

China Telecommunications

AN IDC CONTINUOUS INTELLIGENCE SERVICE

The global telecom industry has been moody, and China's telecom industry has remained resilient and active as well. With China's entry into the WTO and the 3G license release upcoming, China's telecom operators have to be more creative and innovative in order to deliver more sophisticated services that meet market requirements. IDC's *China Telecommunications* intelligence service provides a qualitative and quantitative analysis of China's telecom market in 2004 and a five-year projection from 2004 to 2009. This service is the essential guide into the dynamic China telecom market.

Markets Covered

This service covers the following segments of China's Telecommunications market:

- Carriers and telcos
- IP telephony
- GSM/CDMA, GPRS, and 3G
- Wireless LAN
- Telecom value added services
- Mobile handset
- Network equipment
- Broadband applications

Subjects Analyzed

Throughout the year, this service will address the following topics:

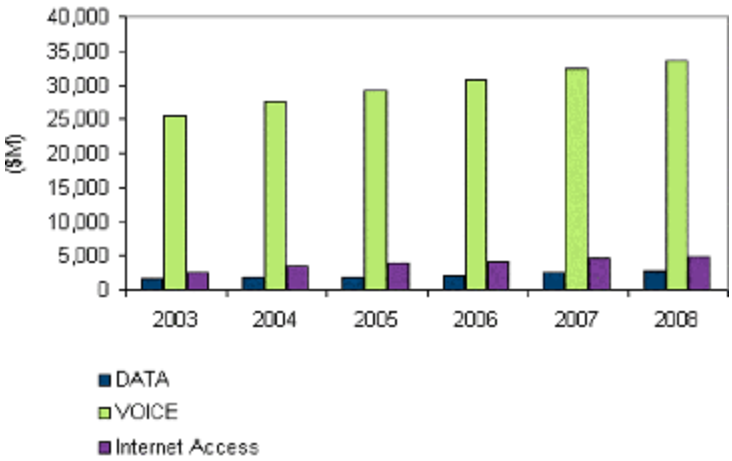
- Carrier competition analysis and profiles
- Mobile application and its ecosystem
- Competitive analysis of mobile handset vendors
- IP telephony deployment
- Profiles of broadband application service providers
- Competitive analysis of network equipment vendors

Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. When will licenses for 3G services become available in China? What regulations will impact the market? Will CDMA succeed in China?
2. Will China be able to sustain the growth of mobile subscribers? Will data services pick up? Which handset vendors are most successful and what are the keys to their success?
3. What are the market trends and regulations for WLAN? Who will be the leading equipment vendors? What is the strategy of key carriers?
4. In China's IP and VAS market, where are the emerging opportunities and who are the key players to watch?
5. What happened in the broadband market? Where's its bottleneck? Which is the killer application?
6. What are the opportunities for equipment vendors? Will self-installed and managed enterprise deployments take-off? Who are the key services providers and equipment vendors fueling the growth in this market?

China Telecom Network Services Revenue Forecast, 2003 –2008



Source: IDC, 2004

Competitive Analysis

IDC's *China Telecommunications* intelligence service analyzes product and vendor strategies, market shares and competitive positioning of key telecom service providers and leading equipment vendors. Examples of companies tracked include:

China Mobile, China Netcom, China Telecom, China Unicom, Cisco, Huawei, Huawei-3com, Juniper, Motorola, Nokia, Samsung, Siemens, and Sony-Ericsson.

Research Agenda

Throughout the year, this service will offer insight into the latest trends impacting the market. Potential studies include:

China's Telecom Services Market Overview, 2004-2009
This study provides a complete overview of telecommunications services in China. This includes the PSTN and non-PSTN market, as well as the data communications and mobile services markets. Profiles of key service providers will be included together with an introduction to the overall telecommunications regulatory environment in China.

China's Mobile Handset Market Analysis and Forecast
As China is the world's largest mobile subscriber market, IDC will assess mobile handset shipment of both international and local handset equipment vendors. This study will include data and forecasts for subscriber market size and revenue opportunities, as well as handset equipment sales and vendor market share in 2004.

China's Mobile Application Analysis and Forecast
In 2004, with 2.5G wireless services and application comes up, wireless data service revenue increase quickly. More and more general public begin to know and take use of the new wireless service in their daily life. This study will focus on these topic and analysis wireless ecosystem.

China's Broadband Application Analysis and Forecast
Broadband is fast becoming an important element of the Internet access services market in China. As more service providers rush to enter the market, Broadband application will be competitive and such telecom and vendors can expect to ride on the wave of new opportunities. IDC sizes both broadband services revenue and subscribers for 2004. IDC also forecasts the revenue opportunities available to service providers in its five-year forecast up to 2009. Operator profiles will also be provided to provide a competitive landscape.

China's Wireless LAN Market Analysis and Forecast
This study provides a detailed analysis of the key market dynamics for WLAN development in China, a five-year shipment forecast, installed base and revenue forecasts, as well as market segmentation by form factor and technology.

China's IP Telephony Analysis and Forecast
This study looks at the network equipment like Stand-alone IP Gateways, Gateway Switches, Softswitches. This study also looks at the market potential for IP Telephony equipment on the CPE side - from softphones to IP phones to IP Gateways and IP-PBXs. IDC assesses the revenue opportunities in terms of IP telephony equipment in China. IDC also provides a 5-year forecast up to 2009 and competitive analysis of the IP Telephony equipment market.

A Complete Intelligence Solution

IDC offers a complete market intelligence solution customized to meet your business requirements. The array of products and services available to you includes:

- The opportunity to have your specific questions answered through personal interaction with industry experts who cover the topics and markets in your service
- Around-the-clock access to our market intelligence on idc.com, IDC's personalized Web experience
- A view of the market's future with 12 months of continuous intelligence about its direction and the reasons behind it, along with actionable advice for taking advantage of existing and emerging opportunities
- Special client discount pricing on purchases of research from other services
- Complimentary admission to IDC's annual Directions conference, where you'll hear our latest forecasts and network with IDC analysts and other industry professionals
- Complimentary invitations to monthly executive telebriefings, interactive forums designed to provide you with insights about research and strategies directly from IDC analysts

To find out how our flexible packaging options can meet your specific business needs, please contact your IDC sales executive.

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