber numbers on the rise

IMT worldwide, 2007



Source: ITU World Telecommunication Regulatory Database