

The top 20 global mobile operator groups by connections and revenue, Q1 2013

Chinese carriers continue strong growth; Egypt deal lifts Orange

China has consolidated its position as the world's largest mobile market, according to GSMA Intelligence's latest 'Scoreboard' operator ranking - as all three of the country's main carriers strengthened their positions from a year ago.

China Mobile remained the world's largest mobile operator based on connections and annual mobile revenue - strengthening its lead over second-placed Vodafone - while domestic rivals China Unicom and China Telecom both increased their ranking score from a year ago. China Unicom climbed two places to #5, surpassing Verizon Wireless (#6) and VimpelCom Group (#7), while China Telecom also increased two places to #11, jumping ahead of Deutsche Telekom (#12) and MTN Group (#13).

China Unicom and China Telecom were the only two operators in the ranking to post double-digit revenue growth. Annual revenue for the top 20 groups combined was down by 0.1% on the back of significant year-on-year declines at MTN (#13), Telecom Italia (#15), and Japan's NTT Docomo (#16) - though Vodafone (#2) was the only member of the top five to report a revenue decline.

In terms of connections, the top 20 groups combined increased their connections base by 6.4% year-on-year. Telenor (#14), Sprint (#17) and Sistema (#18) were the only three groups in the ranking to record a decline in connections from a year ago.

The largest shift in ranking position from a year earlier concerns Orange Group (formerly France Telecom), which climbed four positions to #8. This increase is the result of the group securing a majority share in Egypt's largest mobile operator Mobinil, which is now counted as part of the French group's total connections and revenue. Orange acquired 100% of a holding firm called ECMS that controls Mobinil in May 2012, lifting its total stake in the Egyptian operator from 36.36% to 93.92%.

Ooredoo (formerly Qtel) is another operator group that has seen its ranking increase on the back of M&A activity. Over the last 12 months, the group has taken control (a greater than 50% equity interest) in a number of its international subsidiaries, including Asiacell in Iraq, Nedjma in Algeria and Tunisiana in Tunisia. Ooredoo has increased 17 places in the latest Scoreboard as a result and now ranks just outside the top 20 at #21.

The ranking will also soon be affected by the proposed tie-up between US number-three operator Sprint and Japan's SoftBank. On a pro-forma basis, the combined operator (to be known as 'SoftBank Group') would rank #15 on the current Scoreboard - ranking #24 by connections and #6 by annual revenue. Sprint is currently ranked #17 and SoftBank at #28.

A note on methodology: The GSMA Intelligence 'Scoreboard' gives equal weighting to connections and annual mobile revenue in determining final positions. The ranking by connections and revenue is combined to give an overall 'score', with a lower combined score ranking higher. For example, Vodafone is ranked second by connections and fourth by revenue,

giving it a combined score of 6 (2+4). This ranks the group second on the Scoreboard behind China Mobile, which scores 2 (1+1), as it the largest group by both connections and revenue.

		Connections (millions) ¹	YoY Growth, connections	12mth mobile revenue (US\$B)	YoY Growth, revenue	Δ YoY
1	China Mobile	726.31	8%	90.44	6%	-
2	Vodafone Group	381.75	-	54.50	-8%	-
3	América Móvil Group	262.91	6%	34.53	9%	-
4	Telefónica Group	247.31	3%	46.84	1%	-
5	China Unicom	250.71	16%	21.03	17%	2
6	Verizon Wireless	114.45	5%	65.05	7%	-1
7	VimpelCom Group	211.86	4%	19.58	-2%	-1
8	Orange Group	140.20	28%	26.24	-7%	4
9	Bharti Airtel Group	259.84	7%	12.58	6%	-
10	AT&T Mobility	107.25	3%	59.68	4%	-2
11	China Telecom	168.03	19%	14.79 ²	21%	2
12	Deutsche Telekom	111.10	4%	33.37	-3%	-2
13	MTN Group	153.53	13%	13.96 ²	-10%	-2
14	Telenor Group	145.25	-2%	10.47	3%	-
15	Telecom Italia Group	103.09	3%	16.15	-10%	-
16	NTT DOCOMO	61.54	2%	40.31	-17%	-
17	Sprint Nextel	55.21	-2%	29.15	4%	1
18	Sistema Group	106.12	-8%	10.04	-	-1
19	Telkomsel	120.61	9%	5.56	3%	1
20	au (KDDI)	37.71	7%	19.65	-17%	-1

Mobile operator group global ranking by connections and 12-month revenue, Q1 2013

Source: GSMA Intelligence, company reports

¹ Connections are aggregated as the sum of each group's subsidiaries where a minimum of 50% plus one share economic interest is held

² Based on reported FY 2012 data