

USA - Telecoms, Mobile, Broadband and Digital Media Market 2017 - Market Size, Trends, Opportunities and Growth

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PUNE, INDIA, September 7, 2017
/EINPresswire.com/ --

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Executive Summary

USA's Mobile Operators Fast-Tracking 5G Developments

The US has one of the largest telecoms markets, which has given it a unique character based only regional licensing. Growth in the mobile subscriber base remains strong despite penetration levels of above 120%. Declining revenue from voice services is compensated for by high growth in mobile data use, itself supported by upgraded networks supporting LTE-based services. Smartphone penetration is also high, which also

encourages mobile data use among subscribers. A number of operators, led by AT&T, have partnered with vendors to trial 5G technologies and services. AT&T aimed to develop commercial 5G services by late 2018, which would make it one of the first carriers globally to do so. In addition, operators are working on the potential of NB-IoT, LTE-U and LTE-A technologies, in some respects as a precursor to 5G.

A major development in early 2017 was the complex reserve auction for spectrum in the 600MHz band, which raised more than \$19 billion. Although network operators must wait for spectrum allocations to be concluded, the additional 70MHz made available will go far to supporting mobile broadband in rural areas, and improving network capacity.

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This report provides analyses as well as key statistics and forecasts on the US mobile market,



including CTIA data for 2015, telcos' financial and operating data to Q4 2016 and recent market releases from the regulator. It also provides an assessment of telcos' strategies, regulatory policies, and developments in the deployment of emerging technologies. The report also reviews the cable, DSL, Wi-Fi, WiMAX and fibre broadband markets, providing analyses on regulatory measures and an assessment of the major fibre deployments in progress.

Key developments:

- AT&T expecting to provide 5G services by late 2018;
- FCC authorises the use of LTE-U devices in the under-utilised 5GHz band;
- AT&T planning national LTE-M services by mid-2017;
- FCC considers both low-end and high-end spectrum bands for possible 5G use;
- FCC concludes 600MHz spectrum auction;
- Comcast expands DOCSIS3.1 markets;
- Altice Group acquires Suddenlink Communications and Cablevisión, rebrands as Altice USA;
- New York state proposal for \$1 billion investment in broadband infrastructure, using state and private funds;
- Altice USA to deliver a 10Gb/s service across its footprint by 2022;
- Google Fiber puts on breaks;
- Report update includes company financial and operating data to Q4 2016, recent market developments.

Companies mentioned in this report:

AT&T, Verizon, Sprint Corporation, T-Mobile US, TracFone, MetroPCS Communications, Leap Wireless, Frontline, Alltel, US Cellular, Clearwire, Google, CenturyLink, Qwest, Frontier Communications, Windstream, Fairpoint, Cincinnati Bell, Comcast, HughesNet, ViaSat

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