

Telecom**WORLD**

Congress

2010 Survey



Strategy and opportunity for the world's telecoms operators.

www.terrapinn.com/2009/twc

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Foreword

The telecoms sector continues to develop through a period of exciting and unpredictable change. The global economic slowdown has presented unique challenges as well as opportunities to the sector, which has a history of strong innovation.

From geographic growth opportunities to product innovation, from new customers to new technologies, the 2010 survey of the telecoms sector reveals where the sector itself believes it's key challenges and (more importantly!) opportunities to lie in 2010 and beyond.

I hope that you will find these findings interesting and useful to your business. They will be discussed and debated in depth at the annual **Telecoms World Congress to be held in Amsterdam from 20-22 April**. If you'd like more details please contact me and I'll ensure that you receive a copy of the programme when it's completed.

Yours sincerely,

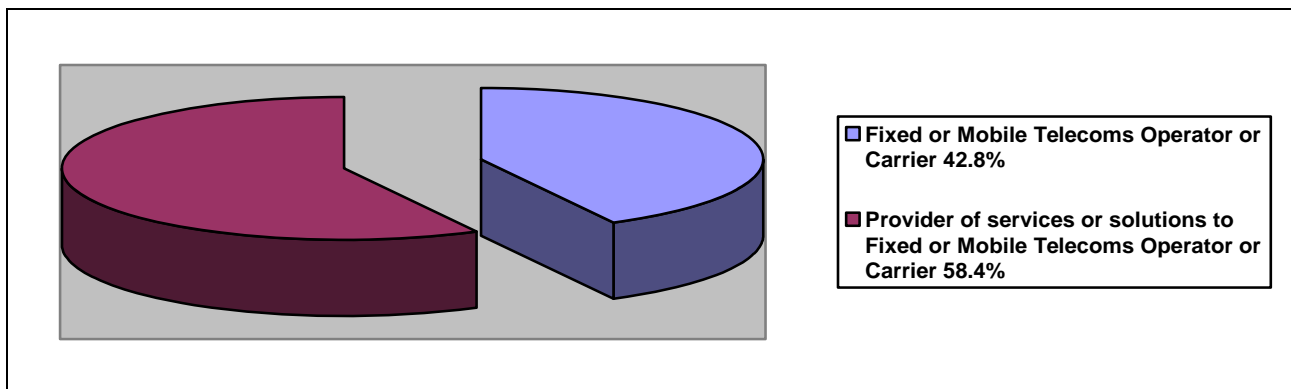


Enrique Schindelheim
Commercial Director
Terrapinn

Breakdown of Respondents

In total there were 269 survey respondents.¹ They were roughly evenly split between telecoms operators (fixed, mobile or carriers) and providers of services or solutions to telecoms operators. The breakdown is illustrated below:

Breakdown of Respondents by industry



¹ Of which 119 executives completed the survey.

Headline Findings

Finding ways to save costs the number one strategic challenge

71.1% of respondents indicated that “Finding ways to save costs” was their number one strategic challenge in the next five years.

We anticipate that this means subjects such as network sharing will become increasingly topical in the period to 2010.

Getting more from network infrastructure critical

59.8% of respondents indicated that in the next five years “**Getting more out of your network infrastructure**” was regarded as the top strategic opportunity for telcos operators in the next five years.

Growing the profitability of broadband vital

56.5% of respondents indicated that growing the profitability of broadband was the next most important strategic opportunity faced by telecoms operators.

Disruptive technology, cloud, seen as key influencers

54.5% of respondents indicated that “disruptive technology” remained for them one of the most interesting topics for discussion, while 45.5% of respondents wanted to know more about “Impact of Cloud Computing on the telecoms sector”.

Mobile phone operators future not secure

While mobile operators are absolutely desperate to avoid a future as “low-margin suppliers of dumb piping”², responses indicate that they have not yet secured the business models and customer relationships they need.

Availability of finance a key challenge

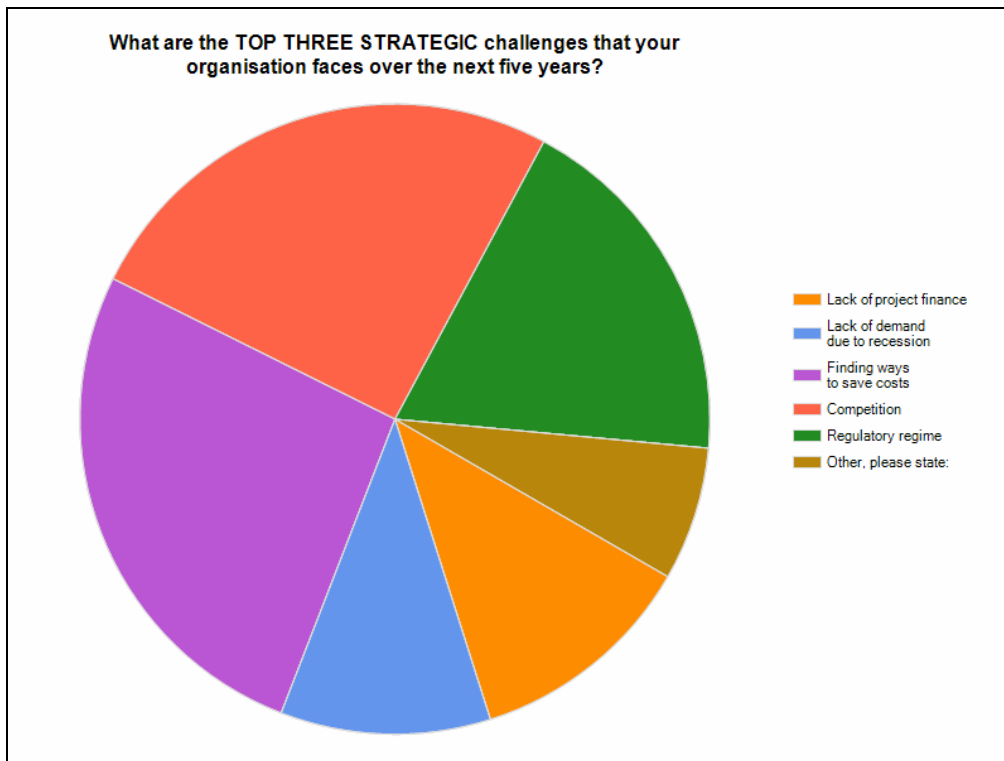
“Lack of project finance” is seen by more respondents (31.6%) as a key challenge than “lack of demand due to recession” (28.9%).

² US Mobile telecoms, FT Lex column, Published: August 3 2009, [Copyright](#) The Financial Times Limited 2009

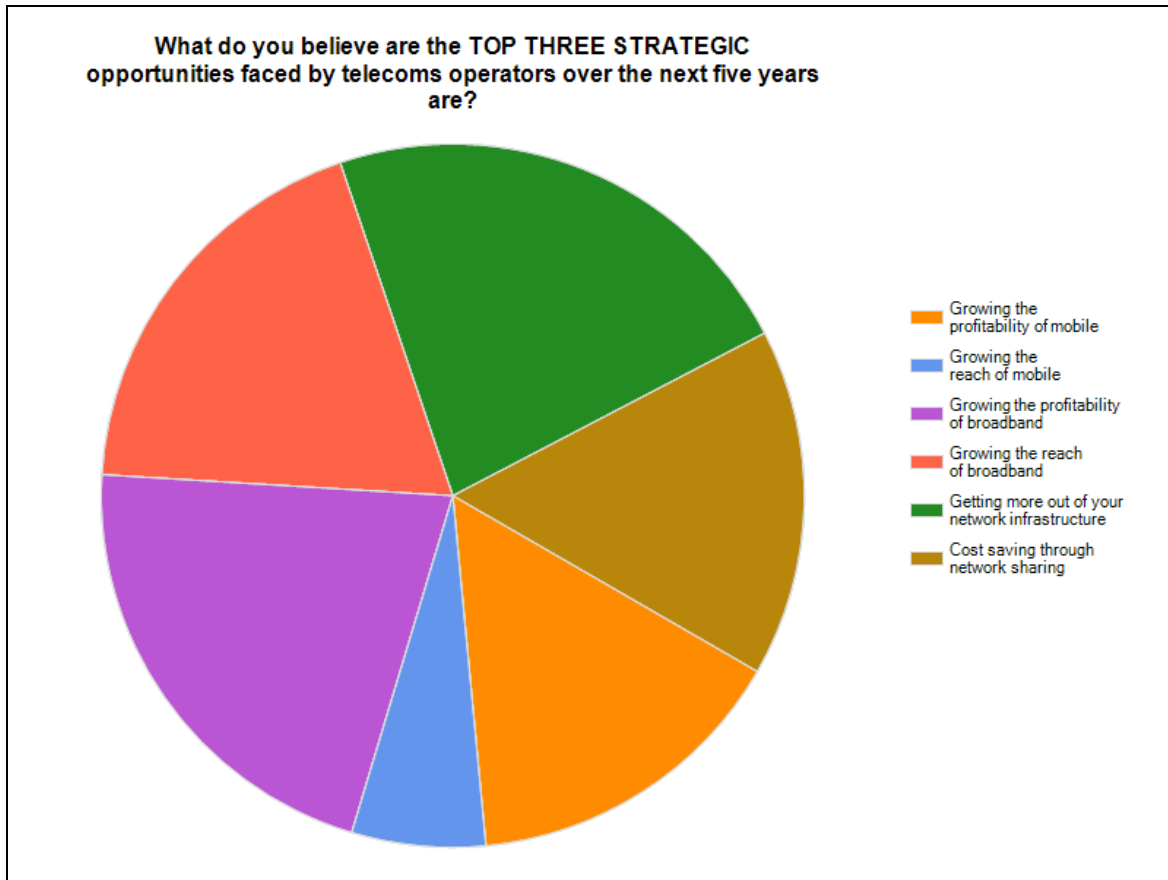
Survey Findings in Detail

Question 1 “What are the TOP THREE STRATEGIC challenges that your organisation faces over the next five years?”

Responses by telecoms operators:



What do you believe are the top strategic opportunities faced by telecoms operators over the next five years?



Issues of key concern to telecoms operators:

