



Telecom Advisory Service

Already home to the world's largest mobile and fixed-line markets, China is now emerging as an important technology proving ground and launch pad for its own global telecom contenders Huawei and ZTE. The issuance of 3G licenses in early 2009 unleashed heavy capital expenditures by China Mobile, China Telecom and China Unicom set the scene for a more competitive mobile service and application market.

The BDA Telecom Advisory Service (TAS) provides timely, insightful analysis of key developments in this increasingly important market, providing an understanding of the underlying drivers behind changes in subscriber growth, competitive trends, and new technology adoption.

All BDA services are interactive including quarterly presentations, delivery of new research findings in person or by conference call, and analyst access. Clients can ask questions and discuss key market trends directly with our Beijing-based team.

Key Issues

- 3G and mobile broadband technology: What is the competitive outlook for W-CDMA, EV-DO and TD-SCDMA?
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- Subscriber growth and ARPU: What is the outlook for subscriber growth and ARPU of mobile, broadband, IPTV services?
- Operator marketing and new business strategy: How will operators target different market segments such as enterprise customers or address fixed-mobile convergence? How will they grow their value-added service revenue?
- Capex: Where are operators investing and what are their procurement strategies?
- Equipment vendors: How do Chinese and international vendors compete in China's telecom market? Will Huawei and ZTE be able to sustain their breakneck international expansion?
- Regulation: When will regulators implement Mobile Number Portability (MNP) or other asymmetric measures?

Focus Areas

Operator Strategy

- Competitive environment & market position
- Financial results and opex analysis
- Marketing strategies
- Capex and outsourcing strategies
- New business strategies
- New service and technology deployment

Telecom Market Trends

- Subscriber market size and growth for mobile, internet, broadband and IPTV services
- Analysis of ARPU, MoU, ARPM and other key metrics
- Telecom subscriber forecasts
- Telecom and media competition and convergence

3G Market Development

- Status of 3G network rollouts
- Prospects for carriers' service launch and market competition
- Vendors' competitive landscape
- Mobile WiMAX and WiFi in China

Equipment Vendor

- Telecom infrastructure market including 2G, 3G, IP network and broadband
- Major players in telecom infrastructure market
- Market position and competitive strategies

Innovative Technologies and Services



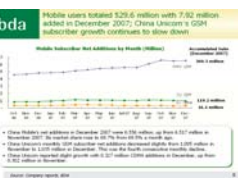



- IMS and NGN in China
- FTTH and PON deployment
- Carrier Ethernet and internet applications
- Wireless applications over 3G networks

Regulatory Environment

- Asymmetric regulation including Mobile Number Portability
- Indigenous standard policy
- Market openness to foreign investors
- Media and telecom convergence trend

Deliverables Summary

The BDA Telecom Advisory Service (TAS) provides its clients with a regular stream of information and analysis on China's telecom sector through the following deliverables.

Deliverable	Description
	<p>Sector Outlook Presentations</p> <p>Interactive, forward-looking presentations analyzing key industry trends and market developments. (4 per year.)</p>
	<p>Market Insight Reports</p> <p>PowerPoint reports with a deep-dive analysis of a specific trend or development impacting the industry. BDA's research analysts present reports in person or by conference call. (4 per year.)</p>
	<p>Market Updates</p> <p>Monthly reports in PowerPoint format analyzing key competitive, regulatory and market developments over the previous month. (8 per year.)</p>
	<p>Analyst Note</p> <p>BDA Analysts from the Telecom, Handset and New Media Advisory Services comment on the most significant industry developments. (2 per month.)</p>
	<p>Analyst Access</p> <p>Our analysts welcome your inquiries. (2 hours per quarter.)</p>
	<p>BDA Subscriber Website</p> <p>Subscribers have unlimited access to the fully searchable database of over four years of BDA research available on our website.</p>

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