Service Provider
2017 Research Agenda

Helping organizations thrive in a connected digital economy
Introducing Ovum

Ovum is a market-leading data, research and consulting business focused on helping digital service providers and their technology partners thrive in the connected digital economy.

The digital economy will be worth $4.8 trillion by 2025

Source: Ovum

Four critical market transitions

The digital economy is being transformed by new technologies, increased customer expectations and changing regulatory environments. To thrive digital service providers must navigate critical market transitions.

Consumer services
The transformation of consumer services by social, mobile, video and data driven technologies

• Wearables
• Smart home
• Connected car

01

Enterprise services
The migration of traditional on-site enterprise ICT to managed and cloud delivery models

• Cloud
• IoT platforms
• Unified commms

02

Infrastructure
The virtualization of infrastructure from physical to software-defined networks

• SDN / NFV
• LPMAs
• App. Virtualization

03

Industry
Vertical-specific market and technology implementations

• Financial services digital CX
• Payments blockchain

04

Ovum helps you successfully navigate these critical transitions

Our actionable insight supports your business, product planning and go-to-market initiatives.

Understand market dynamics

→ What is the disruptive potential of emerging technologies?
→ How are changes in customer demand impacting consumption?

Assess opportunities

→ How large is the opportunity and how is this forecast to change?
→ What is the local competitive and regulatory landscape?

Develop services

→ Which service elements resonate most with the market?
→ Which business and pricing models are most profitable?

Go-to-market

→ Which marketing and sales strategies are most likely to succeed?
→ What are the spending intentions of target customers?

Why Ovum?
We are uniquely qualified to help

Experience
We have been guiding our clients to growth for more than 30 years

Capability
We have more than 100 forecasts built with robust proprietary models

Approach
We have an in-depth market approach by vertical, technology and country

Ovum provides authoritative data, market analysis and vertical industry expertise to empower your decision-making. We help you profit from new technologies and evolving business models.

Working with Ovum puts at your disposal more than 140 expert analysts based in more than 20 locations across the globe. We place market leading analyst support at the center of all our services.

We are part of Informa Group

FTSE 100 Informa Group is one of the world’s leading providers of business intelligence. Informa has over 6,500 employees and delivers specialized information to companies operating in sectors including agriculture, commodities, energy and utilities, financial services, healthcare and pharmaceuticals, maritime, telecoms, media and IT.
# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing Ovum</td>
<td>2</td>
</tr>
<tr>
<td>Service Provider Research Programs</td>
<td>5</td>
</tr>
<tr>
<td><strong>Consumer</strong></td>
<td></td>
</tr>
<tr>
<td>Consumer Services</td>
<td>10</td>
</tr>
<tr>
<td>Consumer Technology</td>
<td>11</td>
</tr>
<tr>
<td>TV</td>
<td>13</td>
</tr>
<tr>
<td>Digital Media</td>
<td>15</td>
</tr>
<tr>
<td>Music</td>
<td>17</td>
</tr>
<tr>
<td>Payments</td>
<td>19</td>
</tr>
<tr>
<td><strong>Enterprise</strong></td>
<td></td>
</tr>
<tr>
<td>Enterprise Services</td>
<td>23</td>
</tr>
<tr>
<td>IT Services</td>
<td>24</td>
</tr>
<tr>
<td>Internet of Things</td>
<td>26</td>
</tr>
<tr>
<td><strong>Service Provider Markets</strong></td>
<td></td>
</tr>
<tr>
<td>Service Provider and Markets</td>
<td>30</td>
</tr>
<tr>
<td>Asia</td>
<td>31</td>
</tr>
<tr>
<td>Middle East and Africa</td>
<td>33</td>
</tr>
<tr>
<td>Europe</td>
<td>35</td>
</tr>
<tr>
<td>Americas</td>
<td>37</td>
</tr>
<tr>
<td>Regulation</td>
<td>39</td>
</tr>
<tr>
<td>Wholesale</td>
<td>41</td>
</tr>
<tr>
<td><strong>Service Provider Technologies</strong></td>
<td>45</td>
</tr>
<tr>
<td>Telecoms Operations and IT</td>
<td>46</td>
</tr>
<tr>
<td>Media and Broadcast Technology</td>
<td>48</td>
</tr>
<tr>
<td>Intelligent Networks</td>
<td>50</td>
</tr>
<tr>
<td>Optical Components</td>
<td>52</td>
</tr>
<tr>
<td><strong>Market Data and Forecasts</strong></td>
<td>54</td>
</tr>
<tr>
<td>Data Tools</td>
<td>55</td>
</tr>
<tr>
<td>Contracts Analytics</td>
<td>58</td>
</tr>
<tr>
<td>Market Forecasts</td>
<td>59</td>
</tr>
<tr>
<td>Market Forecasts Index, 2017</td>
<td>61</td>
</tr>
<tr>
<td><strong>The Complete Solution</strong></td>
<td></td>
</tr>
<tr>
<td>For Your Business</td>
<td>63</td>
</tr>
<tr>
<td>Knowledge Center</td>
<td>64</td>
</tr>
<tr>
<td>Deliverables</td>
<td>65</td>
</tr>
<tr>
<td>Consulting</td>
<td>66</td>
</tr>
<tr>
<td>What our customers have to say about us</td>
<td>68</td>
</tr>
<tr>
<td>Ask our analysts</td>
<td>69</td>
</tr>
</tbody>
</table>

Copyright © Informa PLC ovum.com
Service Provider Research Programs

For 2017 Ovum is launching four new research programs dedicated to delivering the insight necessary to help service providers and their vendor partners thrive in the transforming digital economy.

Consumer
Understand and prosper from the transformation of an ever-growing array of consumer services by social, mobile, video, and data-driven technologies

The rapid change wrought by connectivity, smart devices, and the cloud will only accelerate over the next decade as augmented and virtual reality, artificial intelligence, and other innovations drive the spread and influence of digitization in both new and existing consumer markets. Ovum forecasts global smart-home revenues alone will grow at a 59% CAGR from 2016 to 2020.

Our research program explores changing consumer priorities and habits, as well as the technologies transforming the market. It provides granular market data and forecasts to give a comprehensive view of service growth across traditional and digital delivery, and recommendations on the strategies and partnerships necessary to prosper.

Rob Gallagher
Research Director

Use this service to:
- Forecast the revenue for major consumer services
- Map the competitive landscape
- Benchmark your position with leaders and innovators
- Track and respond to the latest market pricing
- Follow consumer usage and attitudes
- Evaluate OTT opportunities and threats
- Track product launches, innovation, and partnerships
- Identify profitable emerging digital services

Enterprise
Profit from the migration of traditional on-site enterprise ICT to managed and cloud delivery models

Service providers are both competing against and partnering with an ever more complex ecosystem of vendors and platform providers in order to deliver new services to the enterprise. While the market for telco-led strategic global ICT services grew over 10% in 2015, leading systems integrators (SIs) have seen their business models challenged. However, SIs dominate discussions of transformation and digitization. In a more automated, cloud-based ICT world, the question is how they will profit from their industry experience.

With a sharp focus on changing enterprise buyer priorities, this research program helps service providers make better decisions when faced with changing technologies, competitive landscapes, and user and customer demands. It provides robust data to forecast services demand; surveys, insights, case studies, and reports to understand the increasingly sophisticated enterprise buyer; and trackers and deal databases to research and quantify sales opportunities.

Evan Kirchheimer
Research Director

Use this service to:
- Forecast the revenue opportunity for major enterprise services
- Identify new revenue opportunities
- Map the competitive landscape and develop offensive strategies
- Benchmark your position with leaders and innovators
- Follow SME and MNC ICT decision-maker and user usage and attitudes
- Understand your customers’ evolving demands
- Track product launches and innovation
- Identify best practice through case studies
Service Provider Technologies

Understand service provider adoption and spending on the core technologies enabling the delivery of new consumer and enterprise services

Over the next decade service providers will transform today’s networks into more flexible and agile systems capable of delivering the user experiences demanded by consumers and enterprise customers. A growing proportion of network functions will move from traditional hardware based systems to virtual, software centric implementations. Ovum forecasts that the market for CSP NFV products will reach $3.4bn in 2020 (108% CAGR from 2016).

Vendors serving the service provider industry need clear insight into these changes in order to understand service provider priorities for digital transformation, benchmark competitors, and track service provider spending and contracts.

Use this service to:
- Identify where service providers plan IT investments
- Identify decision criteria for selecting technologies
- Track plans for service provider technology deployments
- Evaluate your competitive position
- Learn about the new value chain
- Respond to competitor insight

Richard Mahony
Director of Service Provider Research

Service Provider Markets

Vital market intelligence to power your strategic and business planning for the contested and rapidly changing digital service markets

Service providers and markets are evolving rapidly as changing regulation and new digital disruptors drive adoption, growth, and competition between new and existing services. The prize is significant - Ovum forecasts that the global market for fixed, mobile, and pay-TV services will be $1.5 trillion by 2021.

To succeed you need both the top-down and bottom up views of how major trends such as IoT and OTT are playing out with major service providers in the world’s largest markets. Our data, forecasts, and analysis on fixed broadband, mobile, TV, and M2M in 200 countries now provides these integrated views, as well as data, forecasts and analysis on 5G, smartphone connections, portable communications, and more.

With in-market experts located in Asia, Europe, MEA, and the Americas we are uniquely placed to deliver the service provider, country, and regional insights necessary to help you develop and apply the most appropriate strategies in the converging telecoms, media, and digital markets.

Use this service to:
- Benchmark service provider services and results
- Understand the evolution of the world’s most important markets across mobile, broadband, TV, and M2M / IoT
- Gauge service provider innovation and disruption
- Assess the most important market developments by country
- Compare service provider strategies and market performance
- Evaluate the impact of regulation on service providers and markets
- Monitor wholesale service providers and markets worldwide
- Identify where service providers plan IT investments
- Identify decision criteria for selecting technologies
- Track plans for service provider technology deployments
- Evaluate your competitive position
- Learn about the new value chain
- Respond to competitor insight

Mike Roberts
Research Director

Service provider market intelligence coverage

- Europe
- MEA
- Asia
- Americas

- TV subscription, technologies, companies
- Fixed subscription, technologies, companies
- Mobile subscriptions, technologies, companies
- Market outlooks and regional analysis

Optical networking
Switching & routing
Access (FttX/4/5G)
OSS/BSS/NFV/Telco IT
ITC Services/CEM

Distruptive service provider technology
Service provider drivers
Vendor comparison
Changing CTO Behaviour

Use this service to:
- Evaluate your competitors’ customer bases
- Identify sales and partnering opportunities
- Pin-point service provider spend propensity
Only Ovum has forecasts for 250+ OTT service providers, including Google, Facebook, Amazon, Apple, Netflix, and WeChat.
Consumer Services

The rapidly evolving market for digital consumer services requires that both new and existing players have a nuanced understanding of where to collaborate and where to compete.

By 2020, there will be 2.6bn unique monthly active users of OTT communications apps, who will generate a total of 47.7tn text messages per annum.

On a global level, fixed voice and broadband revenues peaked in 2014. Worldwide mobile revenues continue to rise as the next billion become connected, but developed markets such as North America and Western Europe are already saturated. Telcos are therefore rapidly searching for new revenue opportunities created by the rise of the digital consumer.

However, OTT players, a diverse group of businesses using the Internet to deliver their services, are also looking to capitalize on such opportunities, and in many cases are better positioned to do so. Operators shouldn’t necessarily see such companies as a threat – often it makes better business sense to find common ground and work together.

Themes for 2017

Monetizing next generation digital communications
Changing consumer communications habits are driving developments in the types of messaging, voice, and video services they expect to access from both telcos and providers of OTT communications applications and services. Ovum assesses how they are evolving their communications offerings, with an emphasis on the identification and quantification of business models.

The smart home opportunity
The opportunities for the smart home are diverse and differ from country to country. Understanding what is the biggest opportunity in which markets is therefore essential to make sure investment is focused in the right areas.

Creating successful operator-OTT partnerships
Partnerships between operator and OTT players are now common in every region of the world. It is becoming clearer that some partnership models work better than others in order to benefit both parties. Ovum’s analysis, KPIs, and advice can help operators and OTTs understand how.

Consumer digital commerce
Digital commerce is undergoing profound change as disruptive players continue to shake up the market, while consumers expect more contextually relevant services. Ovum helps service providers identify value creation opportunities in the complex digital commerce ecosystem that spans payments, mobile money, advertising/marketing, and retail services. We deliver strategic insights into the competitive landscape on service trends, monetization, and consumer dynamics.

The growing importance of network operators to the entertainment industry
Given the bulk of entertainment spending growth is via OTT distribution, fixed and mobile network operators find themselves in an increasingly influential position. Operator entertainment strategies are proliferating as operators attempt to augment earnings with higher margin entertainment revenues.

Key deliverables
- OTT communications messaging forecast – providing global, regional, and country-level market sizing of mobile and fixed OTT communications users and messaging traffic.
- Smart home tracker – monitoring the products and services that will shape the smart home.
- Digital commerce in emerging markets report series – assessing drivers and barriers for digital commerce in emerging markets, including China and India.
- OTT communications tracker – historical KPIs and projections for key players including WhatsApp, Facebook Messenger and WeChat.
- TV and OTT market sizing & forecasting – identifying revenue growth opportunities globally.

What’s new?
- Smart home case studies – of the top platform providers including Apple, Samsung, Google, and Amazon.
- Social media tracker – providing KPIs and projections for the key social media and networking players.
- Cognitive commerce report – on how intelligent software agents impact digital commerce services and provide opportunities for value creation.
- Bundling tracker – on the evolution of OTT video / TV and fixed / mobile broadband bundling.

Copyright © Informa PLC ovum.com
Consumer Technology

As the golden era of the smartphone ends, the search for growth has brought a new breed of devices to market with a new set of use cases to monetize.

The smartphone market has reached maturity and will no longer provide the revenue growth prospects it once did. Competition will intensify and margins will be squeezed, urging manufacturers to launch new products such as wearables and VR headsets. Mostly supply-driven, these new segments have yet to prove their mass market potential, and require significant risk taking from consumer technology stakeholders. The long-term outlook for hardware-centric business models is bleak as consumer electronics gets further commoditized and devices become dumber, shifting advanced computational capabilities to the networks instead. Sustaining value in such an environment is a critical challenge for manufacturers. Human-like user interfaces, with voice and gesture recognition, consumer data, and virtual assistance are a few approaches that have begun to emerge. This will be massively disruptive for digital service providers, fundamentally changing the way entertainment will be consumed and shared.

The combined sales of wearables, VR, smart home, and drones will exceed 1.5 billion units by 2021.

What’s New?

- Consumer technology forecast database – covering relevant consumer tech segments (e.g. connected car, connected home, wearables, etc.)
- Extended connected car coverage – including forecasts, trackers, and case studies.
- Profiles/research notes on telco/vendor/OEM investment arms – such as Samsung Ventures, Intel Capital and Google Ventures.
- New Artificial Intelligence (AI) and Robotics coverage – including Virtual Assistance forecasts (e.g. Alexa, Siri, Cortana, etc.), robotics case studies, and drones forecast.

Themes for 2017

Converged device ecosystems
Consumer demand for services to work seamlessly across PCs, smartphones, tablets, TVs and other devices is driving the emergence of converged device ecosystems. We monitor and forecast multi-device ownership trends and corresponding platforms.

Disruptive technologies
From artificial intelligence to VR/AR and fitness tracking, use cases and applications drive the emergence and adoption of new consumer technology. We track disruptive technologies via case studies and predict their impact using our forecasting expertise.

Device economics
E-commerce companies like Amazon sell their own mobile devices and leading smartphone manufacturers like Apple provide their own payments platforms. We analyze how side business models and parallel industries affect traditional device and content value chains, and profitability.

Object ‘smartification’
The evolution of consumer electronics is shifting from the creation of new gadgetry to the ‘smartification’ of existing objects. Each segment obeys its own set of rules from replacement cycles to retail and maintenance demands, driving or inhibiting smart living adoption. We provide a unique converged perspective on the smart living device ecosystem by delivering all-in-one device forecast intelligence.

Key Deliverables

- Connected devices forecasts – covering handsets, tablets, wearables, VR, smart TVs, smart home devices, set-top boxes, and media streamers, with installed base and unit sales for a 360 demand-supply view.
- Wearable, VR, smart home and TV technology trackers – monitoring market dynamics and new technology launches in anticipation of market disruption.
- Strategic company profiles – for both large and small market players from a high-level holistic perspective, with in-depth market segment positioning.
- Technology roadmap assessment and forecast – for 4K UHD, HDR, 4G, 5G and eSIM, to help determine levels of maturity for service deployment planning.
As audiences fragment and viewing habits evolve, attracting viewers, subscribers, and advertisers is increasingly challenging for TV and video providers.

Commercial broadcasting revenues are under pressure as audience viewing habits fragment across a variety of platforms and services. Pay TV subscription growth is at best muted in the key markets of Western Europe and North America. OTT specialists in short form and live streaming are winning growing shares of viewing time, with monetization models that rely on huge audiences and low priced CPMs or subscriptions.

Audiences are willing to augment free or paid TV services with OTT services, invariably addressing needs for short form entertainment or on-demand catalogues, which were underserved by pay TV service providers. There are stark generational splits in viewing habits, with younger audiences skewing sharply towards short form, social video, and viewing on mobile handsets. The specter facing the industry in the longer-term is that we are raising audiences with completely different viewing habits to our own.

Using services from multiple providers creates a fragmented user experience, with multiple log-ins, billing cycles, UIs, siloed functionality (search, playlists, recommendations), and the need to launch new apps for different content. All of this indicates that there is much potential for companies to simplify and create more customer-friendly solutions that will drive growth.

“With 30m new pay TV customers and the same again for OTT SVOD expected by 2020, the next large scale global entertainment opportunity is China.”

Themes for 2017

A fragmented present
Audiences are collating entertainment sources from multiple providers, generally a combination of free or pay TV and multiple free and sometimes paid OTT services. It is critical to understand which services audiences are turning to and how traditional TV players are responding.

Bundling evolved
Companies can play a role in addressing fragmentation by investigating new bundles which incorporate services along with fixed and / or mobile broadband. Evolved bundling is still in the very early stages of development but represents a big opportunity for providers.

The importance of network operators
Given that the bulk of entertainment spending growth is via OTT distribution, fixed and mobile network operators find themselves in an increasingly influential position. Operator entertainment strategies are proliferating as operators attempt to augment earnings with higher margin entertainment revenues.

Key Deliverables

→ TV and OTT market sizing and forecasting – identifying revenue growth opportunities globally.
→ SVOD service subscriber sizing and forecasting – tracking Netflix, Amazon, and other key SVOD services progress in all key global markets.
→ Pay TV pricing benchmarking – helping you to fine tune competitive service launch strategies.
→ Evolving consumer behavior research – assessing evolving viewing and purchasing habits through primary research.

What’s New?

→ Pay TV pricing benchmarking – with expanding global coverage.
→ Bundling OTT video, broadband, and mobile – tracking the evolution of bundling.
→ UHD channel tracking and market impact – holistic analysis of UHD growth.

China SVOD vs. pay TV

OTT SVOD subscriptions - Pay TV subscription
Consumer adoption of digital content and services is rapidly evolving, but monetizing them remains a major challenge for players across the value chain.

Consumer appetite for digital content and services not only drives the wider market for access and devices, it is a trillion dollar opportunity in itself. Understanding the rapidly evolving dynamics of the digital media market is increasingly important for content creators, service providers, and technology vendors.

However, harnessing the appeal of digital services to deliver news, music, video, or gaming remains a major challenge. Revenues, whether via consumer payments or advertising, don’t always offset the cost of creating, licensing, and delivering the content. The market is made more complex by the fragmentation of content across multiple platforms and the dominance of a few global players. Our understanding and evaluation of the major trends and opportunities enables us to help companies identify opportunities for growth.

"The global digital media industry will generate revenues of US$1.14 trillion by 2021."

**What’s New?**

- The future of live video streaming – profiling the key players, with use cases and emerging ad formats that will dominate in 2017.
- Digital Advertising forecast 2016-2021 – sizing of the global ad market across different formats, covering over 60 territories.

**Themes for 2017**

**The dominance of video**

In 2017 the convergence of several major trends – the growth of global video services, the adoption of live video streaming, and the growth of VR content – will see video become the dominant form of content for both consumers and networks. Despite almost limitless demand, making money from it will remain a challenge.

**Monetizing apps**

As consumers shift to mobile devices to access content and services, the revenue generated by apps continues to grow. The games industry is leading the way with a multi-faceted approach to monetization via downloads, in-app purchases, and advertising. We evaluate this evolving market and identify the strategies to adopt.

**Monetizing digital content**

The appetite for digital media content and services continues to grow, but generating revenue remains a big challenge, especially as consumers choose increasingly to access them across multiple platforms. Companies delivering content must focus on better anticipating and meeting consumers’ needs to ensure they can create revenue from both advertising (in the face of widespread adoption of ad blockers) and consumer payments (amid the prevalence of free content).

**Key Deliverables**

- Video advertising forecast 2016-2021 – quantifying the market prospects for video advertising, including mobile, in over 60 countries.
- Mobile advertising tracker – capturing all the key developments and trends in the global mobile ad market.
- Virtual reality forecast 2016-2021 – assessing the opportunity presented by VR content, across over 60 countries.
- Mobile gaming forecast 2016-2021 – the market prospects for mobile games (including in-app monetization) in over 60 countries.
- Digital Media Opportunity Index: Asia Pacific – identifying new business prospects in key emerging markets.
Every sector of the music industry is looking to maximize revenue from the shift in consumption from ownership to access. Music content providers have adapted well to the rise in music streaming, with several subscription services registering growth in consumer uptake. However, revenue share remains an underlying problem, with record companies registering gains while authors and performers bemoan low earnings from access services such as Apple Music, Deezer, and Spotify.

The bundling of streaming services by telcos has boosted consumer uptake and interest in streaming. Telco involvement in music provision has quickly evolved from owned services to established service partnerships in order to entice more subscribers. The most successful streaming services have benefited by working with the subscribers themselves by offering discovery services, playlists, and artist-based radio channels to help them find the music they want to hear.

Listening to music is an essential activity for two-thirds of Internet users in Indonesia.

What’s New?

- Analysis of new music distribution initiatives – with a focus on consumer engagement through new technologies such as virtual reality and interactivity.
- Big data benchmarking – assessing how music companies are making the most of the data gained in the transition from ownership to access of recorded music.
- Music company market sizing – detailing addressable market sizes and the monetization of developing markets.

Themes for 2017

Music distribution; the ongoing transition

While most developed markets are registering gains from the transition from ownership to access, a proven business model for less developed markets is yet to be established. Ovum will continue to assess what works best in all markets, with case studies detailing successful service rollouts.

Following the money

Streaming may be changing the fortunes of the recorded music industry, but not everyone is benefitting. The often complex system of revenue distribution has thrown up a significant earnings imbalance. Ovum’s ongoing assessment of rights and royalties provides a detailed look at the origins and solutions.

Sizing emerging digital opportunities

Streaming has rapidly become a mobile-based sector, and mobile handset penetration is rising rapidly. However, the penetration rates of smartphones and other access technologies often causes confusion over addressable market sizes. We will continue to provide detailed market size assessments helping you establish the potential for growth.

Harnessing disruptive technology

Technology developments have always shaped recorded music distribution, but applications such as virtual reality and interactivity are attracting some of the music industry’s biggest players. Learn how both start-ups and some of the more established music company names are using technology advances to both expand their range of services and enhance consumer interaction with content.

Key Deliverables

- Recorded music industry forecasts – five-year forecasts of music retail sales broken out by physical and digital music formats and services.
- Music bundling tracker – a regularly updated dataset and assessment of telco/streaming service bundle deals and partnerships, with accompanying analysis of service success initiatives.
- Detailed country reports – examining all music industry sectors (recorded music, market shares, digital music transition, royalty collections, broadcasting, and live) in the top music markets.
- Rights administration analysis – of the major developments in copyright administration and digital music licensing.
Payment providers must remain relevant as new technologies, entrants, infrastructure, evolving customer needs, and changing regulatory frameworks disrupt the future value chain.

The opportunities that open APIs present to deliver entirely new products, services, and business models is an area that, along with SaaS, will dominate investment priorities in 2017. The ability to support the industry in delivering innovation, and new revenue sources, through partnerships with third parties will be critical for service providers.

Themes for 2017

Ecosystem evolution and emerging payments technology

As the industry ecosystem evolves and value chains fragment, flexibility in service delivery and the ability to easily support the next wave of value propositions will become essential. Open/external APIs will be an important catalyst of change, particularly in the retail payments space, where mandated by regulation such as PSD2. In addition to growth in the fintech space, this will open the door to a range of innovative services.

Investing in the building blocks for future payments innovation

Growing complexity in the industry will increasingly require modern and flexible systems and architecture to support growth. Major initiatives such as open APIs and immediate payments infrastructure, and new technologies like blockchain will be key drivers of investment in hub and switch platforms as well as customer facing systems. At the retail level, the role of tokenization in particular will be a focus.

Omnichannel commerce

The convergence of commerce around the mobile device and blurring of the distinction between physical and digital channels remains one of the biggest drivers of disruption in the payments industry. Merchant demand for contextually relevant customer experiences and greater international reach, alongside other added value services, will drive the agenda for acquirers, gateway, and processor business models. In particular, leveraging transaction data to drive new sources of value will be a critical focus area.

Identity, security, and the future of payments: from challenge to opportunity

The need to balance risk against convenience remains a key challenge in delivering innovation. The role that biometric and other identifiers play in payment authentication will increasingly turn the security experience into a business driver, while tokenization will increasingly come to define the winners and losers in the digital wallet space. Providers will also begin to explore the opportunity of turning identity management into a service.
Enterprise

Only Ovum has a dedicated research team on SoHo and SME ICT opportunities.
The enterprise ICT opportunity is a priority for most providers, establishing a coherent strategy while building, running, and scaling a profitable B2B business remains a considerable challenge.

Enterprise buyers are more sophisticated and demanding than ever. They want higher service levels across the network through to applications, reporting, integrated billing, and service management. At the high end, while more deals involve multiple services, ICT buyers are more open than ever to regional expertise and depth, preferring a “best in location” approach to service sourcing.

Between 2010 and 2015, Telcos more than doubled their sales of managed ICT services contracts into large enterprises and multinationals.
To enable digital transformation among their enterprise customers, providers must leverage the convergence of ICT services in network, infrastructure, applications, and business process.

The market for ICT services is at a peak of accelerated change and hyper-competitiveness. Transformation is at the center of customers’ agendas as they look to capitalize on new trends and services in cloud, mobility, and analytics. Seeking ICT Services providers with the right skills and services to deliver on their business goals, they have more choice than ever before. Providers are being forced to change their portfolios, business and service delivery models to keep pace. In this increasingly cut-throat market, our team’s research and advisory services provide insights on how to successfully market services to customers, compete to win, and partner for success.

There is a growing trust in IT services suppliers for digital transformation - fewer than 3% stated they would not engage with such providers, an improvement from 20% in previous years.

Themes for 2017

The modern ICT services provider
Digital transformation is forcing providers to shift their business models, go-to-market activities, and competitive positioning. They must move away from a one-dimensional cost arbitrage profile for services delivery, towards a three-dimensional model involving cost-savings, new skills, and innovation.

The partnering imperative
In order to succeed in the current market, ICT Services providers - telcos, network providers, SIs, and India-based firms – will need an effective ecosystem of technology, go-to-market, and innovation partners. Identifying, selecting, engaging, and managing those relationships is a process that is changing almost as quickly as the ICT Services market itself.

Modernization in the age of digital
For many customers, the modernization of infrastructure, applications, and business processes are critical first steps toward digital transformation. IT Services providers are putting modernization at the core of their transformation services for customers, with vertical-aligned paths in industries such as financial services, manufacturing, and public sector.

Automation and the services impact
Automation continues to have an impact on providers’ service delivery and labor arbitrage strategies, and concepts around cognitive automation could potentially reap huge benefits for customers in terms of leveraging data and business processes. The market is waiting for automation to become a core position in customers’ IT strategies.

Key Deliverables

→ IT Services Contracts Analytics - tracking every publicly announced outsourcing deal worth over $1m, including more than 23,000 IT services and BPO deals. See page 63.

→ IT Services Market Forecasts - a five-year view on growth in the IT services market, segmented by vertical, region, and IT services type.

→ Cloud Services Forecast - a detailed look at growth across various cloud services types by geography.
Alexandra Rehak - Practice Leader

Internet of Things

Beyond the hype, the development of the Internet of Things is driving significant disruption and new opportunities for service providers, vendors, and their industry partners.

The Internet of Things is the most disruptive wave of technology-driven change for business and consumer markets in a generation. IoT applications range from increasing efficiency in manufacturing and healthcare, to shifting the way people interact with cities, buildings, cars, and the environment. Many new service areas and use cases will emerge as the IoT spreads, disrupting industries and creating new revenue opportunities. Its impact on sustainability will also be far-reaching.

Cellular IoT connections will grow by 350% over 2016-2021, driven largely by NB-IoT adoption for low-power, low-cost use cases.

Themes for 2017

- **IoT ecosystems and value chain**
  - As the M2M market evolves into the new connected landscape of the IoT, ecosystems are developing around leading platforms, and verticals such as automotive, healthcare, retail, utilities, and transport. Industry players must consider which ecosystems are critical to be part of, which partnerships will be successful in driving innovation, and where to position in the value chain.

- **Vertical disruption**
  - Realizing the potential of IoT requires more than technology development. Understanding the transformative impact of the IoT on different industry verticals is a key challenge for all participants in the market. This includes understanding specific industry challenges IoT can help to address, and the disruptive impact of IoT on traditional business models.

- **IoT technology evolution**
  - The timeline for IoT technology development is constantly evolving, and solutions and services providers need to stay abreast of investments, deployments, standards, and ecosystems in order to ensure investment is going to the right places. The advent of LPWA technologies for both licensed (NB-IoT) and unlicensed spectrum (LoRa, Sigfox) is being closely followed by Ovum’s analyst team, as is the impact of 5G on IoT opportunities.

- **Horizontal platforms and capabilities**
  - IoT service providers and vendors are keen to develop horizontal solutions and platforms that can be deployed for many types of applications and industries. Best practice providers are building capabilities that extend the value of IoT solutions well beyond connectivity and devices, to gain the maximum value from IoT data. Leveraging assets and capabilities in cloud, analytics, artificial intelligence, and machine learning – whether through own development or through partnering – will be critical.

**Key Deliverables**

- **Global IoT Forecast 2016-2021** – forecasts for connections and revenue across 10 verticals, 5 key technologies, and 19 countries.
- **IoT Trackers** – ongoing tracking of M2M and IoT service provider contracts, platform deployments, and innovation investment.
- **IoT Framework and Trends Reports** – cutting through the hype, an up-to-date overview of the IoT landscape, value chain, outlook, and opportunities.
- **Regular profiles and case studies** – of leading service provider and vendor IoT strategies.
Service Provider Markets

“Only Ovum has research teams in the Americas, Asia, Europe, and MEA delivering analysis, data and forecasts on hundreds of service providers and markets.”
High-speed broadband technologies are moving into a growth phase, but communication service providers are still searching for ways to win consumer minds and sustain profitability.

Increasing competition, voice and messaging cannibalization, and rising costs are challenges that mobile and fixed broadband operators are successfully managing. Operators must continue to pursue incremental revenue opportunities by applying innovative data tariff policies and next-gen multi-play strategies.

Sensible pricing, coupled with innovative add-on opportunities (e.g. top-up data or value-added content) is helping to upsell customers to higher ARPU packages. Local content, sports rights, and OTT partnerships continue to act as a differentiator, and when zero-rated (subject to regulation) can attract first-time data users to networks.

SP&M’s range of qualitative and quantitative tariff products can help operators identify new data monetization strategies and trends, including best practice loyalty strategies and competitive new bundles. The most frequently invested service innovations will guide operators’ resource allocations and drive revenues and differentiation.

Themes for 2017

Innovative pricing
Finding new and better ways to monetize data through tariff innovation will be a key theme for 2017. With product differentiation a challenge, the importance of tariff innovation will continue to increase as a means for operators to eke incremental revenue from consumers. We believe that a sensible tariff strategy can increase key KPIs, including data revenue and data ARPU.

Broadband disruption
Fixed and mobile operators need to evolve their business strategies around new technologies such as 5G, the evolution of 4G, bonding, fiber, and G.Fast. In 2017 we will continue to focus on the ways traditional telecoms operators and cable companies can defend and evolve existing strategies. This includes assessing new tariff bundles beyond the traditional triple or quad play and gigabit broadband technologies.

Future operator strategies
As operators continue to carve out their place in the Digital Economy, Ovum looks at the broader landscape of what is and isn’t working in terms of service innovation, retail strategy, and the future of voice and Wi-Fi in the traditional operator arena. We will consider whether new opportunities present an incremental revenue opportunity for operators, and continue to investigate how they can monetize their networks in new ways, through next-gen MVNO and other strategies.

Key Deliverables

→ How operators innovate report – evaluating how operator innovation has changed since our last series update in 2012-13.
→ Broadband Pricing Interactive Tool – analyzing quantitative tariff data (e.g. median tariffs.)
→ Pricing Innovation Radar – with new tariff initiatives rated based on significance and uniqueness.
→ Pricing innovation case studies – drilling down into tariff innovations that have worked, and why.
→ Disrupter case studies – assessing how challengers have disrupted the market, and what this means for remaining operators.

What’s New?

→ Next-gen bundles – investigating the rise of innovative new bundles, including quint plays, and the multi-play monetization opportunity.
→ Wi-Fi calling forecasts – identifying the current and five-year impact of native dialer based Wi-Fi Calling services on operators.
→ MVNO Case Studies – assessing the growing MVNO market of highly sophisticated operators that differentiate on more than just price.

Social data plans now account for 26% of all new price innovations.
Operators in Asia face the combined challenge of slowing or stagnant subscription growth, continued core product commoditization, and intensifying competition from both traditional and next-gen players. It’s not just rules of the game that are changing, but the game itself, and maintaining revenue growth will be a huge challenge. The transition to a digital environment sees consumers freely accessing content and services from a seemingly infinite number of companies, many dominating traditionally telco related areas like messaging. The proliferation of platforms and devices meanwhile further complicates operators’ understanding of customer usage habits and digital consumption trends. Messaging, video, gaming, and music are just a few of the areas where forays are being made into new media and digital.

In enterprise markets service providers must consider how best position themselves if they are to capture emerging opportunities across various verticals. Despite some progress, with particular impact in automotive and financial services, for more can be done by telcos, especially when coverage and capacity gains are utilized to support innovation. As operators try to break free from legacy technologies, processes, and mind-sets, they must also learn to simultaneously compete and collaborate with incumbent players from different markets.

Themes for 2017

Digital services and diversification
As the Asian telecoms market matures, operators and industry players seek to develop new data-based and digital services. We assess these strategies and sectors, with case studies and analysis around digital media, M2M, and FMC services. Ovum’s data and reports cover market segmentation, pricing and packaging, marketing campaigns, CRM, and retail strategies.

Redefining service providers
The impact of internet and OTT players has been huge in Asia across its frontier, developing, and industrialized markets. A common trend has been for service providers to reach scale at home, then spread rapidly across other regional markets. But why have some brands succeeded and others failed? And who are the service providers of choice for connected vehicles, smart-homes, and connected objects in the region? Ovum closely monitors new service providers through regular analysis and case studies, tracking the providers of choice for connected vehicles, smart-homes, and connected ‘things’ in the region.

Network strategies
The industry continues to face a complex range of network issues and decisions. Topics such as next-gen LTE, 5G, new M2M and IoT networks, fiber for ultra-broadband deployment, and network strategies for rural and remote areas must be addressed. Ovum’s Asia channel will address these topics through comprehensive analysis and case studies.

Marketing strategies
Asian telco encompasses a broad mix of markets, from high growth frontier to advanced and developed. Its mega-cities’ populations alone rival major markets in other regions. The variety of operator marketing strategies reflects this scale and diversity. Ovum’s analysis covers market segmentation, pricing and packaging, marketing campaigns, as well as CRM and retail strategies to help you stay ahead of the competition.

Service provider & market benchmarking
Market watchers need to know which of the world’s leading service providers are winning and losing, and why. Ovum provides regular performance benchmarking of the major service providers and regional markets through analysis and comparison of KPIs over time.

Key Deliverables

→ Country reports – provide analysis, data, and forecasts on the main segments in the largest countries in the region.
→ Service provider updates – Data and analysis on the major operating groups in the region.
→ Data and forecasts – detailing the rise and fall of key market segments.
→ Case studies – Detailed analysis of the key services and strategies in the market.
→ Topic reports – Understand the key themes playing out in the region.
→ Regional market outlooks – Analysis, data, and forecasts tell the story of Asia’s current performance and future outlook.

What’s New?

→ Country and region outlook reports – The outlook for the industry in major countries and the overall region, based on analysis of Ovum’s integrated industry forecasts.
→ Region quarterly updates – Analysis of the quarterly results and performance of the largest service providers in the region.
→ Consumer Insights reports – Consumer survey research and analysis for major markets in the region.
→ Market trackers – Quarterly market trackers on major market developments including 5G, IoT, LTE and VoLTE

Asia’s mobile broadband subscriptions have hit the 46% mark in 2Q16 and is trending for 50% by year’s end.
As growth in the regional market slows, MEA service providers must strive harder than ever to win and retain customers, and develop new services.

The high rates of growth, particularly in mobile subscription numbers, that used to characterize MEA telecoms markets have fallen significantly. As in other regions, the established business lines of voice and SMS are in decline at most telecoms operators. Data access and data revenues are growing strongly, but the growth is from a low base in many cases, and providing data connectivity requires substantial investment. Some markets in the region are leaders in mobile financial services, particularly mobile money transfer, but are leaders in mobile financial services, investment. Some markets in the region are leaders in mobile financial services, particularly mobile money transfer, but although sub-Saharan Africa, by contrast, incorporates some of the world’s least developed markets.

Political, economic, and infrastructure difficulties affect substantial parts of the region. Additional complexity comes from the vast and varied nature of the MEA region. The Middle East is comprised of some of the most-developed countries in the world, whilst sub-Saharan Africa, by contrast, incorporates some of the world’s least developed markets.

The number of mobile broadband subscriptions in Africa will cross the one billion mark during 2021, to reach 1.02 billion at end-2021.

Themes for 2017

Digital services and diversification
As the MEA market matures, service providers and others in the industry are increasingly looking to develop new, data-based or digital services, and invest in new growth opportunities. We assess digital-service strategies and sectors such as digital media, e-commerce, and mobile financial services, through case studies, analysis, and data.

Redefining service providers
OTT players have carved legitimate roles as communication service providers, but new areas of communication, access and entertainment services are being contended between established telcos and new service providers. Who will be the service provider of connected vehicles, smart-homes, and connected objects in the region? Ovum closely monitors the key providers through regular analysis, case studies, and trackers.

Network strategies
The MEA telecoms faces an increasingly complex range of network issues and decisions. Topics such as the deployment and development of LTE, the introduction of VoLTE, preparations for 5G, new networks for M2M and IoT, fiber broadband deployment, and network strategies for rural and remote areas must be addressed. Ovum’s MEA service will address these topics through data, forecasts, and deep analysis.

Marketing strategies
The MEA market is increasingly competitive, products and services are ever more complex, and overall growth rates are slowing. Winning new customers whilst retaining your existing ones, and developing new business with them, is harder and more important than ever. Ovum’s MEA analysis covers topics such as market segmentation, pricing and packaging, marketing campaigns, CRM, and retail strategies.

Service provider & market benchmarking
Market watchers need to know how the world’s leading service providers and markets are performing – who’s winning and losing over time and why. Ovum provides regular performance benchmarking of the major service providers and markets in the region through analysis and comparison of KPIs over time.

Key Deliverables

- Country reports – provide analysis, data, and forecasts on the major segments in the largest countries in the region.
- Service provider updates – Data and analysis on the major operating groups in the region.
- Data and forecasts – detailing the rise and fall of key market segments.
- Case studies – Detailed analysis of the key services and strategies in the market.
- Topic reports – Understand the key themes playing out in the region.
- Regional market outlooks – Analysis, data, and forecasts, telling the story of the region’s current performance and future outlook.

### What’s New?

- **Country and Region Outlook Reports** – The outlook for the industry in major countries and the overall region, based on analysis of Ovum’s integrated industry forecasts.
- **Region Quarterly Updates** – Analysis of the quarterly results and performance of the largest service providers in the region.
- **Consumer Insights Reports** – Consumer survey research and analysis for major markets in the region.
- **Market trackers** – Quarterly market trackers on major market developments including 5G, IoT, LTE, and VoLTE.
Europe

As Europe’s TV, fixed, and mobile services converge into a single market, geographic borders blur and entry-barriers are lowered, accelerating the move to digital services.

Europe is at a new inflection point. For the first time in almost a decade, revenues stopped declining in 2015 and returned to moderate growth in 2016. There are new opportunities for additional revenue growth in the 2016-2021 period, with super-fast NGA networks being a key driver. However, providers must do more if they’re to transition successfully to digital services. Implementing data-monetization services for their enterprise customers and becoming an essential provider of multi-layered services for European consumers will be critical. 2016 will be a year of transition, as European service providers shift from a generalist to multi-generalist positioning, taking more assertive efforts into TV and connected-spaces sectors, but also other adjacent verticals such as payments and the automotive sector. In the long term, “consumer” and “enterprise” as we know it today will be just one of the many verticals in which Europe service providers operate. This will only be achieved by carefully combining homegrown, in-partnership and acquisition-based innovation for human-enhancing and things-enhancing solutions.

Themes for 2017

Digital services and diversification
As the European telecoms market matures, operators and others in the industry are increasingly looking to develop new, data-based or digital services and invest in new growth opportunities. eSIM based consumer devices will be a key area of research. We assess digital-service strategies and sectors such as digital media, M2M, and FMC services through in-depth case studies, analysis, and data.

Redefining service providers
OTT players have carved legitimate roles as communication service providers, but new areas of communication, access, and entertainment services are being contended by established telcos and new service providers. Who will be the service provider of connected vehicles, smart-homes, and connected objects in the region? Ovum closely monitors the key providers through regular analysis, case studies, and trackers.

Network strategies
The European telecoms industry faces an increasingly complex range of network issues and decisions.

Key Deliverables
→ Country reports – provide analysis, data, and forecasts on the main segments in the largest countries in the region.
→ Service provider updates – Data and analysis on the major operating groups in the region.
→ Data and forecasts – detailing the rise and fall of key market segments.
→ Case studies – In-depth analysis of the key services and strategies in the market.
→ Topic reports – Understand the key themes playing out in the region.
→ Regional market outlooks – Analysis, data, and forecasts, telling the story of the region’s current performance and future outlook.

40% of Europe Telcos are back into revenue growth; consolidating the trend will require careful but assertive leaps into new value chains.
Americas service providers must rapidly develop new strategies and services as core segments mature and converge, and competition intensifies with the expansion of digital services.

Americas service providers face stark choices as traditional markets mature and digital transformation accelerates. While traditional wisdom holds that companies need to protect traditional segments in order to fund innovation and growth in new areas, getting the balance right is more art than science and requires a detailed understanding of how markets are trending in relation to each other. Are the mobile, fixed broadband and pay TV markets still growing in the Americas? If so, why are they growing, where are they growing, and which service providers are driving the growth?

Service providers also need to know how quickly new segments are emerging and how to capitalize on them, whether via partnerships, acquisitions, direct investments, or a combination. How fast is the Internet of Things growing in major markets in the Americas, and which service providers are leading the way? Do telcos players have a realistic chance of competing against Google, Facebook, and others for a share of digital advertising revenues, or should they focus on other areas?

These are questions service providers need to answer as their markets transform from the traditional silos of the telecoms and media world to more connected and converged digital services. Will telcos giants such as Verizon, AT&T, Telefonica, and America Movil play a leading role in the digital world or will they be outflanked by the speed and global scale of Internet service providers? Only those with a detailed understanding of traditional and digital markets can answer these questions and create the right strategies and services to succeed in the midst of market transformation.

### Themes for 2017

#### Digital services and diversification

As the Americas market matures, operators and others in the industry are increasingly looking to develop new, data-based, or digital services and invest in new growth opportunities. eSIM based consumer devices will be one area of research. We assess the major digital-service strategies and sectors, such as digital media, e-commerce and mobile financial services, through case studies, analysis, and data.

#### Redefining service providers

OTT players have carved legitimate roles as communication service providers, but new areas of communication, access, and entertainment services are being contended by established telcos and new service providers. Who will be the service provider of connected vehicles, smart-homes, and connected objects in the region? Ovum closely monitors the key providers through regular analysis, case studies, and trackers.

#### Network strategies

Americas service providers face a complex range of network issues and strategic decisions. Topics such as the deployment and development of next-gen LTE, 5G, new networks for M2M and IoT, fiber for ultra-broadband deployment, and network strategies for rural and remote areas must be addressed. Ovum's Americas channel will address these topics through data, forecasts, and analysis.

#### Marketing strategies

The Americas market is increasingly competitive, products and services are ever more complex, and overall growth rates are slowing. Winning new customers whilst retaining your existing ones, and developing new business with them, is harder and more important than ever. Ovum's Americas analysis covers topics such as market segmentation, pricing and packaging, marketing campaigns, CRM, and retail strategies.

#### Service provider & market benchmarking

Market watchers need to know how the world's leading service providers and markets are performing – who's winning and losing over time and why. Ovum provides regular performance benchmarking of the major service providers and markets in the region through analysis and comparison of KPIs over time.

### Key Deliverables

- **Country reports** – provide analysis, data, and forecasts on the main segments in the largest countries in the region.
- **Service provider updates** – Data and analysis on the major operating groups in the region.
- **Data and forecasts** – detailing the rise and fall of key market segments.
- **Case studies** – Full analysis of the key services and strategies in the market.
- **Topic reports** – Understand the key themes playing out in the region.
- **Regional market outlooks** – Analysis, data, and forecasts, telling the story of the region’s current performance and future outlook.

### What’s New?

- **Country and region outlook reports** – The outlook for the industry in major countries and the overall region, based on analysis of Ovum’s integrated industry forecasts.
- **Region quarterly updates** – Analysis of the quarterly results and performance of the largest service providers in the region.
- **Consumer Insights reports** – Consumer survey research and analysis for major markets in the region.
- **Market trackers** – Quarterly market trackers on major market developments including 5G, virtual reality, and more.
New and emerging players have not only competed away traditional revenues, but are forcing regulators to reassess how they intervene in the market.

Typically regulators have focused efforts on regulating now-familiar access bottlenecks. As new players enter the market in direct competition with telcos and the balance of power shifts, policy makers are increasingly wondering how to respond.

Should the OTT players be regulated, or should telcos instead see deregulation of their traditional areas of business? Does it make sense to apply traditional remedies and impose burdens on these new services, or have they made the market competitive enough for regulators to roll back regulation on telcos? Realities suggest that a middle path is probably the proportionate response. Regulators are preparing new interventions to ensure consumers continue to benefit from innovation, and that fair competition can flourish.

Regulators have never faced so many challenges, as operators increasingly bundle fixed, mobile, and TV services together.

What’s New?

→ Spectrum awards database - an interactive tool to benchmark spectrum awards across globally harmonized bands.
The commoditization of many traditional wholesale services is forcing carriers to diversify their portfolios and explore new channels to market. No single communications service provider (CSP) will be able to serve its customers without wholesale bought connectivity hosting and other services and solutions. The efficient interworking and interconnection of services depends on wholesaler deployed hubbing platforms. Wholesale markets already involve complex interactions between players and their services, issues of neutrality and equity, and flexible partnerships. All of these characteristics will become even more critical as TMT markets develop. Wholesalers must adapt fast to meet the changing demands.

For the first time, increased revenues from wholesaling non-voice services more than compensated for the decline in voice service revenues.

Themes for 2017

**Extending indirect channels to market**

Communications service providers need to reach additional wholesale market segments by developing offers for a growing variety of indirect channels. We investigate the differing needs of channels including B2B2C, sell-with and sell-through partners, resellers, distributors, and agents.

**Maximizing the impact of wholesale on group revenue and profitability**

Some C-level executives still do not understand the beneficial impact that offering wholesale services can have on group top and bottom lines. Our analysis will demonstrate how developing the wholesale channel can improve telco economics, revenues, and profitability.

**Developments in neutral infrastructure**

The number and variety of players offering carrier-neutral access and backbone networks, data centers, and cell towers is growing. Our research will identify the strengths and weaknesses of different carrier-neutral strategies, and analyze their impact on established communications service providers.

**Key Deliverables**

- Wholesale customer survey – on their evolving priorities and how well suppliers are meeting their expectations.
- Wholesale innovation analyzer – covering the most innovative wholesale services, strategies, and partnerships announced during 2016.
- European wholesale market share report – tracking the changing revenues of the leading wholesale players in Europe, and how it impacts their market share.

What's New?

- **Global IoT connectivity readiness matrix** – comparing leading international wholesalers’ ability to support international IoT services.
- **Wholesale Business Practices** – recommends what wholesalers should change to better meet customer and shareholder demands.
Only Ovum provides network vendor specific research with comprehensive multi-country operator capex trends coverage.
75% of telcos are transitioning to a digital operating model in the next 18 months.


data

Themes for 2017

Managing & improving CX

Poor network quality, bad service delivery, and ill defined business processes and dependencies plague telcos as they try to improve their operations. OSS/BSS, CRM, policy software and BI platforms are all part of the telco toolkit to manage the CE, and remain important drivers for IT spend. Our technical and commercial coverage delivers the directional insights for telcos and the vendor suppliers competing for their business.

Exploiting data assets with analytics

Big Data analytics provides an opportunity for telcos to exploit an existing asset that’s increasing in size exponentially. To date, market research has focused on the business case rather than the market opportunity and evaluation of analytics tools. In 2017, we will cover both aspects with a new market forecast on big data and an update to our 2015 decision matrix on analytics tools for customer data.

IT service opportunities in telecoms

The telecoms vertical has a specific set of requirements that cannot be served with “drag and drop” solutions from other industries. Telcos’ M&A activity, abundant legacy and the need for new operating models means that ICT and professional services companies need a forensic understanding of their strengths and weaknesses before they tackle the rich opportunities offered by the telecoms vertical. Ovum’s ‘Telecoms Operations & IT Practice’ assesses the services portfolio offered by key players, and looks at the value of this opportunity over the next 5 years.

Successful strategies for digital transformation

Telcos need lean, virtualized infrastructures to sustain their business and innovate new services. They must be able to orchestrate hybrid network and service, use programmable software & analytics to automate and direct business logic, and manage the digital customer engagement end to end. Our research assesses how technology developments such as SDN and NFV (which enable private cloud) will shape the telco’s IT estate and the responsibilities of the CIO.

What’s New?

- CTO Insights – for the telcos industry.
- Telecoms market forecasts and analysis – with an IT service provider focus.
- Telecoms market share report – with a Network and IT services focus.
- OSS/BSS cloud tracker.

Key Deliverables

- Ovum Decision Matrix – comparatively evaluating the leading telco technology solutions, with individual SWOT assessments (inc. integrated Billing and Charging, CRM for Telcos, and Customer Data Analytics.)
- OSS/BSS market forecast – an annually updated interactive tool covering the key categories for OSS and BSS, including market data by product type and region.
- ICT Enterprise Insights in the Telecoms Industry – identifying the business and investment trends for telco IT in key technology areas.
- Telco and vendor Case Studies – recommendations, best practice, and advice based on telco customer experience and big data and analytics strategies, as well as vendor portfolio analysis and recent telco deployments.
Broadcasters and digital service providers are embarking on the media transformation journey to accelerate personalized customer engagement.

Central to this transition, termed the “Our Own Media Company” paradigm, will be highly complex, large scale media transformation projects, demanding the slow but steady migration of entire content supply workflows on to IP. Workflow orchestration must meet dynamic business needs, including the integration of IoT-connected living room experiences, VR content, and UHD content into the existing content value chain.

In the highly volatile media transformation era, both digital service providers and premium media asset owners are faced by three significant challenges: the lack of niche industry specific partnership ecosystems; insufficient multi-form content monetization functionalities and pre-packaged professional services; and traditionally offered household content and advertising services.

Broadcasters will lead the transformation journey, controlling more than half of total spend across the media transformation services segment by 2022.

Themes for 2017

Moving the content supply chain on to IP
According to Ovum’s ICT Enterprise Insights survey for Media, 37% of media enterprises identified operational efficiency as the core business challenge. The emergence of software defined networks, encoding, transcoding, and storage is pushing enterprises to move their content supply chain modules on to IP. Media distribution modules will lead this migration.

VR content: new rights & royalties complexities
In a multi-screen monetization ecosystem, managing complex rights and royalties is one of the pivotal challenges faced by today’s digital content owners. VR content is predicted to become mainstream in the next 4-5 years, and its evolution will contribute to revenue leakage and churn risks. Existing rights & royalties vendors will need to adopt this 360-degree video content format on a real-time basis.

Cloud, security, and network ICT services: accelerating transformation
The media sector has been slow in adopting cloud, security, and network technologies. However, demand will be fuelled as the majority of media enterprises begin to embrace the “digital audience first” growth strategy. Horizontal ICT services such as cloud security and networks that improve single media asset ROI and individual audience ARPU (average revenue per user), will be highly sought after.

Safeguarding video assets through real-time watermarking
In 2016, HBO plans to increase its premium content production budget by 20%. The proliferation of media and non-media devices along with dynamic video consumption patterns will result in media enterprises safeguarding their premium digital assets to accelerate ROI and operating margins. Real-time watermarking paves the way for a cost effective solution.

QoS and QoE will be vital in lowering churn rates
Broadcasters and digital service providers alike must retain audiences and subscribers to improve the profitability of their stand-alone platforms. In order to do this they need to promptly address the challenges presented by a fragmented multiscreen video services segment.

Key Deliverables

→ Innovative case studies – on a range of media transformation projects.
→ Research notes on the changing market dynamics – across media delivery and distribution modules, with special emphasis on CDN and network based ICT services demand.
→ Ovum Decision Matrix – on VR rights and royalties processing technologies.
Intelligent Networks

By 2025, all service provider networks will be smarter, faster, more efficient, and virtualized.

What’s New?
→ NFV & SDN forecasts – bottom-up, granular forecasts segmented per technology area.
→ CTO survey – on the industry-wide opportunities and challenges facing telcom CTOs.

Themes for 2017

The implications of telco cloud
Vendor lock-in, proprietary hardware, and slow service development lifecycles are pushing operators to deploy SDN, NFV, and cloud computing to adapt to traffic demands and create or remove services much more quickly. Our service includes data, analysis, and forecasts for these areas to help you separate hype from reality and identify areas of investment.

Next gen fixed broadband access
QoS savvy residential customers are seeking high-quality video and VR experiences, and expect paid-for content and applications to meet their QoE expectations. Service providers therefore need solutions that enable premium content and services delivery, supporting seamless bandwidth upgrades and diminishing equipment vendor lock-in. We continuously track the adoption of next-gen broadband technologies for fiber, copper, and coax as well as providing equipment forecasts by major region and country for wireline broadband access equipment.

RAN
The radio access network must support ever-greater capacity, performance levels and flexible service delivery. Operators also need a network that can adapt to extremes of demand, from ultra-high-speed MBB services to low-rate IoT. Cloud-RAN and hetnets, as well as MIMO and carrier aggregation will be critical as LTE evolves to meet the demanding 5G timetable. Spectrum will also be key as multiple new licensed and unlicensed bands come into play. Ovum provides data, analysis, and forecasts to track rates of adoption highlight trends and identify new technologies and opportunities.

DC/optical advances
Optical networks interconnect all communications user categories and their data, across town and across the globe. Service providers are under increasing pressure to increase bandwidth and flexibility while reducing the cost to do so. Meanwhile, optical network architectures are undergoing transformation to optimize for a more data center centric world. Ovum tracks the development and adoption of key advances, such as 100G, 200G, 400G and beyond, along with C6C-F ROADMs and optical switches. We also monitor the demands from the data center interconnect market segment and provides equipment forecasts by major region/country for the optical core market.

Managed services/SI topic
CSPs need to change dramatically and can do so only with close vendor services support in the key areas of network transformation, centralization, automation, customer experience, SDN/NFV, and shift to the cloud. The market is increasingly crowded, with integrators and IT services companies targeting CSPs, and network equipment providers seeking gains from the growing consultancy and systems integration opportunity. We provide data, analysis, and forecasts across these topics, identifying the key players and services in a rapidly changing market.

QoS and QoE will be vital in lowering churn rates
Broadcasters and digital service providers alike must retain audiences and subscribers to improve the profitability of their stand-alone platforms. In order to do this they need to promptly address the challenges presented by a fragmented multiscreen video services segment.

Key Deliverables
→ CTO survey – on the key challenges facing CTOs, and where market influencers aim to invest in the next years.
→ Telco cloud research – market trackers for SDNNFV deployments and thought-leading research in telco cloud.
→ Telecoms Vendor Contract Analytics – providing visibility on vendor contracts and the major technology investment opportunities.
→ Data center data and analysis – on data center trends, how they connect and which companies are driving and shaping the market.
→ Quarterly market shares reporting – covering optical networking, optical components, FTTX, DSL and CMTS, datacenter interconnect, and switching/routing.
Optical Components

As the demand for high bandwidth increases and advancing technology requirements intensify, successful component manufacturers must supply the system vendors with cost effective products in an increasingly timely manner.

Telecoms companies and data center operators, the key players in the optical components market, face an increased demand for high bandwidth. Both have been forced to upgrade their networks to 100G and beyond. The two markets have different requirements and timelines that will place a significant strain on manufacturers. The pressure on optical component vendors’ margins is being squeezed due to pricing pressures by the equipment vendors and raw material costs, and component companies must invest in new manufacturing facilities and technology to keep up with the demand from both markets.

The $10 billion optical component market enables the multi-$trillion global digital economy, all the money runs over the light.

Themes for 2017

New Technologies and Materials

New technology is needed to support rapidly advancing optical network requirements. To keep up with the changes, component manufacturers must invest in R&D and manufacturing, and understand which technologies to invest in and when. Our service investigates the up and coming requirements and technologies of InP, Meta-materials, Silicon Photonics, On Board Optics, modulation formats, and testing techniques and continuously tracks their demand.

Optical components: stay ahead of the game

Optical components are at the core of the access, metro, long haul, and data center optical networks. To keep up with the demand needed to support increasing bandwidth usage, system providers, and component vendors must stay up to date with accurate data on competition, demand as well as current and future technologies. We continuously monitor the demand of optical components and provide component suppliers and system vendors with the information to accurately predict product demand and timing, maximizing margins and profit.

DC/optical advances

Optical networks interconnect all communications user categories and their data, across town and across the globe. Service providers are under increasing pressure to increase bandwidth and flexibility while reducing the cost to do so. Ovum continuously tracks details on the development and adoption of high capacity optical network technologies such as 100G, 200G, 400G, and beyond. We also monitor the advances that will enable more flexible and agile optical networks, such as CDF-F ROADMs and optical switches, as well as new requirements and demands emanating from the data center interconnect market segment.

Next gen fixed broadband access

QoE savvy residential customers are seeking high-quality video and VR experiences, and expect pay-for-content and applications to meet their QoE expectations. Service providers therefore need solutions that enable premium content and services delivery, supporting seamless bandwidth upgrades and diminishing equipment vendor lock-in. We continuously track the adoption of next-gen broadband technologies for fiber, copper, and coax, as well as providing equipment forecasts by major region/country for wireline broadband access equipment.

What’s New?

- Spatial Multiplexing – tracking key multiplexing technologies and markets.
- Enabling technologies and advances in materials report – addressing the next generation enabling technologies for more advanced optical networks.
- SDN/NFV in access report series – covering the adoption of SDN/NFV into wireline broadband access networks, such as the vOLT and the impact on the optical component industry.
- Test and measurement report – investigating the testing requirements and demand used during installation, commissioning, and monitoring of optical networks.

Key Deliverables

- Annual optical component forecast – to keep you up-to-date with recent news and stay ahead of the competition
- 100G - 400G forecast – our 40G-100G forecast expanded to cover 400G
- Data center market watch – tracking the data center deployment trends shaping optical network architectures.
- Quarterly market shares reporting – data sheets for optical components, PON, optical networking, and data center interconnect.
Market Data and Forecasts

Only Ovum provides 5-year forecasts for M2M connections in 206 markets.
Data Tools

World Cellular Information Service
A Benchmark source of cellular market data

World Cellular Information Service (WCIS) has become the mobile market data benchmark for service providers and vendors across the globe. It provides historical and five-year forecast data for subscriptions, market share, and penetration for every operator, every network, and every country market. Further datasets provide detailed insight into service provider and network KPIs, licenses and spectrum auctions, ownership and investments, and handsets. WCIS enables players to size and segment their markets, identify trends, understand market behaviour, and act on competitive threats.

Use WCIS to:

→ Understand the size and rate of growth of every country market, technology, operator, and network.
→ Assess the performance of networks, operators, and payment models to evaluate the health of each player and the tactics to succeed in each market.
→ Identify which operators have acquired which licenses in each country market, including the spectrum and price paid.
→ Assess service provider reach, scale, growth, and strategy across their global network portfolio.
→ Identify the range of devices applicable to each network type and their specifications and features.

World Cellular Information Service is the only data source you need to succeed in mobile communication.

Contact us to request a demonstration.

World Broadband Information Service
The complete broadband and multichannel TV tracking resource

World Broadband Information Service (WBIS) provides constantly updated and accurate subscriber data and five-year forecasts on the fixed broadband industry worldwide. The service tracks the industry’s key areas including subscription statistics for fixed broadband, TV, and fixed voice, broadband forecasts, and operational and financial key performance indicators.

Use WBIS to:

→ Establish the market trends and dynamics for each local market.
→ Identify national and regional markets with the greatest growth potential by service.
→ Track the performance of service providers across their regional and country markets with standardized key performance indicators.

World Broadband Information Service is the most comprehensive broadband and TV tracking tool available.

Contact us to request a demonstration.
**Data Tools**

**World TV Information Service**

The definitive multiscreen market tracking and forecasting service

World TV Information Service (WTVIS) is the most complete multiscreen market tracking and forecasting tool available, covering traditional TV, OTT video, broadband, and devices. It provides metrics for 161 countries, in both advanced and emerging markets, and includes unrivalled coverage of OTT video markets and service providers.

Each forecast provides a five-year perspective enabling you to compare market potential by country, technology and channel. To support longer term trend analysis, historical TV subscriptions by quarter are available for 700 operators in 149 markets from year 2000.

To save you time WTVIS also incorporates “hot issue” dashboards highlighting big picture trends, tools for quickly compiling comparison tables and rankings, and country deep dives bringing together metrics from across each dataset. All data views are easily extractable allowing you to conduct further analysis and drop data directly into your own model.

**Use WTVIS to:**

- Rank and compare markets to identify those that provide the greatest opportunity in terms of total revenue, and assess which will be the dominant access models.
- Compare and identify country markets where OTT Video or Smart TV are forecast to have the greatest impact.
- Quantify all TV, video and advertising spend by country and understand how money is made and where it goes in each market.
- Understand the future dynamics and growth potential of traditional TV by technology and business model.
- Identify the greatest threat of disruption in all of your markets.

A subscription to WTVIS includes direct access to our analyst team. Use the service to explore our findings, understand the trends behind the data, or further learn about our methodologies.

Contact us to request a demonstration.

---

**Contracts Analytics**

IT Services Contracts Analytics

The most comprehensive, up-to-date guide to outsourcing contracts

The most comprehensive, up-to-date guide to outsourcing contracts signed within the global IT services market. The database tracks every publicly announced outsourcing deal worth over $1m signed in the marketplace, and contains over 22,000 IT services and BPO deals.

**Use this service to:**

- Identify trends in outsourcing across vertical markets and geographies.
- Discover which vendors are winning major deals.
- Plan your sourcing strategy based on accurate information around market activity and industry comparison.

Telecoms Vendor Contracts Analytics

Your unrivalled source of information on telecoms equipment contracts

Ovum’s Telecom Vendor Contracts Analytics data tool is the most comprehensive source of information on telecoms equipment contracts available. With more than 12,600 publicly announced vendor contracts dating back to 2004, covering 34 market segments, it provides unrivalled insight into the deployments by industry, geography, or customer.

**Use this service to:**

- Identify contracts for specific vendors or customers.
- Track major capex and opex contracts.
- Track a vendor’s market traction in specific geographies.

Telco OSS/BSS Contracts Analytics

Analyze telecoms industry OSS/BSS contracts by company, system area, vendor, and region

Telco OSS/BSS Contracts Analytics service tracks the global OSS/BSS market by tracking publicly announced contracts by telcos segmented across customer, data, network, revenue, and service management. More than 6,000 contracts are accessible via an interactive dashboard, which highlights latest market activity and allows you to undertake trend analysis or isolate contracts by region, solution type, vendor, or company.

**Use this service to:**

- View contract activity by region, type, buyer, and provider.
- Apply the custom features to create your view of market.
- Isolate the most recent activity globally and drill down into contract level summaries.
Market Forecasts

The most comprehensive five year forecasts available

The dynamic nature of service provider markets makes insightful, robust predictions essential to considered decision-making.

Benefit from a complete market view

As markets converge and service bundling becomes mainstream, organizations require a consistent view of demand across all of their markets. Ovum now provides integrated 5-year forecasts with a complete telecoms and media market perspective giving a detailed view by country, technology, and industry. These combined forecasts for fixed, mobile and pay TV services are available for 67 territories.

We track over 1,000 individual metrics including connections, unit sales, revenues, capex, traffic, technology, and events across enterprise and consumer markets. Our more than 100 forecasts lead the market and we have the single largest repository of country data with coverage for 220 territories. Ovum’s index of 2017 forecasts is on pages 66 and 67.

An integrated approach to delivering robust results

We believe forecasts should be prepared as part of a collaborative process involving both quantitative and qualitative analysis. Our forecasting methodology has been developed to optimize the inputs from a variety of sources including:

- regional and industry analyst domain experts with deep expertise and experience
- a centralized, dedicated team of six analysts that specializes in forecasting techniques, business modelling, and financial analysis.

Ovum’s Forecast Methodology

1. Forecast scope
   - Define the metrics, geographies, and time horizon (quarterly to five years)

2. Market mind-map
   - Understand the addressable market and market ecosystem: players, roles, drivers, and inhibitors of growth

3. Data Collection
   - Define the granularity of operational, financial, socio-economic, and demographic inputs

4. Model Design
   - Design the blend of casual, time-series, and judgemental modelling

5. Validation
   - Initial forecasts are validated via internal and external benchmarking.
### Consumer
- Ad-blocking
- App monetization
- Broadband only households
- Carrier billing
- Cloud gaming
- Consumer OTT VOIP
- Consumer wearables
- Digital advertising
- Digital consumer publishing
- Digital music
- eSIM
- Fixed broadband access - Consumer
- Fixed mobile convergence
- Fixed mobile substitution
- Fixed Voice - Consumer
- Fixed Voice - Consumer - Consumer
- Fixed Voice - Consumer - Mobile applications
- Mobile applications
- Mobile connectivity - Consumer
- Mobile gaming
- Mobile handsets
- Mobile messaging
- Mobile only Internet users
- Multiplay service
- OTT messaging
- OTT video
- Pay and FTA TV
- Retail and distribution
- Smart home
- Smart home devices
- Tablets
- Telco TV
- TV advertising
- TV devices - Media streamers
- TV devices - Set-top boxes
- TV devices: Regular, smart and connected TVs
- TV household usage
- Video advertising
- Video games
- VoLTE
- VR content
- VR headsets

### Service Provider Markets
- Fixed broadband access
- Fixed voice
- Global wholesale market
- Integrated mobile, fixed and TV
- Mobile connectivity - MVNO
- Mobile connectivity
- Mobile roaming
- Network traffic
- Cellular devices

### Service Provider Technologies
- Carrier ethernet equipment
- CDN
- FTTx, DSL, and CMTS equipment
- Global contact center technology spending
- Global In-House and outsourced contact center
- Global IVR and speech self-service
- Global small-cells
- Inbound customer service and tech support
- IT Services
- IT Software - Enterprise mobility
- IT Software - Information management
- IT Software - Infrastructure
- IT Software - Security
- LTE by spectrum
- Media transformation services
- Mobile Backhaul and Fronthaul
- Optical components - 40G and 100G
- Optical components - FTTx
- Optical components
- Optical networks
- OSS/BSS
- Radio Access Network
- SDN and NFV
- Service provider revenue and capex
- Service provider switching and routing
- Vendor telecom services
- Workforce optimization technologies

### Enterprise
- Data center interconnect
- Enterprise - Cloud services
- Enterprise - ICT addressable Market
- Enterprise - Outsourcing, consulting and systems integration
- Enterprise mobility - Corporate liable
- Enterprise mobility - Employee liable
- Fixed broadband access - Business
- Fixed voice - Business
- Hosted and Managed Unified Communications services
- IoT
- IP VPN
- M2M
- Mobile connectivity - Business
- Mobile workspace services
- Telco-led cloud services
- Telco-managed ICT services
- TV advertising
- Cellular devices
- TV devices - Consumer

### Other
- Global In-House and outsourced contact center
- Global IVR and speech self-service
- Global small-cells
- Inbound customer service and tech support
- IT Services
- IT Software - Enterprise mobility
- IT Software - Information management
- IT Software - Infrastructure
- IT Software - Security
- LTE by spectrum
- Media transformation services
- Mobile Backhaul and Fronthaul
- Optical components - 40G and 100G
- Optical components - FTTx
- Optical components
- Optical networks
- OSS/BSS
- Radio Access Network
- SDN and NFV
- Service provider revenue and capex
- Service provider switching and routing
- Vendor telecom services
- Workforce optimization technologies

---

**Market Forecasts Index, 2017**

---

**Consumer**

- Ad-blocking
- App monetization
- Broadband only households
- Carrier billing
- Cloud gaming
- Consumer OTT VOIP
- Consumer wearables
- Digital advertising
- Digital consumer publishing
- Digital music
- eSIM
- Fixed broadband access - Consumer
- Fixed mobile convergence
- Fixed mobile substitution
- Fixed Voice - Consumer
- Fixed Voice - Consumer - Consumer
- Fixed Voice - Consumer - Mobile applications
- Mobile applications
- Mobile connectivity - Consumer
- Mobile gaming
- Mobile handsets
- Mobile messaging
- Mobile only Internet users
- Multiplay service
- OTT messaging
- OTT video
- Pay and FTA TV
- Retail and distribution
- Smart home
- Smart home devices
- Tablets
- Telco TV
- TV advertising
- TV devices - Media streamers
- TV devices - Set-top boxes
- TV devices: Regular, smart and connected TVs
- TV household usage
- Video advertising
- Video games
- VoLTE
- VR content
- VR headsets

**Service Provider Markets**

- Fixed broadband access
- Fixed voice
- Global wholesale market
- Integrated mobile, fixed and TV
- Mobile connectivity - MVNO
- Mobile connectivity
- Mobile roaming
- Network traffic
- Cellular devices

**Service Provider Technologies**

- Carrier ethernet equipment
- CDN
- FTTx, DSL, and CMTS equipment
- Global contact center technology spending
- Global In-House and outsourced contact center
- Global IVR and speech self-service
- Global small-cells
- Inbound customer service and tech support
- IT Services
- IT Software - Enterprise mobility
- IT Software - Information management
- IT Software - Infrastructure
- IT Software - Security
- LTE by spectrum
- Media transformation services
- Mobile Backhaul and Fronthaul
- Optical components - 40G and 100G
- Optical components - FTTx
- Optical components
- Optical networks
- OSS/BSS
- Radio Access Network
- SDN and NFV
- Service provider revenue and capex
- Service provider switching and routing
- Vendor telecom services
- Workforce optimization technologies

---

**Enterprise**

- Data center interconnect
- Enterprise - Cloud services
- Enterprise - ICT addressable Market
- Enterprise - Outsourcing, consulting and systems integration
- Enterprise mobility - Corporate liable
- Enterprise mobility - Employee liable
- Fixed broadband access - Business
- Fixed voice - Business
- Hosted and Managed Unified Communications services
- IoT
- IP VPN
- M2M
- Mobile connectivity - Business
- Mobile workspace services
- Telco-led cloud services
- Telco-managed ICT services
- TV advertising
- Cellular devices
- TV devices - Consumer

---

**Other**

- Global In-House and outsourced contact center
- Global IVR and speech self-service
- Global small-cells
- Inbound customer service and tech support
- IT Services
- IT Software - Enterprise mobility
- IT Software - Information management
- IT Software - Infrastructure
- IT Software - Security
- LTE by spectrum
- Media transformation services
- Mobile Backhaul and Fronthaul
- Optical components - 40G and 100G
- Optical components - FTTx
- Optical components
- Optical networks
- OSS/BSS
- Radio Access Network
- SDN and NFV
- Service provider revenue and capex
- Service provider switching and routing
- Vendor telecom services
- Workforce optimization technologies
The Complete Solution For Your Business

Only Ovum places analyst interaction at the center of every subscription.
Knowledge Center

Knowledge Center is Ovum's powerful research portal.

Now with simplified search, a new data and forecast section, and improved navigation aligned to your market, it’s easier than ever to quickly find the insight you require.

The service includes a wealth of time-saving features that help you leverage our findings and connect with our experts:

→ Access on the move – optimized for desktop, tablet, and smartphone use
→ Comprehensive market data and forecast coverage - interact, analyze, extract
→ Ask an Analyst – put your questions to our analyst team
→ Create custom research alerts – set up weekly or monthly emails
→ Simple navigation, powerful search - find what you need quickly

Deliverables

Analysis

Market Reports – ongoing strategic analysis of critical market issues, trends, and opportunities.

Including market and country analyses, market trends, scenario planning and product segmentation, with strategic recommendations and actionable advice.

Research Notes – detailed insight on the most significant recent market developments.

Covering technology and service launches, CSP strategies and market dynamics, Research Notes provide a concise view of developments in a particular market, the implications for service providers, and actionable recommendations.

Surveys – robust survey analysis.

Expert analysis of both quantitative and qualitative data from surveys undertaken with senior service providers, equipment vendors, consumers, and enterprise end-user communities.

Country Reports – comprehensive summary reports. Providing a complete view of the state of each country market.

Market data and forecasts

Market Forecasts – the most comprehensive five-year market forecasts available.

Our forecasts set the industry standard for consistency and ease of use. Our forecast team and market-facing analysts work collaboratively to ensure our robust methodologies and models are informed by deep qualitative understanding. Delivered in Excel format to allow easy extraction and manipulation of data. Also available as interactive data dashboards making it easy to visualize the data, spot trends, and share with colleagues.

Benchmarks – comparative assessments of operators, vendors, and markets.

A quantitative assessment of operator and vendor strengths relative to their peer group and competitors.

Market Share – quarterly market share reporting.

Market share data covering broadband access (DSL, CMTS, FTTx), optical components, optical networks, and switching and routing markets.

Conference Papers

Exclusive access to the speaker presentations from Informa’s 150+ annual telecoms and media events around the world.

News

Published daily, our news summarizes the most important industry developments and provides a rich archive of company and country events.

Trackers – comparative analysis of service provider performance.

Regular, detailed, comparative analysis supported by industry KPIs, five-year forecasts, and user-behaviour data.

Case Studies – real-world examples and analysis of industry best practice.

Featuring a qualitative assessment of strategy, value chain and market positioning in addition to a quantitative appraisal of success, and competitor benchmarking.

Company Updates – regularly updated, detailed service provider profiles.

Providing quantitative understanding of operational and financial performance, an assessment of local market conditions, market share data, key market and operational initiatives, and product and pricing developments.
Unlocking competitive advantage in the digital economy.

Driving growth used to be much simpler. Which markets are spending the most money? Are we in those markets? What do our customers need from us? Where do our competitors have a presence? Do we have a point of difference?

There are now more complex questions to ask, and more of them, with disruptive technologies changing the rules of the game, and consumers’ expectations increasingly shaping new solutions and services. Making growth strategies succeed.

Making growth strategies succeed
For digital service providers and their technology partners, Ovum provides unique insight into the sizeable but highly contested revenue opportunities within the connected digital economy.
Ovum Consulting consistently delivers against our clients’ project objectives by combining longstanding TMT expertise with the most complete set of industry data available. With methodologies designed to deliver actionable advice, we have a proven track record of helping organizations make the business decisions required to drive growth.

1. Where to play: Identifying and assessing growth opportunities
We provide the insights and recommendations to help our customers understand:
→ The size of the opportunity and how it is forecast to change over time
→ Risks and challenges associated with a new market
→ Disruption potential of emerging technologies on models of distribution and consumption
→ Why this market represents a growth opportunity given our customers’ capabilities and strategy
We are able to provide a granular market view that allows our customers to focus their efforts on the most relevant and potentially lucrative areas of opportunity.

2. How to win: Exploiting the growth opportunities
Ovum enables our customers to go-to-market to exploit identified opportunities by advising on:
→ Market demand, how it is changing, and what is on the road to becoming a digital enterprise
→ The competitive environment and how others are supplying the market
→ The strengths and competencies necessary to claim a position in the market ahead of the competition
→ Potential future partners who can enable the exploiting of growth opportunities
Our market, competitor and channel insight gives our customers the bespoke, actionable insight necessary for them to achieve commercial success.

3. Why us? Positioning our service to deliver growth
We raise awareness of our clients’ position in the market and help them to gain maximum market exposure with customers, partners, and prospects through a range of content marketing services that can be tailored to specific messaging needs. These include:
→ White papers
→ Case studies
→ Thought leadership studies
→ Market surveys
→ Video marketing
→ Webinars
→ Infographics
→ Web marketing
→ Speaking engagements
→ Internal engagement workshops
By building our independent views into our customers’ marketing campaigns, we deliver an authoritative and credible voice that engages audiences, influences future buyers, and drives lead generation.

4. Who to target: increasing sales effectiveness to drive growth
We help sales teams to build pipeline and drive revenue by prioritizing their efforts and supporting them in focusing on the specific objectives of buyers with insight into:
→ Customers’ buying habits and how they are changing
→ Customer ICT budgets in very real dollar terms
→ The business drivers for ICT investment
→ Detailed prospect profiles to help sales teams sell more effectively
Ovum’s proprietary data and custom research methodologies enable us to prioritize named customer and prospect accounts by granular ICT spend data, current supplier and investment strategy to provide your sales force with the tools to build in-year pipeline.
What our customers have to say about us

“Ovum consultants’ technical expertise, global coverage of our market, and depth of analysis make for recommendations we can action immediately” – European Tier 1 telco

“Ovum consultants provide practical outcomes, based on deep subject matter expertise.” – US network solutions manufacturer

“Ovum is a leading player – they talk to the right operators, have a good view of the market, know their technology and give a realistic picture of what the market is saying.” – European Tier 1 network equipment manufacturer

“Ovum shows a true understanding of the developed world.” – Indian value-added services provider

“Ovum is one of the few in their tier who cover SMEs.” – UK leading supplier of voice, data and mobile products and services

Let us help you with your growth strategy. Contact Ovum Consulting.

Ask our analysts

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face sessions with our expert analyst team.

A central feature of all our subscription services, it’s invaluable when you need clarification, expert opinion or market context to support your decision making.

Gemma Bunting
Customer Experience Manager

Draw on our expertise to:
→ Gain further insight into our findings
→ Further explore our methodologies
→ Contextualize key market developments

We have engineered our response procedure to be fast, flexible and effective:
→ Each enquiry is prioritized via a senior analyst, dedicated to providing rapid first response
→ We can respond by email, telephone, or face-to-face, whatever your preference.

Consider our analysts an extension of your team, ready to support whenever the need arises.

We have senior analyst resource dedicated to managing our support service

Ovum provides the industry’s leading client support service, both in terms of response quality and timeliness. Direct interactions with our analyst teams are routinely cited by our clients as crucial in shaping and validating their business strategies.

We have senior analyst resource dedicated to managing our support service

Ovum provides the industry’s leading client support service, both in terms of response quality and timeliness. Direct interactions with our analyst teams are routinely cited by our clients as crucial in shaping and validating their business strategies.
For more information, please contact us:

enquiries@ovum.com
twitter.com/ovum
linkedin.com/company/ovum