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OPERATORS FACE THREE PRINCIPAL PRESSURES IN 2013

The communications market is in revenue decline despite wider demand across the globe. Telecoms operators are facing a unique set of pressures as they attempt to compete against new players in a rapidly changing market.

1. **Defend traditional revenues**
   - Defend existing customers, products, and revenue streams from competition and substitution

2. **Transition to new platforms**
   - Build a foundation for future growth by replacing legacy infrastructure with next-generation technology to support new revenue opportunities

3. **Pursue new revenues**
   - Pursue growth opportunities to provide new revenue streams that offset declines in legacy areas and drive overall growth and profitability

Ovum’s 2013 telecoms research agenda addresses these fundamental market shifts. Our market data and analyst insight is focussed on supporting organisations across the communications value chain in making critical business and technology decisions.
OVUM’S INDUSTRY PERSPECTIVE

The telecoms market is in transition. Telecoms operators are facing revenue erosion in existing services, with revenues in many areas bypassing them completely.

In 2011 social messaging cost telcos $13.9bn, while OTT VoIP cost $22bn in lost revenue, which is set to double in the next five years. Telcos must offset this revenue decline with new value added services. The industry is moving from hardware-centric, single-sided business models to software-based, double-sided models, and incumbents must adapt their strategy accordingly.

To help industry players manage in a converging IT and telecoms market Ovum provides an integrated market perspective across communications, access, the internet and VAS services. We provide guidance as to how and when to integrate services and identify the new growth opportunities.

For 2013 Ovum’s analyst teams address the three key challenges that are being faced by telecoms operators [to DEFEND, BUILD, and PURSUE] through five major research topics. We also continue to address the regulatory environment and customer experience to provide the most comprehensive and relevant research agenda for all players across the telecoms market.

Ovum telecoms research agenda, 2013
Defending, growing, and managing communications and access

By 2015 over half of operators’ global mobile revenues will come from voice, with broadband access contributing a similar proportion of consumer fixed revenues. However, competition from other network and virtual operators is forcing prices even lower, while over-the-top (OTT) services threaten to bypass the operator completely.

In response, services and tariff differentiation and innovation will be key as operators seek to distinguish themselves from rivals. Delivering wholesale and retail services efficiently will be crucial to protecting margins, but smooth transition to new networks will be vital when migrating customers. New business models, such as network sharing, even call into question the importance of owning infrastructure, but reinforce the need for differentiation.

Migrating users to next-generation access networks

Failure to get the messaging, marketing, and tariffing right for next-generation fixed and mobile broadband networks will have huge implications for the business cases and financial performance of telcos

Published in 2013:
- Forecasts for fixed broadband; mobile technologies; mobile broadband
- LTE launch and fiber launch case studies

Tariff evolution and innovation

Understanding best practice and the critical success factors for packaging and presenting services to retail and wholesale customers has never been more critical.

Published in 2013:
- Bundling forecasts
- Innovative pricing strategies report
- Three studies on tariff evolution for mobile voice, quad-play bundles, and broadband pricing
- Four reports on tariff evolution and innovation

Service provider innovation

To demonstrate that they represent a sustainable and profitable business, telcos need to show innovation in their business models, propositions, service delivery, and support.

Published in 2013:
- Telco KPIs
- Vendor services trackers
- Innovation radars, analysis, and case studies for mobile services, and fixed services

Responding to the threat from OTT players

Companies making the largest impact on the telecoms market recently have been outsiders. It is vital for companies within the telecoms space to understand the strategy of these companies and how they get products and services to market.

Published in 2013:
- Strategic reports on how telcos can counter the OTT threat or use it to their advantage
- OTT trackers focusing on key areas such as communications and TV

Defending and managing traditional wholesale business

Wholesalers are taking a variety of different approaches to the decline in revenues and margins from their traditional wholesale services, including voice, IP transit, and long-distance capacity.

Published in 2013:
- Wholesale customer survey
- Wholesale service forecasts
- Report addressing strategies, tactics for retention and for targeting new opportunities

Strategies for wholesale differentiation

Wholesalers need to decide whether it is essential to own infrastructure if they are to differentiate their offerings and retain control over their services.

Published in 2013:
- Owning infrastructure, leasing it, or creating a hybrid wholesale platform
- Carriers’ evolving partnering strategies and tactics
- Six wholesale service provider case studies
Building a future-proof network

Service providers (SPs) spend billions on their communication networks to support and enable an evolving set of ICT services. Intense competitive forces; risks related to new service development and introduction; and uncertain demand on resources dictate a network strategy that is flexible enough today to support an unknown mix of services tomorrow. Network and service management intelligence is increasingly critical for optimizing physical asset utilization, improving customer experience, and monetizing offerings. Revenue pressure on SPs limits their capital and operational expenditure, which in turn exerts pressure on their suppliers.

Ovum's infrastructure research analyzes the market and highlights growth opportunities. Our ongoing network, service, and technology coverage is built on a data analysis foundation. The research spans components, systems, and SP spending and revenue analysis.

Mobile optimization and offload
Mobile service revenue growth is slowing, data traffic is increasing, and competitive pressures dictate continued network investment. But how do operators invest effectively? Published in 2013:
- Quarterly deployment trackers
- Programmability and virtualization in mobile networks report (e.g. SON)
- Three reports on mobile infrastructure trends and strategies
- Four network opportunity profiles (e.g. carrier Wi-Fi, small cells, macro cells, and mobile packet core)

Industry financials and their impact on investment
Ovum provides data and analysis to illustrate how spending and revenues shift due to macroeconomic changes and new technologies, regulatory and government initiatives, applications, and devices. Published in 2013:
- 40 components and systems share reports
- Infrastructure and component forecasts
- Monthly vendor contract trackers
- Vendor earnings, financial deals, capex/opex, and infrastructure value chain reports

Customer edge evolution
The network edge includes access, enterprise, and connectivity of wireless networks. We analyze the evolution of FTTx, the transformation of enterprise networks (datacenters and their connectivity), and emerging approaches to alleviating the wireless bandwidth crunch.

Wireline network optimization: monetization, programmability, and virtualization
 Operators' foundational revenues are under attack as mobile, video, and data traffic continues to climb. In addition, communications and IT are merging, which is raising the importance of data centers and IP. As a result, networks must be simplified, made more agile, and better support service monetization. Published in 2013:
- FTTx architecture survey
- Network opportunity profiles
- Reports on wireline virtualization, programmability, SDN, and policy management
- Data center, and cloud enablement reports

Technologies for 100G and beyond
Optical transmission is approaching the optical fiber bandwidth capacity limit. New technologies are required to improve fiber bandwidth utilization and increase its carrying capacity. Published in 2013:
- Transmission components for 100G and beyond
- Network opportunity profiles
- Reports on wireline virtualization, programmability, SDN, Distributed spatial multiplexing status
- TWDM PON assessment and outlook
- ROADMs: flexible grid, colorless, directionless, and contentionless?
Building successful platforms

Technology companies used to compete with individual products. They are now engaged in competing for every aspect of the consumer’s digital life – from devices to software, services, applications, and content. They must control all of these elements; otherwise they leave space for competitors to steal customers.

Success is dependent on building a powerful cloud-based platform that provides consumers with the computing and media experiences that they want, crucially, through a variety of smart devices (e.g. smartphones and tablets).

Ovum provides insight into how software platforms are being used by all players in the telecoms market and how they can leverage these platforms themselves.

Evaluating platform players and smart vendors

In Ovum’s ongoing mission to track and analyze the new market for mobile computing and smart devices, we have developed a new metric to measure the success of technology companies: the Consumer Tech Market Index. The index ranks each company and evaluates how it is performing by taking a holistic view of how complete a platform the company has, how many devices it is selling, and how successful it is at attracting third parties and consumers.

Published in 2013:
- Two half-yearly updates of the Consumer Tech Market Index
- Four company profiles of smart vendors featured in the index
- Four quarterly updates of the smartphone capability analyzer

New platform opportunities

As smart device and OTT players expand their platforms into new market segments, it opens new opportunities for those adept at leveraging these software platforms. It also provides a new addressable market for devices, applications, and services, and therefore for device vendors, service providers, and third-party developers. Within this topic, Ovum will focus on the “platformization” of the TV and the maturing smart-TV markets.

Published in 2013:
- Application development for smart TV survey

Smart-device forecasts

Ovum will size key smart-device markets, including mobile phones, smartphones, tablets, smart TVs, and other mobile Internet devices. The forecasts will allow clients to calculate the addressable market for key platforms such as iOS, Android, Windows RT, and Blackberry OS. The forecasts will cover each device’s installed base and be split by region and country.

Published in 2013:
- Mobile phone and smartphone market forecast
- Tablet market forecast
- Smart-TV market forecast
New opportunities in consumer services

Telecoms operators’ traditional consumer revenue streams continue to come under pressure. Even mobile services, the growth engine of the telecoms sector in recent years, is starting to see the first signs of market saturation and even decline in some areas.

OTT players are responsible for a significant proportion of this increasing pressure. Not only do they now provide credible competition, as many of their services are free, they can also completely change traditional business models. Service providers therefore need to alter their strategies to defend against such players, as well as use OTT services to seek out their own new revenue opportunities.

To achieve this goal, service providers will need to be more innovative, dynamic, and flexible than ever before.

The future of communications
Consumer communications revenues are the traditional cornerstone of telecoms operators’ businesses. However, voice communication isn’t valued as it once was, and even mobile operators are coming under increasing pressure. We explore how the communications market will evolve, how it will be monetized, and who the future key players will be.

Published in 2013:
- Mobile, fixed, VoIP voice, and messaging forecasts
- Making money from social messaging
- OTT communications tracker
- Consumer insights analysis

Payment strategies
The excitement around mobile payments is generating a lot of hype. However, this is clouding the fact that mobile payments are difficult to execute and have to overcome obstacles related to consumer and merchant acceptance before they can become a mass market proposition.

Published in 2013:
- Mobile payment market reports (mature and emerging markets)
- Mobile money business models, strategies, and user survey reports
- Mobile payment forecasts
- Mobile money case studies

Advertising and new business models
With increased competition from competitive service providers and OTT players, business models are changing rapidly. Although content is still highly valued by the consumer, increased availability and potential channels mean that it is increasingly hard to use it as a point of differentiation. While offering content and services for free has instant market appeal, few players can survive on a pure advertising-funded model.

Published in 2013:
- Advertising forecasts and strategic reports on the different advertising models
- Lessons learned: understanding business models
- Reports addressing personal data issues

Music and gaming
Although a lot of focus is placed on TV and video, there are plenty of other media opportunities open to service providers. Currently, music and online gaming are the second- and third-largest opportunities respectively within the media space.

Published in 2013:
- Digital music forecasts
- Digital gaming forecasts
- Key player case studies

TV and video
In terms of generating new consumer revenues, media provides one of the biggest opportunities in the short to medium term, with TV and video currently making up the largest portion of this market. As pay-TV is still largely a household service, it is a more natural fit for telcos than some other media services.

Published in 2013:
- OTT TV tracker and player positioning
- Multi-channel TV forecasts
- Consumer insights analysis
New opportunities in enterprise and wholesale

Cloud, mobility, machine-to-machine, global services, unified communications, and customer experience all represent exciting opportunities for service providers and vendors to grow value-added services and generate more revenues from the enterprise ICT market. However, in a market that is maturing quickly, and even commoditizing, it is critical to understand where and how to target resources.

Ovum’s Enterprise team covers the solutions and services that enable employees to interact with each other and with customers, the managed networks on which these applications and services are based, and the way that service providers are adapting to better meet the networking and ICT demands of businesses.

The telecoms operator’s role in enterprise cloud services

If there is one trend that has the power to transform the way that telcos and vendors serve businesses and the way that businesses consume ICT services, it’s cloud. In recent years, service providers have built infrastructure and software-as-a-service offerings based on their network and data center infrastructure. In 2013, Ovum believes that we will begin to see the impact of the full-scale rollout of unified communications-as-a-service.

Published in 2013:
- Telco-led cloud services forecast
- Survey: large enterprise demand for cloud services
- Data center strategies report
- Innovative cloud services profiles

The machine-to-machine (M2M) opportunity

Telecoms operators have embraced the M2M opportunity with vigor. There has been a stream of announcements about new partnerships, centers of excellence, and customer wins, and forecasts of very large numbers of connected devices have been widely quoted. While operators’ appetite for M2M has not diminished, most now have a realistic appreciation of their position in the M2M value chain.

Published in 2013:
- M2M forecast
- Operator vertical M2M application strategies reports
- The evolving M2M value chain
- How operators help customers become service providers

Managed and intelligent enterprise networks

Several telcos are beginning to see their network as “a platform”. While what this means may not always be clear, we expect to see more network services offerings featuring application acceleration, application-aware networks, and dynamic bandwidth allocation, self-managed through portals or managed by providers. Essentially, this is a manifestation of the cloud model applied to enterprise network access itself.

Published in 2013:
- IP-MPLS forecast
- Ethernet forecast
- Enterprise broadband forecast
- Emergence of network-as-a-service report
- Survey: enterprise demand for managed network services

Managing mobility and BYOD in the enterprise

Managed mobility may have got off to a difficult start a few years ago, but bring your own device (BYOD) has created the catalyst for enterprises to grapple with mobility on a strategic level that simply didn’t exist before. Operators are now developing more complete managed mobility strategies that include BYOD, with the goal of supporting multiple enterprises’ mobility deployment and management models.

Published in 2013:
- Enterprise-liable connections forecast
- Employee-liable (BYOD) connections forecast
- Three surveys on enterprise mobility procurement priorities
- Service provider managed mobility strategies reports
Telecoms in global IT services

The telco-led ICT services landscape has been evolving during a period of austerity. Enterprises are moving away from megadeals and the market is rebalancing, with tier-2 providers grabbing a bigger share of the overall ICT services opportunity. Ovum continues to track telco ICT opportunities through acquisitions, and to identify and evaluate telco strategies and capabilities according to vertical-sector focus and technology specialization. We cover how operators can position themselves to win more deals for IT-centric services.

Published in 2013:
- Global services deals analysis reports
- Service provider profiles highlighting ICT services strategies
- Global enterprise ICT procurement and ICT outsourcing survey

Unified communications and collaboration

Enterprises are revisiting unified communications (UC) strategies, investments, and plans. There are three main reasons why this is taking place: aging existing infrastructure, cloud, and mobility. Telcos are rolling out cloud-based UC. We expect many businesses, especially smaller ones, to embrace UC-as-a-service when presented with a utility model for consumption. The proliferation of mobile devices in the enterprise is providing CIOs with yet another catalyst for UC investment.

Published in 2013:
- UCaaS forecast
- Large enterprise unified communications and collaboration (UC&C) priorities survey
- UC&C user priorities survey
- Profiling telco UC strategies report series
- Visual communications report

SME opportunities

Service providers are keen to more effectively sell services to SMEs, either to increase revenues or reduce churn among small enterprise clients. However, SME markets are inherently national and highly fragmented so sales costs and channels must be optimized in order to profit. Ovum has been tracking SME services in major markets for three years, and will continue to do so, while adding a layer of analysis and commentary to help telcos fine-tune their strategies.

Published in 2013:
- Two bi-annual reports on key SME trends

New opportunities in wholesale

In the face of increased commoditization of traditional wholesale services, many carriers are developing more complex, innovative, and integrated services to offer to their customers. This involves developing relationships, exploring new customer segments, integrating OSS and BSS systems, and doing more to enable their customers’ businesses.

Global interconnection and interoperability of telco services is essential. However, newer telecoms services (such as VoIP, CDN, mobile payments, and video conferencing) still exist in vendor-specific islands. Wholesalers are well positioned to develop and provide hubbing services that facilitate integration.

Published in 2013:
- Innovation in wholesale report
- Opportunities for wholesalers in service hubbing report
- New wholesale opportunities in mobile report
- Comparative wholesalers’ service migration strategies report
Managing the regulatory environment

Services are now offered by more than just fixed and mobile telecoms operators, many of which sit outside the traditional reach of regulation. Policymakers are already keeping a close watch over these players as they disrupt traditional business models and become a more important part of consumers’ lives.

Our research will focus on how regulators strike a balance between competition and investment, how they will play a part in evolving business models, and how they will ensure that consumers continue to benefit from the innovation and reach that these new players have made possible. Ovum will explore both the immediate challenges the industry faces and those that are likely to emerge.

Benchmarking regulatory practice

National regulatory authorities often look to learn from each other when intervening in a market. Similarly, operators look to what has been implemented elsewhere when lobbying and responding to regulatory authorities. We will examine how regulatory frameworks have been implemented around the world and assess the level of regulatory effectiveness.

Published in 2013:
- 40 country regulation overviews
- One annual regulatory scorecard

Exploring developments in interconnect

Interconnect has traditionally accounted for a sizeable proportion of operator revenues. However, the use of standardized costing methodologies has exacerbated the downward trend in mobile termination rates, and some national regulatory authorities will be considering what alternative charging principles can be used once rates fall to fixed call termination levels. We examine what these could be, and consider interconnect in a next-generation network all-IP environment.

Published in 2013:
- Quarterly interconnect benchmarks
- Reports: The status of mobile termination regulation

Regulating current and next-generation networks

Fixed and mobile next-generation networks continue to dominate regulatory debate as significant investments are being made by both the public and private sectors. In the fixed market key questions include, how will access be granted to operators and on what basis? In the mobile market, where will additional mobile spectrum come from as the demand for mobile data continues to increase following 4G LTE rollouts?

Published in 2013:
- Quarterly wholesale broadband access benchmarks
- Bi-annual next-generation access tracker
- Ongoing tracking of spectrum awards

Adapting and responding to the emergence of OTT players

Traditionally, regulators have defined markets, identified dominance, and put in place remedies for telecoms operators. However, the industry is evolving and services are increasingly being provided by new players. How are regulators responding to this change and what is their role in promoting a sustainable industry?

Published in 2013:
- Cross-country analysis reports
- Analysis reports

Measures designed to protect the consumer

Tackling illegal peer-to-peer file sharing, new rules governing the advertising of broadband services, and guaranteed universal broadband access have all made the headlines recently. Along with a duty to encourage investment and ensure competition, how are regulators looking to maximize consumer welfare?

Published in 2013:
- Cross-country regulatory analysis reports
- Analysis reports
Customer experience strategies

Customer experience and cost reductions remain the focus areas for telecoms service providers today. If tackled correctly, these objectives are not mutually exclusive. Programs to improve customer experience encompass network performance as well as customer satisfaction. Faster product development and delivery, automation of business processes, online service delivery, and targeted digital marketing will move the telco towards a leaner, more agile, and cost-efficient infrastructure, while simultaneously improving the customer experience. If this is coupled with deeper personalization of services around the customer profile, the customer experience improves and the service provider has an opportunity to create a more sustainable revenue stream.

Customer experience management

Customer experience management (CEM) is the process of tracking a customer’s path through the experience lifecycle; integrating data from all interaction channels encountered across that lifecycle; integrating the view of that data across internal departments; using this holistic view to improve the revenues derived from customers; and measuring the results of business processes that attempt to monetize the customer experience.

Published in 2013:

- Customer experience strategy reports
- Social media monitoring market forecast
- Consumer and large enterprise customer experience survey

Contact center technologies

The contact center is at the heart of customer care for enterprises and it is therefore prudent for them to adopt a systematic approach to enhancements in performance, channel support and engagement, self-service, and reporting and analytics to successfully support a customer base where customer preferences keep changing.

Published in 2013:

- Forecasts for next-generation text-based customer channels; cloud contact center
- Ovum Decision Matrix: customer channels in the cloud
- Reports on contact center technologies

Customer experience strategies

The customer experience strategies underpinning many of today’s successful enterprises are carefully crafted across multiple stakeholders within each organization, focusing first on the business aspects and then translating these into technology investments and process optimization. Ovum undertakes interviews with executives from mid-sized and large enterprises across the globe.

Published in 2013:

- Customer experience strategies from the viewpoints of enterprises

Improving the operator's customer experience

Improving customer experience is one of the top three investment areas for telco CIOs. Applied correctly across the network and IT domains, it can help reduce the cost of operations and deliver an upside of faster revenue flow and greater customer loyalty.

Published in 2013:

- Leveraging customer data to improve the customer experience
- Four telco case studies on self-service portals
- Reports and profiles on vendor perspective of customer experience management
Pursue growth in a rapidly changing market

Ovum’s analyst teams possess an unrivalled understanding of the evolving market place and are uniquely qualified to provide strategic advice on how to respond to these changes.

- Annual market outlooks
- Evaluation of key industry issues
- 2020 market outlooks: longer term strategic insight

Quantify and forecast the market opportunity

Ovum provides the most comprehensive view of telecoms and new media, including the only integrated view across telecoms, IT and the internet.

- Over 50 market forecasts
- Infrastructure and market share for key technologies and services
- Market trackers – including: vendor contract database, HSPA & LTE deployment, mobile network sharing deals, NGA rollout, smartphone capability
- Benchmarks: interconnect and wholesale broadband access
Ovum provides in-depth analysis of the largest telcos and vendors, as well as focused enterprise and wholesale company profiles.

- **Company profiles:** top 30 telcos and top 10 vendors; specialist profiles in wholesale, devices and enterprise services
- **Ovum Decision Matrix:** company evaluation to support enterprise decision-making
- **Key player performance analysis:** telco KPIs, mobile phone vendors, telecoms vendors’ earnings and strategy

Refer to Ovum for leading buyer insight and analysis on consumers, enterprises, wholesalers, application developers, and telecom executive.

- **We survey** over 11,000 customers annually from across the communications value chain
- **Enterprise Insights:** SME and MNC primary research
- **Consumer Insights:** Consumer usage and attitudes
- **Service provider insights:** telecoms executives’ purchasing priorities
OVUM PROVIDES A 360 DEGREE VIEW OF THE MARKET

Ovum’s Telecoms practice teams address every aspect of the telecoms market. Our analysts have a wealth of industry expertise, founded in primary research, robust methodologies, and continuous engagements with industry stakeholders. It is this unrivalled breadth of coverage and depth of insight that ensures that Ovum is uniquely placed to provide actionable recommendations for decision-makers across the telecoms value chain.

- What do customers want and how do they view their suppliers?
- How should users and suppliers respond to the changing market?
- How is technology evolving and what is driving technology selection?
- What are the regulatory issues that are shaping the market?

Consumer

Michael Philpott
Practice Leader

Discover the key trends across the whole market, and understand how different types of players can maximize new revenue opportunities

Consumer communications revenue streams are continuing to come under pressure from market saturation, increasing market competition, and OTT disruption. In order to defend retail market share as well as locate new areas for revenue growth, service providers need to continually innovate around services, applications, and business models.

However, the monetization of services will become increasingly challenging. With an increasing number of disruptive players entering the market based purely on market exit strategies, service providers will need to be nimble if they are to head such players off while not completely cannibalizing their own markets. This will mean a greater reliance on partners and internal innovation.

Signature Research

The road to 2020: consumer – using Ovum’s research from the previous 12 months to plot progress, we examine whether the market expectations that we set out in 2010 have come true, or if the market has altered course.
Wholesale

David James
Practice Leader

Establish the changes in the market for wholesale services and how wholesale carriers should respond to them

No telecoms service provider is able to satisfy all of its customers’ requirements without relying on services bought wholesale from other service providers. The increasingly complex web of relationships necessary to enable modern retail services is highly dependent on the contributions of wholesalers.

While telecoms service providers have come to realize that the wholesale channel can be a valuable source of revenue, they need to understand how to cope with service commoditization of the services that they offer and how to differentiate themselves from their competitors.

Signature Research

Wholesale customer survey - our biennial qualitative survey of wholesale customers provides valuable insights into the changing needs of wholesale customers and identifies how closely wholesalers match up against them.

Enterprise

Evan Kirchheimer
Practice Leader

Understand how businesses interact with each other, their employees, and customers

Enterprise networking and communications remains a market in flux. Traditional suppliers face challenges ranging from new delivery models, such as cloud, to increasing competition from both new upstarts and established service providers with an IT heritage. Unified communications has evolved to include immersive video, and service providers are moving up the value chain to provide application services on top of the networks that they already manage. Our research addresses the managed and cloud communications services, evolving networks services, and enabling technologies.

Signature Research

Global Services Deals Analysis - key contracts for major global telcos, successful multinational deals, comparison of operators for MNC market impact, strategic developments and trends in verticals or geographies, and future market trends.

TCV share by vendor (N = $17.0bn)

- Telefónica 9.2%
- NTT Com 7.3%
- Orange Business Services 13.6%
- AT&T* 15.9%
- BT Global Services* 16.7%
- T-Systems* 16.7%
- KPN 3.5%
- Telstra 6.4%
- Level 3 1.5%
- Others 2.5%
- Verizon 18.0%
Telco operations

Establish the challenges and areas of business pain for telcos, their future business objectives, and the activities required to achieve them

Customer focus and cost reduction are the prime objectives for telecoms service providers. If tackled correctly, these objectives are not mutually exclusive – they are complementary.

Telcos need robust and realistic business cases to justify heavily scrutinized investment decisions. Greater use of automation and online service delivery move service providers towards a lean and cost-efficient infrastructure while simultaneously improving the customer experience. If this is coupled with deeper personalization of services around the customer profile, the customer experience improves and service providers have an opportunity to create a more sustainable revenue stream.

Signature Research

Self-service and telcos’ enterprise customers - analyzes how telcos are improving the enterprise customer experience through self-service options and customer dashboards.

Industry, communications, and broadband

Gain a converged view of the future telco across the entire fixed, mobile, and integrated communications marketplace

Telecoms operators inhabit an increasingly complex and challenging environment. They must deal with the rapid increase in data traffic (driven by the growth of video and multimedia applications) and the introduction of new technologies that are designed to allow them to carry this traffic profitably. At the same time, they must integrate disparate fixed, mobile, and broadband services to meet enhanced customer demands and satisfy investor, internal, and operational efficiency imperatives. Moreover, they must do this in the face of a slew of new competitors, potential partners, and disruptive technologies.

Signature Research

The global mobile and fixed market outlooks - set out “big picture” analysis of the key trends that are shaping the telecoms industry, and our views on the dynamics that will impact fixed and mobile operators over the next five years.
Customer experience and interaction

Gain insight into the technologies, services, and solutions that impact today’s customer experience lifecycle

Good customer service and high levels of customer satisfaction (net promoter scores) are products of efficient customer experience systems and processes. There is plenty here for the telcos to tackle, but chiefly they are looking at where they can provide customer flexibility and autonomy through self-care. The experience online, on the mobile, in retail stores, and via the call center needs to be integrated for the customer as well as for the customer service agent in order for tangible improvements to occur, to reinforce the customer relationship, and to maximize digital marketing opportunities.

Signature Research

Understanding Customer Experience Management – a look at CEM through the lenses of customer care, marketing/sales, and IT, with a series of interviews with over 30 enterprises to reveal the current dynamics of customer engagement.

Devices and platforms

Understand the impact that developments in mobile technology are having on consumer and business technology markets

We address the markets and players in smart TVs, mobile phones, smartphones, tablets, and other mobile Internet devices. At the center of our research is the rise of computer-style mobile operating systems, open cloud platforms, and the devices that are used to access them over the Internet.

These smart operating systems are the central control point for the delivery of services and third-party applications to customers on an increasing number of devices. Whoever controls the operating system essentially dictates terms to all related parties, including users, brands, developers, service providers, and content owners.

Signature Research

Smart-vendor scorecard - tracks and analyses the major players in the consumer technology market, and scores the completeness of their offerings and their influence.
Understand how infrastructure vendors can maintain service revenues from existing products while exploiting future opportunities

For service providers, network investments require an ongoing balancing act between supporting existing revenue streams while scouting out and supporting new ones. Similarly, infrastructure vendors must maintain their existing product and service revenues while executing plans to capture future opportunities.

We support both existing and future needs with analysis of network architecture, technology, and business strategy through a combination of hard data (e.g. market share, forecasts, and vendor, service provider, and deals financial analysis) and qualitative trend analysis. We gather primary data through interviews and surveys and interpret the results based on our experience in the telecoms industry.

Components

Establish the risks and promise of new component technologies and monitor the supplier and competitive landscape

Ovum’s research analyzes component-level approaches to supporting the bandwidth explosion. Demand in access, enterprise, and from mobile networks is driving up core network capacity requirements. Component vendors are challenged with delivering cost-effective FTTx, data centers, backhaul, and core network solutions.

Furthermore, the optical fiber capacity in the core network is approaching its theoretical limit. As a result, component suppliers must look to both improve the utilization of bandwidth and increase it. Numerous technologies are being developed to support these changes.
Policy and regulation

Understand the regulatory issues that are shaping the telecoms market and the impact that these have on strategies and revenues

The development of regulation shapes the future of the marketplace. As regulators intervene in markets, they advantage or disadvantage specific players and change market dynamics. They must strike an appropriate balance between maintaining competition while ensuring that investment in next-generation networks continues and intensifies. In doing so, they set rates for interconnection, local loop unbundling, and other forms of network access, which directly impact operator revenues. Understanding current developments and future directions in regulation is critical for success in today’s market.

Matthew Howett
Practice Leader
Signature Research

Ovum Consultancy

Engage Ovum’s analysts on a custom basis for advice that addresses your specific requirements

Ovum’s Telecoms Consultancy combines global experience with local market knowledge, allowing us to assist our clients with insightful analysis and strategy aligned to local market dynamics. We have experience working across all parts of the telecoms and interrelated ecosystems in both developed and developing markets, and frequently work with telecoms operators, service providers, governments and regulators, vendors, and investment banks.

Our Telecoms Consultancy draws upon the experience of our telecoms analysts and if appropriate our IT analyst colleagues, providing detailed market information and analysis coverage across a wide range of topics.
Ovum’s Telecoms Customer Insights survey program provides a flexible and cost-effective way for telecoms decision-makers to discover, understand, and act on changing customer attitudes across both consumer and enterprise markets.

The pace of change and disruption in the converging communications, media, and technology markets remains relentless. Users, both as consumers and employees, face and make decisions on an enormous array of new technologies and services. Some user shifts, such as social networking and smartphone adoption, have been incredibly rapid, while others, such as digital commerce and cloud computing, have been much more measured.

A unique approach to detecting customer changes

Ovum’s Telecoms Customer Insights program is designed to help service providers and technology vendors detect and address these changes in user behavior in the big issues facing consumers or enterprise buyers. Each topic in our Customer Insights program is addressed by a carefully designed set of questions that examine actions, perceptions, and changes in four areas:

- Social networking
- Smart devices
- Cloud computing
- BYOD
- Pervasive connectivity
- Digital commerce
- IP-based comms services
- Mobility

Customer Insights Consumer and Enterprise streams cover key topics across large representative samples in 15 countries globally.

A range of flexible options allows you to select the most appropriate Customer Insights package for your needs. You can choose to purchase just the survey data or to combine it with detailed Ovum analysis of the geography or topic addressed.

Find out how Ovum Customer Insights can help you

Contact us now to discover more about the countries and topics covered and how this program represents the most cost-effective method of collecting and leveraging customer insight.
Why Ovum?

Ovum has over 120 technology and telecoms analysts located across the globe, giving us global scope, but with a local perspective. In addition:

- Our expertise in both IT and telecoms allows for a unique perspective on a converging market
- Our recommendations are founded on robust and transparent methodologies
- Our analysis is driven by large-scale primary research and continuous industry engagement
- We have a commitment to independence, quality, and service in everything we do

About Ovum

Ovum is a leading global research and advisory organization specialized in ICT. With the most experienced analyst team in the industry, Ovum Telecoms is uniquely positioned to provide the insightful analysis needed to guide service providers, regulators and vendors through the significant transformation impacting the telecoms industry. Advising 9 of the top 10 service providers and 10 of the top 10 telecom vendors, Ovum Telecoms is the world’s leading source for research and analysis of the telecoms industry.

With independent and objective analysis, Ovum Telecoms provides our clients with insight which enables them to thrive on the evolution and convergence of the market.