

# 4GCounts Quarterly Report - Issue 7

## WiMAX & LTE Operator Deployment Tracking and Analysis Service



### ABOUT MARAVEDIS

Maravedis is the leading third party research and analysis firm focusing on broadband wireless technologies including WiMAX, 802.20, TD-CDMA, and LTE. Maravedis produces the best-value market reports in the industry. Maravedis also provides high quality consulting services to its customers, thanks to an in- depth understanding of the market, regulatory, and technology trends shaping the industry.

Maravedis has established itself over the years as the most credible and reliable resource for market intelligence in the broadband wireless industry. Maravedis works closely with equipment vendors, service providers, regulators, financiers, and other stakeholders to produce the MOST reliable analysis of emerging market trends, competitive analysis, and market forecasts.

*As the industry evolves, so too do our services. In the 4<sup>th</sup> quarter of 2008, WiMAXCounts.com changed its name to 4GCounts.com; we are now tracking both WiMAX and 3G+/LTE operators. 4GCounts profiles over 200 WiMAX and 3G+/LTE operators across 85 countries.*

Fourth Quarter 2008

## Executive Summary

2008 was an eventful year that impacted the broadband wireless industry considerably. One of the most important events was the definitive agreement signed between Sprint Nextel and Clearwire to combine their respective wireless broadband and WiMAX businesses. We saw the official announcement of XHOM by Sprint in September 2008, and later on in Q4 2008, the launch of “Clear” – the mobile WiMAX service brand resulting from the Sprint and Clearwire joint venture. 2008 also witnessed the acceleration of the LTE roadmap by its new champion, Verizon.

WiMAX's best promise remains in the hands of Clearwire. The first “Clear” mobile WiMAX market was Portland, where the subscriber uptake in the first two months more than doubled any of Clearwire's prior 47 market launches. Clearwire closed the year with 475,000 subscribers (all of them using proprietary equipment). The new Clearwire plans to launch WiMAX networks in 80 US markets, including 75% of the top 50, to provide coverage to 120 million people by the end of 2010.

LTE is gaining momentum and will be the technology selected by most mobile operators worldwide moving forward. Today nearly 450 operators are deploying or trialing WiMAX, and there are over 120 operators committed to LTE, including many CDMA operators. Not many WiMAX operators are committed to deploying LTE at present, although they are keeping an eye on the technology, aware of the impact it might have in the future. The introduction of LTE is too far down

the road to be adopted by many WiMAX operators at this point,, who are already investing large sums in the technology they have available today, and are taking advantage of the spectrum they already hold.

While there no LTE deployments or subscribers to report as of yet, Maravedis research indicates that more than 100 2G and 3G operators – both CDMA and GSM – have made a serious commitment to LTE. Indeed, LTE is expected to be the technology of choice for most existing 3GPP and 3GPP2 mobile operators looking to migrate to a next generation OFDM network. Maravedis anticipates that most LTE deployments will take place in late 2012 and early 2013. In the meantime, the 4GCounts service will be tracking mobile operators' LTE plans and strategies going forward.

At the end of December 2008, 4GCounts counted over 3.16 million BWA/WiMAX subscribers, a 15% growth from Q3 2008 and an 87% growth from Q4 2007. With a monthly residential ARPU of US \$43.84 and business ARPU of \$122.69, the worldwide subscriber base generated estimated quarterly revenues of US\$522 million. Residential subscribers (68%) continue to dominate the number of business subscribers (32%). North America represented the region with the highest residential customer base, closing out Q4 2008 with over 1 million subscribers of which 86% were residential and 14% business. These numbers are heavily weighted by Clearwire USA's residential broadband success and Inukshuk's (Canada) proprietary network.

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