The State of Telecom – 2010
Matching Supply and Demand for the Next Generation of Broadband

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Fixed broadband and mobile broadband
per 100 inhabitants of OECD, 2009

Source: ITU

Is Broadband at the Crossroads?

Global ICT developments, 1998-2009

Source: ITU Telecommunications/ICT Indicators database

Global telecom investment until 2030

Initial projections from:

Updated projections forthcoming in OECD Infrastructure Handbook, by Simon Forge, SCF Associates
Telecom infrastructure spend per year 2010-2030: Updated trend

Conclusions

Mobile broadband likely to be of increasing importance, not only complementing but substituting worldwide.

Mobile broadband likely to be of particular importance for areas with limited infrastructure, driving investment in non-OECD areas in particular.

Global investment will be impacted by cost reductions and global saturation of mobile broadband technology diffusion, with significant reductions in the post 2020 (see fig.)

What will be then be the next demand and investment boom?

Recall the "Geodesic Network Vision" from 1987, towards the "decentralized network"

Hypothesis: The network will be increasingly driven by end user investments, applications, machine to machine communications and networking, with mobile broadband driving investment in the post 2020 phase (not shown in previous figures).

But: Mobile broadband has negative impact on GDP? (See Thompson & Garbacz, 2010)