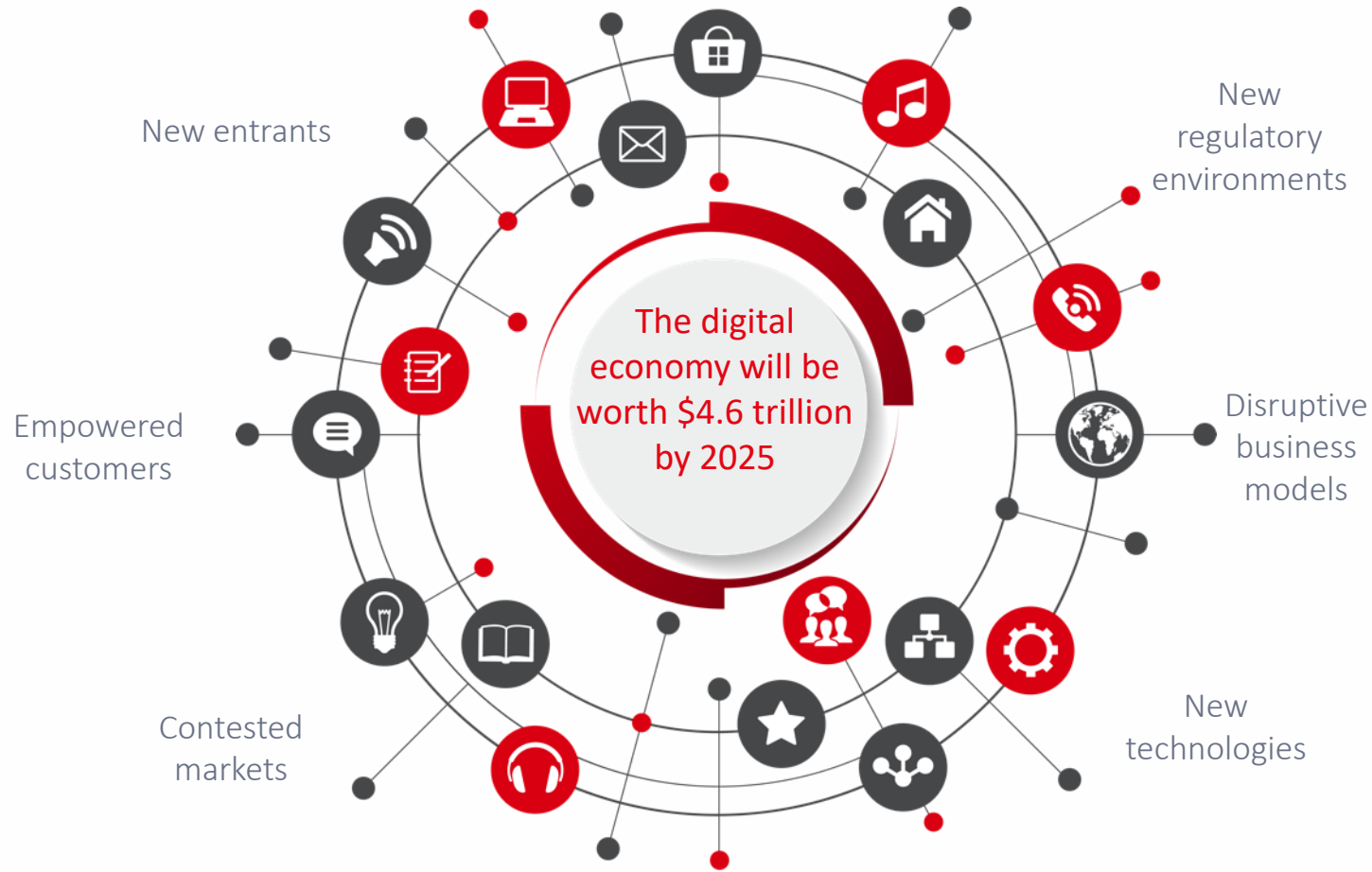


Ovum

Helping organizations thrive in the connected digital economy

The Digital Economy



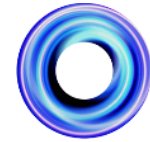
New technologies, increased customer expectations and new business models are transforming the digital economy



Ovum is a market-leading data, research and consulting business focused on helping **digital service providers, technology companies** and **enterprise decision-makers** thrive in the connected digital economy.

We create business advantage for our customers by providing actionable insight to support their business planning, product development and go-to-market initiatives.

We are part of **FTSE 100**
Informa Group



informa

Key questions we answer for our clients



Where to play

Discover which market segments, geographies, and partners to prioritize using data and forecasts of unrivalled depth and breadth



What to deliver

Create compelling products and services based on data on consumer behaviour, market trackers, and service provider benchmarks



How to sell

Optimise your go-to-market strategies by identifying the best segmentation feature-set, pricing, bundling, partnership options for your organization



We look to Ovum as a trusted partner...for their expert knowledge of the market, client requirements, and our competitors' offerings...they help us shape our go-to-market messaging.

Alan Ganson – Head of Analyst Relations,
Ericsson




Ovum works with organizations from across the digital economy



What sets us apart?

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



OUR EXPERTISE

Our global team has been guiding our clients to growth for more than 30 years



OUR DATA AND FORECASTS

Our data provides decision-support for strategic planning through to account level engagement



OUR APPROACH

We focus on the intersection of leading edge technologies incl: 5G, AI, Cloud, IoT, Security, Video



About Ovum



We have
150 analysts

with an average of over
10 years

Industry experience



They work from over
20 research locations

across the globe



Each year we publish over
1,800 reports
and data sets

Our **more than 100 forecasts** lead the market and we have across our proprietary data sets more than:

20 million data points



We have the **longest running and largest** annual IT decision-maker survey

6,700 respondents

Our analysts speak at **leading industry events**



And are quoted in **international and business media**



Our expertise is **recognised by industry watchers.**



Ovum is **uniquely** qualified to support **your organization**



We are part of Informa's global network of TMT brands

Informa Tech operates in **60 markets**, providing **integrated research, media, training and events** to the Technology community



Organizes more than 150 TMT events each year, including Black Hat, Broadband World Forum, and TechXLR8



Reaches 3.8m visitors a month via TMT digital communities, including nojitter, DARK Reading, Light Reading and telecoms.com



Provides a platform for us to help our clients raise awareness and create demand for their technology innovations and services

150


TMT events

3.8m

visitors



Ovum and Informa have a depth of influence in key TMT segments

	SERVICE PROVIDER	ENTERPRISE IT	SECURITY	MEDIA & ENTERTAINMENT	EMERGING TECHNOLOGIES
EVENTS	    	      		     	      
MEDIA	   	   	 	  	  



Our Services

Our global team of analysts are at the heart of our data, research, consulting, and marketing services



Ovum's 2019 services

Research Services

SERVICE PROVIDER MARKETS

- Service Provider Strategies
- Regulation
- Wholesale
- Americas Markets
- Asia Markets
- European Markets
- MEA Markets

CONSUMER & ENTERTAINMENT SERVICES

- Communications & Social
- Media & Entertainment
- Smart Living
- Broadband & Multi-play
- Consumer Technology
- Payments

ENTERPRISE SERVICES

- Advanced Digital Services
- Customer Engagement
- SME & SoHo Services
- Network Transformation and cloud
- Workspace Services

INTERNET OF THINGS

- Markets and Technologies
- Verticals
- Competitive Strategies

SERVICE PROVIDER TECH

- Components
- Network Infrastructure & Softw.
- Media Tech
- Telco Ops & IT

ENTERPRISE TECHNOLOGY

- Customer Engagement
- Data & Enterprise Intelligence
- Enterprise ICT Management
- Infrastructure Solutions

ENTERPRISE VERTICALS

- Financial Services
- Public Sector
- Telecoms Operations & IT
- Media Technology

ENTERPRISE DECISION-MAKER

- Customer Engagement
- Data & Enterprise Intelligence
- Enterprise ICT Management
- Infrastructure Solutions
- Advanced Digital Services
- Customer Engagement
- SME & SoHo Services
- Network Transformation and cloud
- Workspace Services
- Financial Services
- Public Sector
- Media & Broadcast
- Telecoms Operations & IT

5G ACCELERATOR

- Monetizing 5G

CYBERSECURITY ACCELERATOR

- Managing Digital Risk

TRACTICA

- Artificial Intelligence

Consulting Services

WHERE TO
PLAY

WHAT TO
DELIVER

HOW TO
SELL

Data Services

WORLD TELECOMS & MEDIA INFORMATION SERVICE

- Converged
- Mobile
- Fixed
- TV / OTT
- Financial Benchmarks

FORECASTER

- Consumer & Intelligence Svcs
- Enterprise Services
- Service Provider Technology
- Internet of Things
- Enterprise Technology
- Enterprise Verticals

TARGET

- Contracts Intelligence
- ICT Spending Predictor

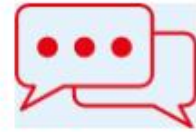
INSIGHTS

- Consumer Insights
- ICT Enterprise Insights



Our Ask an Analyst service provides class leading customer support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Ovum's support team is here to help.



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



Billy Davies

Customer
Success Manager



Kâren Dyer

Customer
Success Manager

Draw on our expertise to:

- Make the right decisions
- Get the most out of your subscription
- Sanity-check your own findings
- Understand more about our methodologies



Ovum's Knowledge Center provides easy access to your services by desktop, tablet or mobile

The screenshot shows the Ovum Knowledge Center website. At the top, the header includes the Ovum Knowledge Center logo, a search bar, and a user profile for Nigel Routledge. Below the header, there are navigation links for Research Services and Data Services, along with links to Ask an Analyst and Help. A red banner announces a new 5G Research Service - 5G Accelerator. The main content area features a section titled 'Target: ICT spending and contracts' with a sub-header 'Do you know which segments and accounts you should be prioritising for 2019?'. The text describes the difficulty of finding robust, account-level intelligence and mentions that Ovum provides detailed ICT spend predictions for 60,000 organizations globally. A 'Find out more' button is present. To the right, a donut chart shows that 42.1% of spending from large enterprises falls in North America, and 4.8% falls in the rest of the world. Below this, a 'Most read' section lists several articles with their titles, dates, and authors.

Ovum Knowledge Center
TMT Intelligence | Informa

Search Nigel Routledge

Research Services Data Services

Ask an Analyst Help

We've just launched a new 5G Research Service - 5G Accelerator [Find out more.](#) [Close](#)

Target: ICT spending and contracts

Do you know which segments and accounts you should be prioritising for 2019?

Finding robust, account-level intelligence with which to **identify priority segments** and **identify the most lucrative prospects** is difficult and time consuming. We provide commercial teams with detailed ICT spend predictions for 60,000 organizations globally, and insight on thousands of contracts in dynamic markets.

[Find out more](#)

4.8% Rest of world

42.1% North America

Nearly 60% of spending from large enterprises falls

Most read

Role of the Telco: Generating Growth in Future Digital Consumer Services 03 January 2019 Michael Philpott	Global Services Outlook 2019 30 November 2018 David Molony	2019 Trends to Watch: Cybersecurity 03 December 2018 Maxine Holt	5G: Key Market Developments 3Q18 29 October 2018 Paul Lambert	Operator Perspectives 2025: The Future of Enterprise Network Services 12 September 2018 Brian Washburn
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Research Services

Ovum's 2019 Research Services

Each service blends ongoing analysis and market data and forecasts with Ovum's market leading "Ask an Analyst" service

SERVICE PROVIDER MARKETS

Expert guidance on the strategies for success in rapidly changing markets, as regulation and new digital disruptors drive adoption, growth, and competition between new and existing services.

CONSUMER & ENTERTAINMENT SERVICES

Intelligence to help service providers and brands capitalise on the transformation of an ever-growing array of consumer services by social, mobile, video and data-driven technologies.

ENTERPRISE SERVICES

Analyst insight and market data to help service providers profit from the migration of traditional on-site enterprise ICT to managed and cloud delivery models.

SERVICE PROVIDER TECHNOLOGY

Insight, analysis and data exploring service provider adoption and spending on the core technologies enabling the delivery of new consumer and enterprise services.

INTERNET OF THINGS

Expert insight to help organizations develop agile strategies that target the IoT market including evaluations of the newest approaches to IoT business models and partnerships.

ENTERPRISE TECHNOLOGY

Unique insight into the business trends driving digital transformation, the capabilities of solution vendors, and the spending intentions of technology buyers including comprehensive share of wallet and spending data.

ENTERPRISE VERTICALS

Expert analysis of the business issues and challenges that drive investment in software and services in key vertical industries including Financial Services, Public Sector and Telecoms.

ENTERPRISE DECISION MAKER

Intelligence on disruptive technology trends and guidance on designing appropriate architectures and roadmaps and then selecting the most suitable technology solutions.



Service Provider Markets Research Service

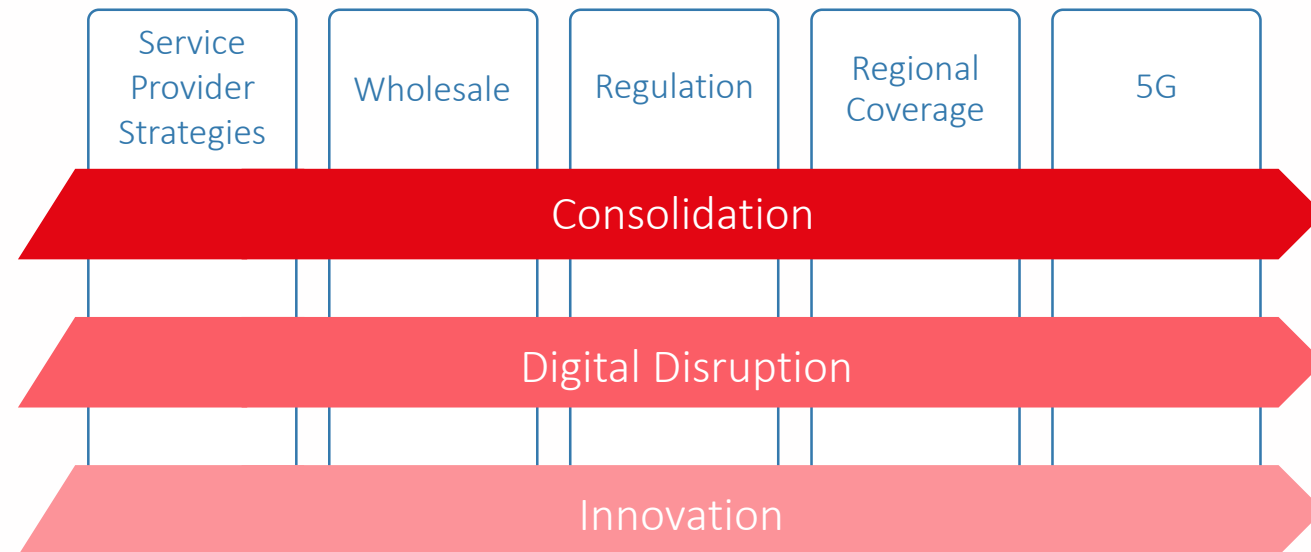
“Service providers are at a strategic crossroads as they balance the need to defend and innovate around their massive but mature mobile, broadband and TV businesses driving the bulk of their revenues while investing in new digital platforms and services such as 5G, OTT and IoT.”



Mike Roberts
Research Director

We can help you:

- Learn how service providers are developing strategies and services for new technology platforms
- Assess the health and outlook of the mobile, broadband, and TV markets worldwide
- Stay up to date on global regulation, 5G rollouts, wholesale markets, and other opportunities



Service Provider Markets 2019 research themes

SERVICE PROVIDER STRATEGIES

- 5G service provider strategy, services, and market outlook
- Mobile, broadband and TV markets to 2024
- Service launches and innovation by segment
- Market convergence and consolidation
- Service provider strategy and performance benchmarking

WHOLESALE

- Strategies for effective transitions in wholesale
- Developments in wholesale hubbing services
- Developments in neutral infrastructure
- The impact of consolidation on the wholesale market

REGULATION & POLICY

- Regulating future networks
- Getting the balance right on OTT
- A decisive year for data protection

Key deliverables

- Regional, country and operator reports
- Regional and country Datasets
- Five year wholesale market forecasts
- Case Studies
- Wholesale innovation analyser
- European wholesale market share report
- Wholesale customer survey
- Wholesale broadband and interconnect benchmarks
- Market trackers for spectrum, NGA and wholesale announcements
- Regulation overviews and country scorecards
- Analyst support



Service Provider Markets 2019 research themes

AMERICAS

- US service provider consolidation and convergence
- Americas 5G service provider strategy, services, and market outlook
- Americas service provider innovation
- Americas service provider digital strategies
- Broadband everywhere in the Americas

ASIA

- Asia service provider digital strategies
- Asia 5G service provider strategies, services, and market outlook
- Asia service provider innovation
- Asia enterprise markets
- China is powerhouse of a diverse region

EUROPE

- 5G launches in Europe – create your proposition now
- Fixed-mobile convergence and bundling
- European service provider innovation
- European IoT markets
- European market dynamics

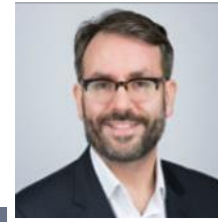
MIDDLE EAST AND AFRICA

- MEA service provider digital strategies
- MEA 5G service provider strategies, services, and market outlook
- MEA service provider innovation
- MEA IoT markets
- MEA market dynamics



Consumer & Entertainment Services Research Service

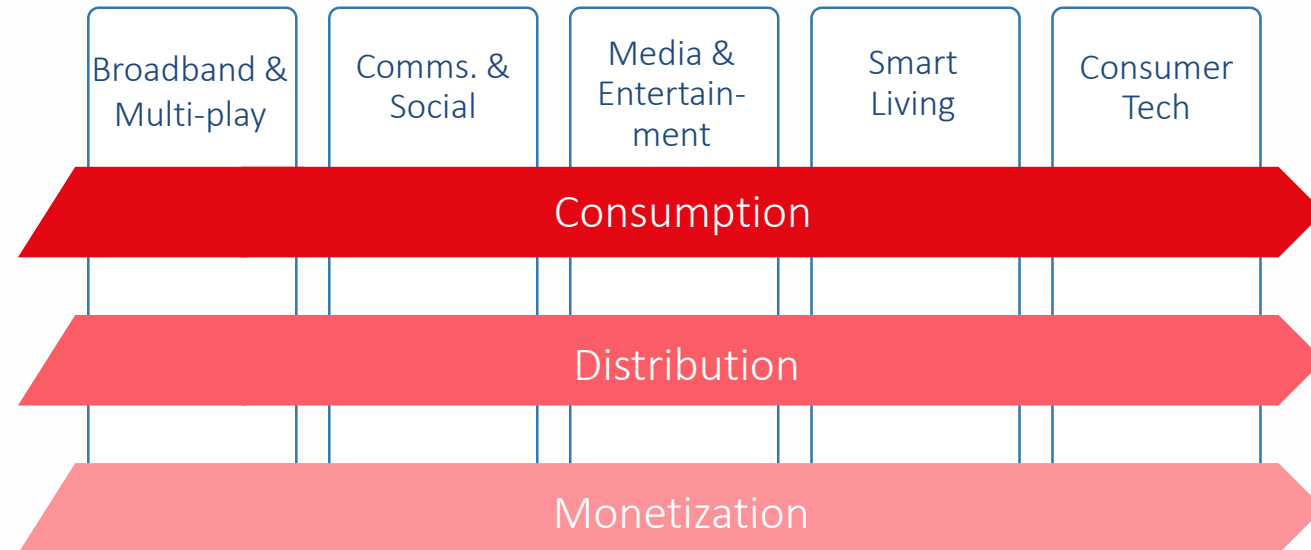
“Technology and consumer behavior are changing faster than ever. Few are clear about which business models or companies will win out. Adapting to become a driver – rather than a survivor – of change will be key to securing a slice of this massive opportunity.”



Rob Gallagher
Research Director

We can help you:

- Understand trends and demand in consumer markets and technologies
- Forecast consumption and plan rollouts for new digital media and technology consumer services
- Develop and optimize revenue models



Consumer & Entertainment Services 2019 research themes

COMMUNICATIONS & SOCIAL NETWORKING

- Mapping the new communications landscape
- The rich new world of A2P communications
- Opportunities and challenges for social media
- Unpacking the communications technology ecosystem

BROADBAND AND MULTI-PLAY

- Innovating with 5G pricing
- Assessing the mobile-only opportunity
- Modernizing the multi-play bundle
- Monetizing gigabit broadband

MEDIA & ENTERTAINMENT

- The changing M&E landscape
- The future of TV & video advertising
- Quantifying the impact of FAANG
- New roles of the network operator
- Emerging digital media opportunities

SMART LIVING

- Understanding smart home dynamics
- The evolution of AI assistants
- Disruptive smart living services
- Monetization & value creation for smart living

CONSUMER TECHNOLOGY

- Quantifying the consumer IoT
- Operator strategies for TV devices
- Understanding the 5G device ecosystem

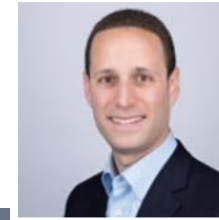
Key deliverables

- Digital Consumer Insights - Broadband & Multi-play, Communications, Entertainment
- 5 year forecasts – incl. consumer broadband, entertainment, mobile and OTT messaging, RCS, consumer IoT, TV devices and smart home
- Trends to Watch reports
- Key conference and event summaries
- Market outlook, innovation and strategy reports
- Market trackers, including OTT Communications and Social Media, OTT media, Smart home, Consumer Tech
- Bundling and tariff innovation case studies
- Analyst support



Enterprise Services Research Service

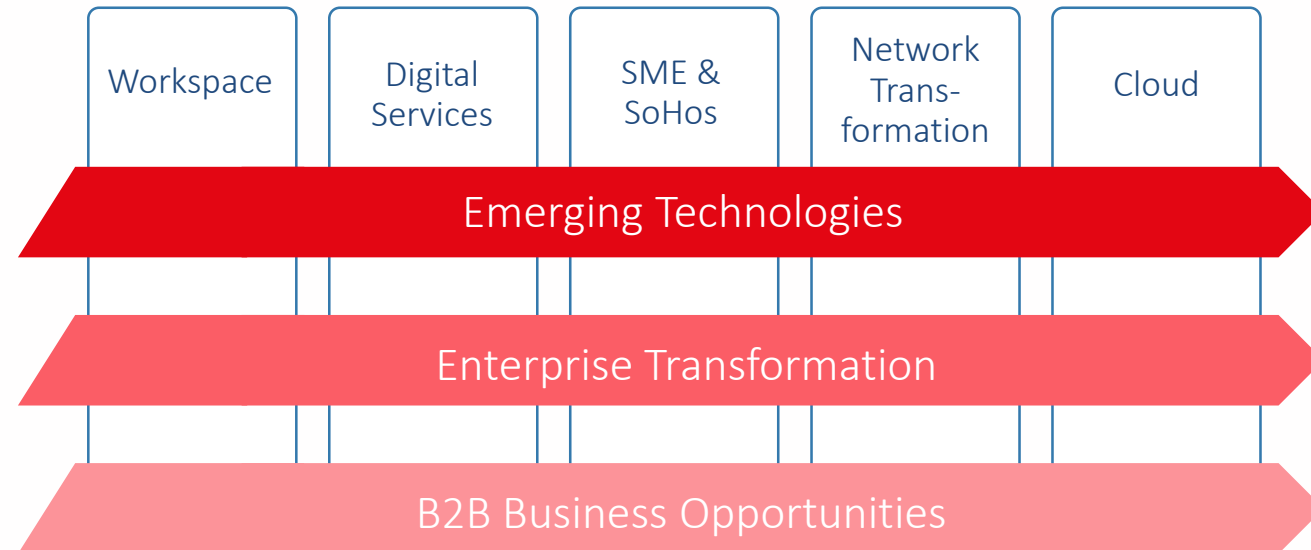
“Digitization means that providers – whether of IT or telecoms heritage – must also transform themselves, and how they build, sell, and support their services. Running and growing a profitable B2B business remains a challenge, especially when business customers are increasingly demanding.”



Evan Kirchheimer
Research Director

We can help you:

- Understand the impact of cloud, AI, virtualization, 5G and other new technologies on the delivery of B2B services
- Gain insight into vendor and service provider strategies and service market forecasts
- Grow a profitable B2B business



Enterprise Services 2019 research themes

NETWORK TRANSFORMATION & CLOUD

- SD-WAN and emerging multi-cloud and programmable network environments
- Security and resilience to protect enterprise assets
- The evolving role of SIs and MSPs in a cloud-centric world
- Successful service models for virtualization/NFV adoption

SME/SOHO SERVICES

- Creating the Digital SME
- Engaging the Digital SME
- Architecting the B2B channel
- Empowering the Entrepreneur

WORKSPACE SERVICES

- Mobilizing the workforce
- Evolution of enterprise collaboration
- Delivering an integrated workspace
- Enterprise use cases for 5G

ADVANCED DIGITAL SERVICES

- Application and services modernization
- Automation and AI technologies: providers driving business outcomes
- Targeting the large enterprise opportunity
- Successful service management

Key deliverables

- Network service assessments
- Cloud service provider updates
- Cloud and network executive insights
- Service provider innovation case studies
- Ovum Decision Matrix
- Mobile workspace service provider assessments
- IT / Telco services contracts analytics
- Enterprise CIO surveys
- SoHo and SMEs insight
- Profiles and case studies
- Forecasts across major B2B services, including VPN and SD WAN and enterprise communications services
- Analyst support



Service Provider Technology Research Service

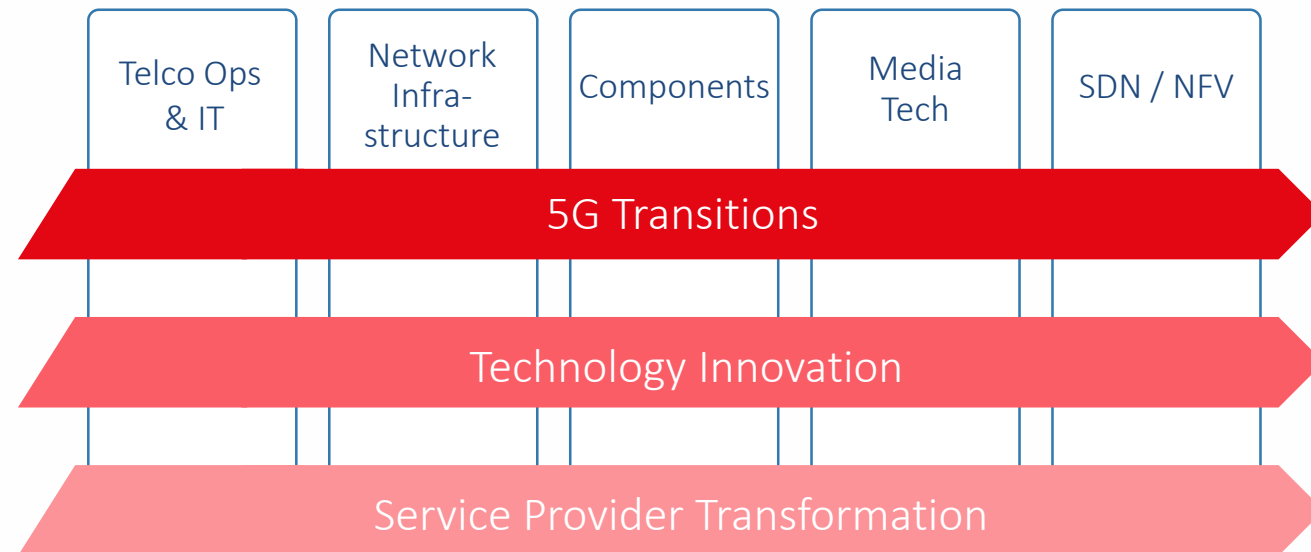
“Communications service providers are in a state of constant change to deliver new services more efficiently. No network domain remains untouched. Both CSPs and vendors will succeed by understanding service provider strategies, which technologies are gaining traction, and how to transform their delivery.”



Kieran Hines
Research Director

We can help you:

- Understand how network virtualization, 5G, and next-generation services are driving vendor and service provider opportunities
- Service Providers: identify innovative vendors and develop technology strategies
- Technology vendors: size opportunities and understand what matters most to CSPs



Service Provider Technology 2019 research themes

NETWORK INFRASTRUCTURE & SOFTWARE

- FTTx and cable broadband fight for the home
- 5G network deployments and end-to-end network implications
- The role of SDN and NFV in supporting 5G and other cloud services
- Cloud adoption and the re-vectoring of data center and network construction roadmaps

MEDIA TECHNOLOGY

- Unification of the media content supply chain
- Delivering personalization and a converged user experience
- Managed Security as a Service across the value chain

OPTICAL COMPONENTS

- Monetizing the next generation of digital communications
- Harnessing the potential of AI and chat bots
- Identifying new opportunities in social media
- Unpacking the communications technology ecosystem

TELECOM OPERATIONS & IT

- Successful CSP strategies for digital transformation
- Intelligent operations as a source of innovation
- Radically improving customer and partner management
- Preparing telecom IT for the arrival of 5G and next-generation networks

Key deliverables

- Quarterly equipment market share reports
- Technology trend reports
- Industry baseline datasets
- Key conference and event summaries
- Quarterly optical components market share reports
- Annual optical components forecast.
- Forecasts covering optical components, network equipment, telecom IT (incl. OSS/BSS) revenues, vendor services revenues and telecom IT spend
- Ovum Decision Matrices
- ICT Enterprise Insights in the Telecoms Industry
- Annual analysis of OSS/BSS contract trends
- Analyst support



Internet of Things Research Service

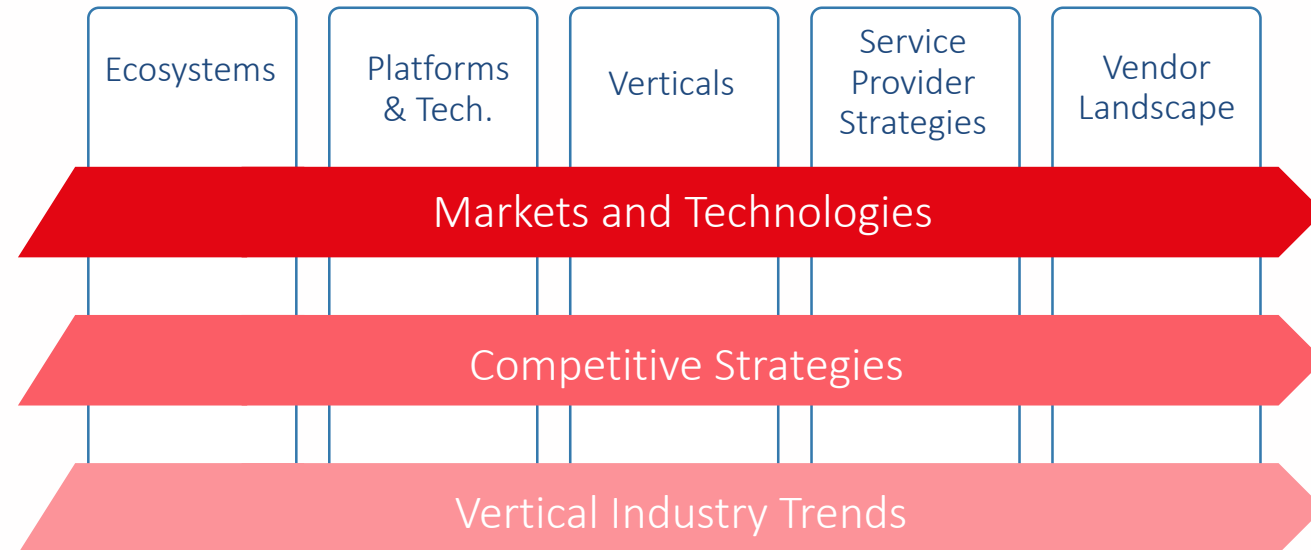
“As the IoT market evolves, industry players must see past the ‘big numbers’ hype to pinpoint the right market approach – identifying where to play in the value chain, how to flexibly support multiple technologies and partnerships, how to help different industries manage the impact, and how to reorient business models.”



Alexandra Rehak
Practice Leader

We can help you:

- Identify where to play most effectively in the IoT value chain.
- Identify the capabilities and partners required to deliver transformational IoT solutions
- Derive maximum impact from emerging technologies, including LPWA, 5G, blockchain and AI



Internet of Things 2019 research themes

MARKET & ECOSYSTEMS

The challenge of monetizing IoT for both providers and end user enterprises, different types of IoT drivers (efficiency, customer satisfaction, innovation, new revenue) and how those link to monetization, pricing strategies, and IoT as an enabler of as-a-service business models in different sectors.

PLATFORMS & TECHNOLOGY

IoT propositions to enterprise customers must focus on addressing business pain points rather than emphasizing technologies. However, the evolution of certain technologies is still going to play an important role in driving forward the IoT opportunity

VERTICAL INTELLIGENCE

Comparing the evolution of the nine major verticals where IoT is having the greatest impact. Vertical deep dives on smart cities and industrial IoT. Vertical use case studies – What's working? What's scalable? What are the challenges?

SERVICE PROVIDER STRATEGIES

How are CSPs addressing the IoT opportunity? What strategies are proving successful, and why? Mapping types of CSPs to types of strategies.

VENDOR INTELLIGENCE

Which vendors are proving most successful in different areas of the IoT value chain and/or different verticals?

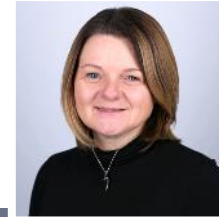
Key deliverables

- IoT strategy profiles and Comparative strategy reports
- IoT technology impact reports
- IoT vertical outlook reports
- IoT project, technology deployment and deal trackers
- IoT enterprise survey 2019
- IoT connections and service revenue forecasts
- Analyst support



Enterprise Technology Research Service

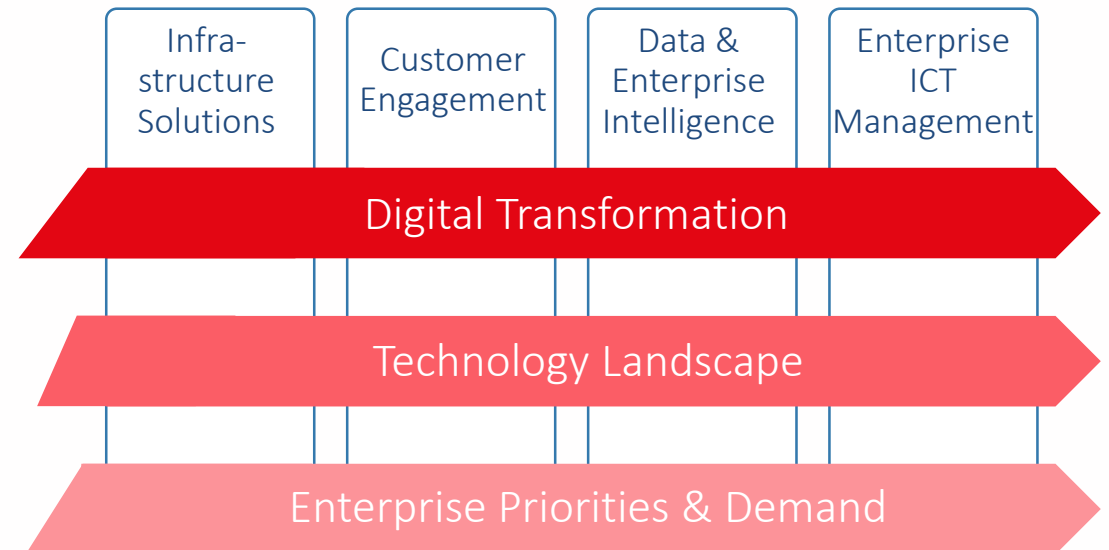
“To support the ongoing digitization of both customer-facing and back-office processes, enterprises and their vendor partners must develop and deliver a coherent portfolio of business-aligned IT services. These provide the foundation for intelligent applications, data-driven insights, and digital innovation, security and reliability”



Maxine Holt
Research Director

We can help you:

- Establish how best to deliver a coherent portfolio of business-aligned IT services
- Identify the business outcomes that define enterprise buying behaviour
- Map the competitive landscape and build robust go-to-market strategies



Enterprise Technology 2019 research themes

INFRASTRUCTURE SOLUTIONS

- Cybersecurity complexity demands platform and service provider support
- Adopting a cloud-centric approach to modernize IT delivery
- Utilizing AI and automation to foster innovation in IT delivery
- New architectures for edge-computing

ENTERPRISE ICT MANAGEMENT

- Evolving the digital IT organization
- Managing in a multi-cloud world
- Adopting disruptive technologies

CUSTOMER ENGAGEMENT

- Digital and physical reality converge for advanced customer experience delivery
- Digital transformation will give way to continuous transformation
- New technologies allows B2Bs to embrace direct-to-consumer relationships

DATA AND ENTERPRISE INTELLIGENCE

- Operationalized AI is defined by governance and transparency
- Data and AI will force enterprises to be data-driven
- The cloud removes the barriers to using ALL of the data

Key deliverables

- Ovum Decision Matrix
- Market Radar
- Software market forecasts
- Technology reports
- Frameworks and blueprints
- Trends to Watch reports
- Enterprise case studies
- ICT Enterprise Insights
- On the Radar reports
- How-to-Guides and Maturity Models
- Analyst support



Enterprise Verticals Research Service

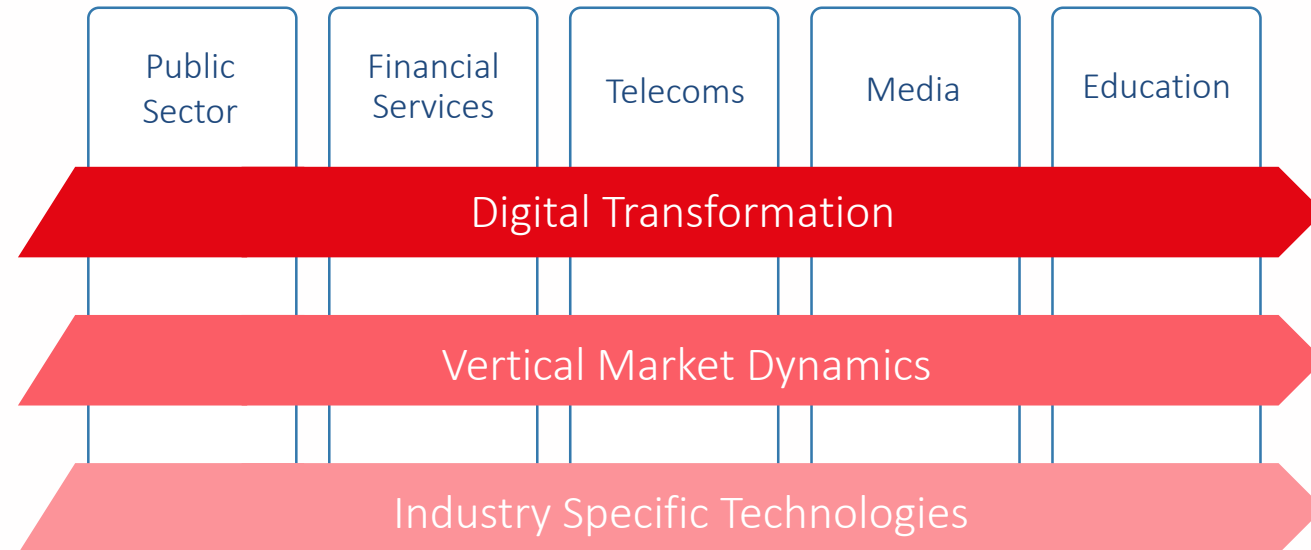
“Enterprises in every industry are facing challenges which are unique to the market, product, and regulatory and competitive situation of their vertical. However, while their journeys will be influenced by specific industry dynamics, the outcome – successfully navigating from analogue to digital business – remains the same.”



Kieran Hines
Research Director

We can help you:

- Develop solutions to address the biggest challenges facing enterprises in your target segments
- Adapt your services and messaging to the specific needs of industry verticals
- Identify where future growth will come and focus your resources accordingly



Enterprise Verticals 2019 research themes

GOVERNMENT

- Managing the real opportunities for cognitive computing and process automation
- Executive leadership in the digital government era
- Moving from agile methodologies to agile organizations

EDUCATION

- Connecting the campus through data analytics
- Personalizing the education experience
- The Education Ecosystem
- Aligning the IT organization to education and research

PAYMENTS

- Open Banking and the future financial services value chain
- Delivering the next generation of payment services through core systems enhancement
- Maximizing the potential of real-time payments

RETAIL BANKING

- Delivering the digital customer experience
- Driving intelligent digital transformation through AI
- Managing risk, security and compliance

TELECOM OPERATIONS & IT

- Successful CSP strategies for digital transformation
- Intelligent operations as a source of innovation
- Radically improving customer and partner management
- Preparing telecom IT for the arrival of 5G and next-generation networks

MEDIA

- Unification of the media content supply chain
- Delivering personalization and a converged user experience
- Managed Security as a Service across the value chain

INSURANCE

- IoT Insurance 2.0
- Delivering value engagement
- Becoming the digital insurer

Key deliverables

- Industry market insight report
- Industry technology reports
- Technology Trends reports
- ICT executive insights by industry
- ICT spending forecasts by industry
- Ovum Decision Matrices
- Analyst support



Enterprise Decision-Maker Research Service

“Enterprises face the twin challenge of transitioning both the IT function and the technology environment to an as-a-service model, while meeting the business imperative for innovation, digitalization and technology-enabled transformation.”

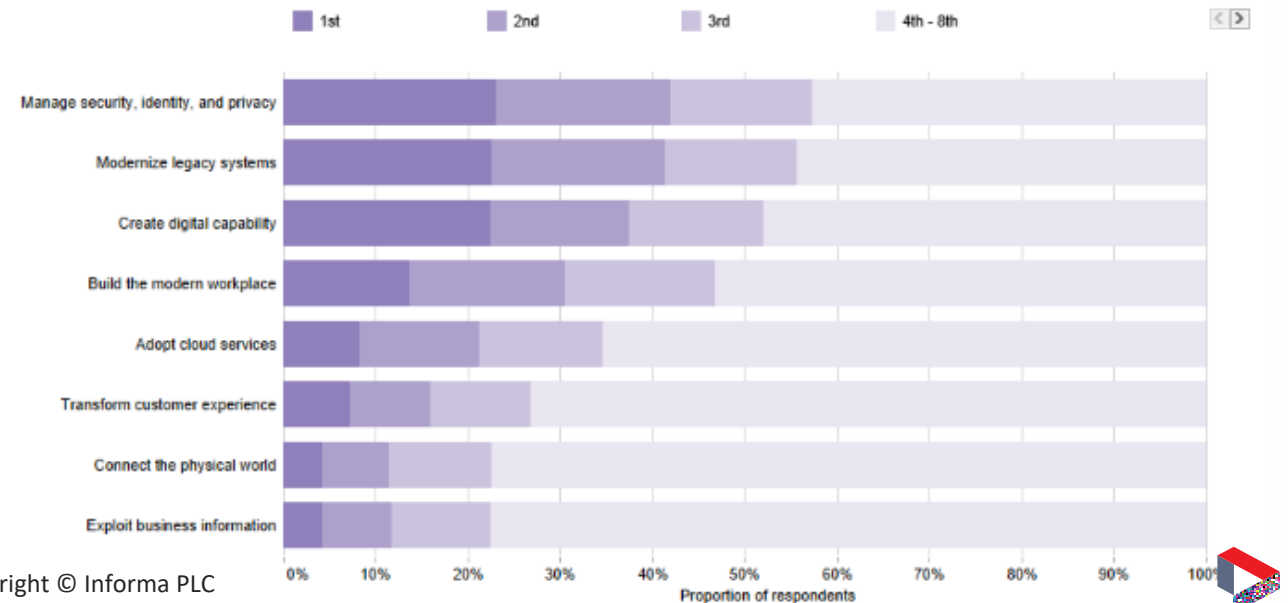


Tim Jennings
Chief Research Officer

We can help you:

- Assess the impact of emerging technologies and adapt your IT transformation strategy
- Design the most appropriate architectures and roadmaps
- Select the most suitable technology solutions for your organization

This year's important IT trends



Enterprise Decision-Maker 2019 research themes

ADVANCED DIGITAL SERVICES

- Application and services modernization
- Automation and AI technologies: providers driving business outcomes
- Targeting the large enterprise opportunity
- Successful service management

CUSTOMER ENGAGEMENT

- Digital and physical reality converge for advanced customer experience delivery
- Digital transformation will give way to continuous transformation
- New technologies allows B2Bs to embrace direct-to-consumer relationships

DATA & ENTERPRISE INTELLIGENCE

- Operationalized AI is defined by governance and transparency
- Data and AI will force enterprises to be data-driven
- The cloud removes the barriers to using ALL of the data

KEY DELIVERABLES

- Ovum Decision Matrix
- Market Radar
- Software market forecasts
- Technology reports
- Frameworks and blueprints
- Trends to Watch reports
- Enterprise case studies ICT Enterprise Insights
- On the Radar reports
- How-to-Guides and Maturity Models
- Analyst support

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- Adopting disruptive technologies

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- Cybersecurity complexity demands platform and service provider support
- Adopting a cloud-centric approach to modernize IT delivery
- Utilizing AI and automation to foster innovation in IT delivery
- New architectures for edge-computing

SoHo & SME SERVICES

- Creating the Digital SME
- Engaging the Digital SME
- Architecting the B2B channel
- Empowering the Entrepreneur



Enterprise Decision-Maker 2019 research themes

WORKSPACE SERVICES

- Mobilizing the workforce
- Evolution of enterprise collaboration
- Delivering an integrated workspace
- Enterprise use cases for 5G

EDUCATION

- Connecting the campus through data analytics
- Personalizing the education experience
- The Education Ecosystem
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TELECOMS OPERATIONS & IT

- Successful CSP strategies for digital transformation
- Intelligent operations as a source of innovation
- Radically improving customer and partner management
- Preparing telecom IT for the arrival of 5G and next-generation networks



Accelerator and Tractica Research Services

Each service delivers unrivalled and actionable insight into the impact of a technology transforming the digital economy

5G ACCELERATOR

This service is designed to help service providers, technology vendors, media organizations and internet players with action-orientated advice and market data to enable them to quickly capitalize on the impact of 5G.

CYBERSECURITY ACCELERATOR

As organizations struggle to come to terms with increasingly complex cyber security threats this service identifies best practice for enterprises and the significant opportunities for vendors and managed service providers.

TRACTICA - ARTIFICIAL INTELLIGENCE

Tractica, Ovum's sister research organization, focused on emerging technology markets, provides unrivalled data driven insight into the Artificial Intelligence technology landscape, with market sizing and shares and use cases.



5G Accelerator



“Early movers have announced their 5G launch plans, but the bulk of operators will only launch commercial services in 2020 when consumer and business devices start to become mass-market ready. However, monetization will be a major challenge and is the primary focus of Ovum’s 5G Accelerator. ”



Dario Talmesio
Practice Leader

KEY DELIVERABLES:

- Market development reports and outlooks
- Readiness indexes
- Reports on standards and spectrum requirements
- Business cases
- 5G tracker – monitoring 5G spectrum, launches, consumer tariffs, and partnerships, devices and ecosystems
- 5G connections forecasts for 227 countries
- Analyst support

The Accelerator provides a specially curated selection of 5G research from across Ovum’s portfolio.

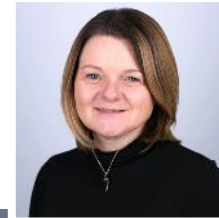
We can help you:

- Service providers: identify which strategies and business models will be most lucrative in monetizing 5G
- Vendors: understand how the technology landscape is evolving and the solutions that are gaining traction
- Media orgs. & enterprises: assess which industries will benefit the most and what the decisive 5G use cases will be



Cybersecurity Accelerator

“Today’s enterprises face a broad and evolving cyberthreat landscape and a highly complex cybersecurity picture. There is no desired end-state in an organization’s quest to address security challenges; instead a constant need to improve security posture and remain as protected as possible whilst still doing business.”



Maxine Holt
Research Director

KEY DELIVERABLES

- Strategy, market and technology reports
- Five year forecasts
- Technology assessments
- On the Radar reports
- Ovum Evaluation reports
- Analyst support

The Accelerator provides a specially curated selection of Cybersecurity research from across Ovum’s portfolio.

We can help you:

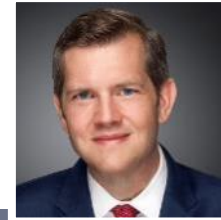
- Vendors: Tailor your products and platforms to address the most critical concerns on the enterprise security agenda
- Managed Service Providers: Identify how best to build comprehensive and robust cybersecurity solutions into your service offering
- Enterprises: Determine the risk profile of your organization and the most appropriate products and platforms for securing your systems and information



Tractica – Artificial Intelligence



“As AI enters a dynamic phase of growth with rapid adoption in the enterprise sector, concerns have emerged over issues such as data privacy and the capabilities of some of the underlying technologies. But this is to be expected as AI moves along the maturity curve. The real challenge is determining hype from reality.”



Clint Wheelock
Managing Director

KEY DELIVERABLES

- Market sizing and forecasts
- Market segmentation
- Use cases
- Market reports

CORE AI TECHNOLOGIES COVERED:

- Machine learning
- Deep learning
- Computer vision
- Natural language processing
- Machine reasoning
- Strong AI

Tractica is Ovum’s sister research organization, part of Informa, and focused on emerging technology markets.

Tractica can help you:

- Understand and quantify the market opportunities for AI across consumer, enterprise, industrial and government sectors
- Assess and forecast the potential of nearly 300 different AI use cases across major markets
- Identify the potential for and capabilities of AI’s underlying technologies



Data Services

Ovum's 2019 Data Services

Each service has a mission critical dataset at its core and comes with powerful workflow features to help you quickly assess the market and make confident decisions

WTMIS

World Telecoms and Media Information Services (WTMIS) provides forecast and historical metrics for fixed, mobile, and TV/OTT markets. It delivers unique consolidated market views, providing detailed insight into these converging markets by territory and operator.

TARGET

Revolutionise your sales planning and target identification with data on thousands of technology contracts and the ICT spend estimations for 60,000 organizations globally.

FORECASTER

A complete view of the converging TMT market: market sizing and five-year forecasts using a consistent taxonomy allowing you to compare and plan for future demand viewed by technology, region or country.

INSIGHT

Survey Intelligence: leverage the largest annual IT decision-maker survey to discover and act on evolving enterprise attitudes to technology investment, or our consumer survey program to understand the digital consumer.

[LEARN MORE ABOUT FORECASTER](#)

[LEARN MORE ABOUT TARGET](#)



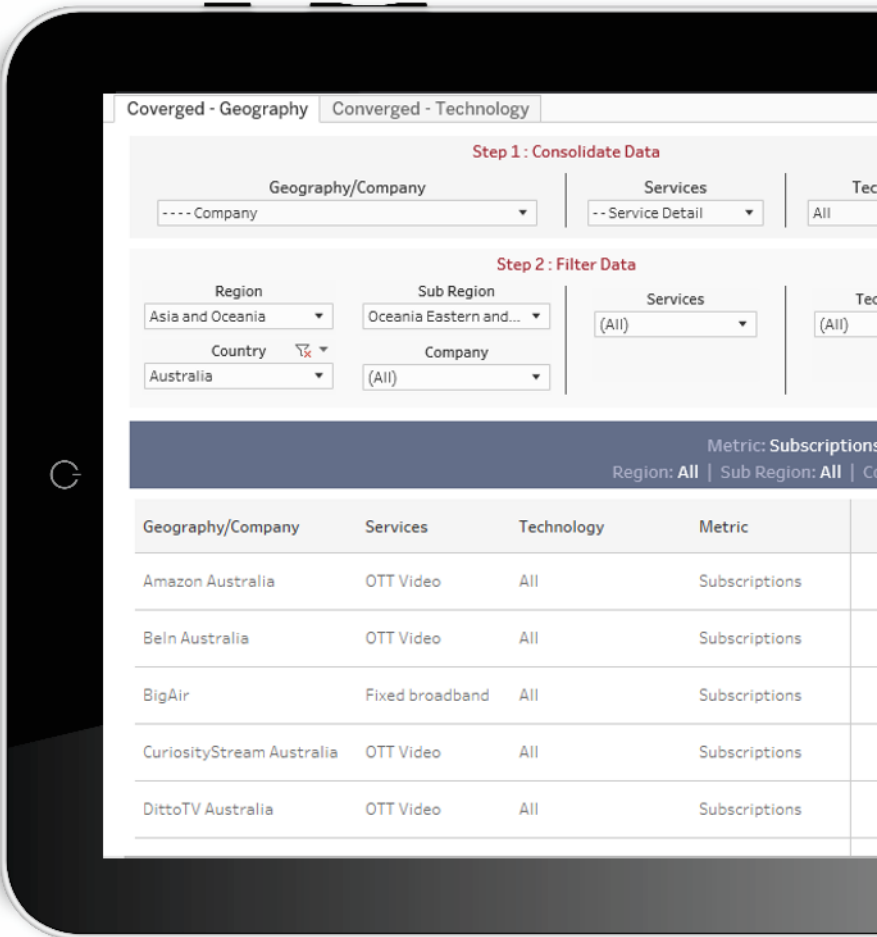
World Telecoms and Media Information Service (WTMIS)

Companies operating in rapidly changing telecommunications and media markets require accurate and up-to-date market data when making critical decisions. WTMIS provides forecast and historical metrics for fixed, mobile, and TV/OTT markets. It delivers both discreet and converged market views, for 220 territories, with metrics for 2,500 operators globally.

WTMIS’ intuitive four step query builder provides a simple route to understanding future demand across your markets.

WTMIS will help you:

- Analyse the interplay of converging technologies
- Assess the substitution impact of both pure play and traditional services on core revenues
- Identify which new services will generate the highest revenues in each market segment



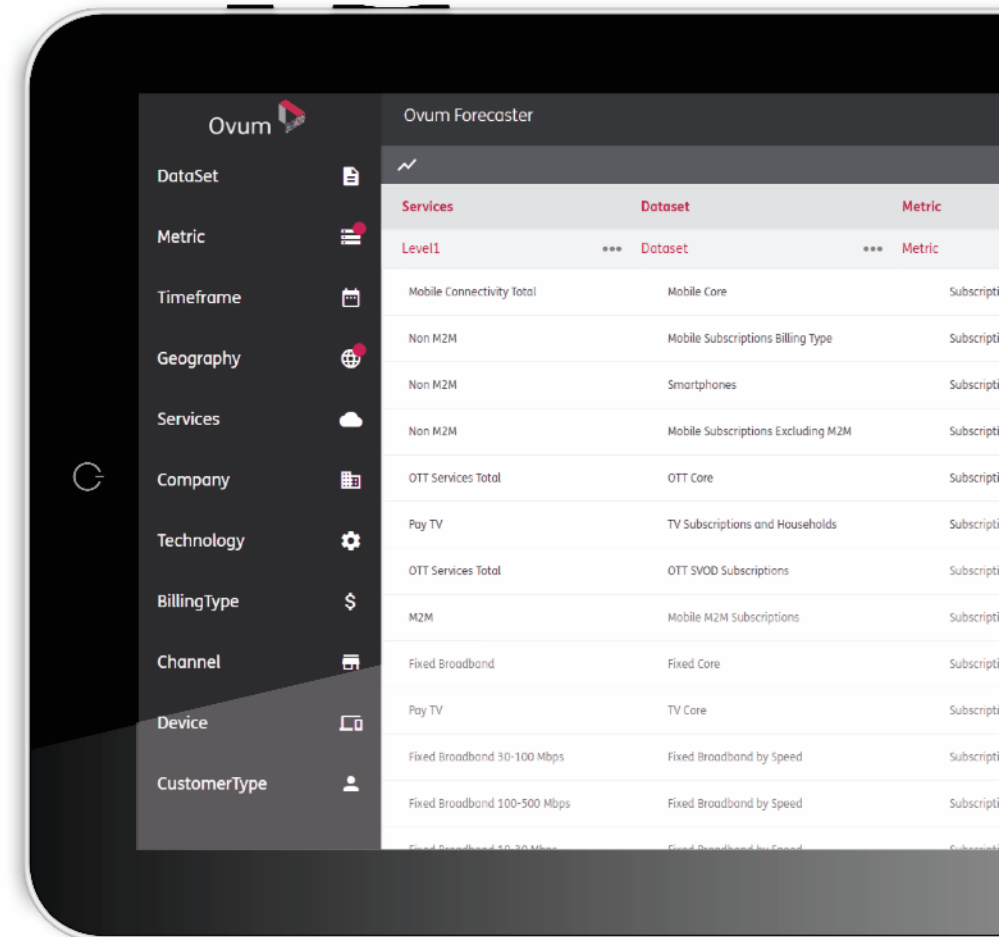
Forecaster

To take full advantage of new market opportunities, strategists need a comprehensive, accurate and up-to-date view on forecast demand. Only with this essential understanding can organizations effectively target new opportunities and set winning strategies. Forecaster is home to more than 100 detailed five-year forecasts covering technology, media and telecoms.

Forecaster provides the most reliable in-depth five-year market forecasts with coverage at global, regional, and country levels

Forecaster can help you:

- Gain a comprehensive picture of the evolving TMT market
- Compare forecasts for multiple markets segmented by a consistent taxonomy
- Incorporate the latest data and forecasts in your own information system with API access

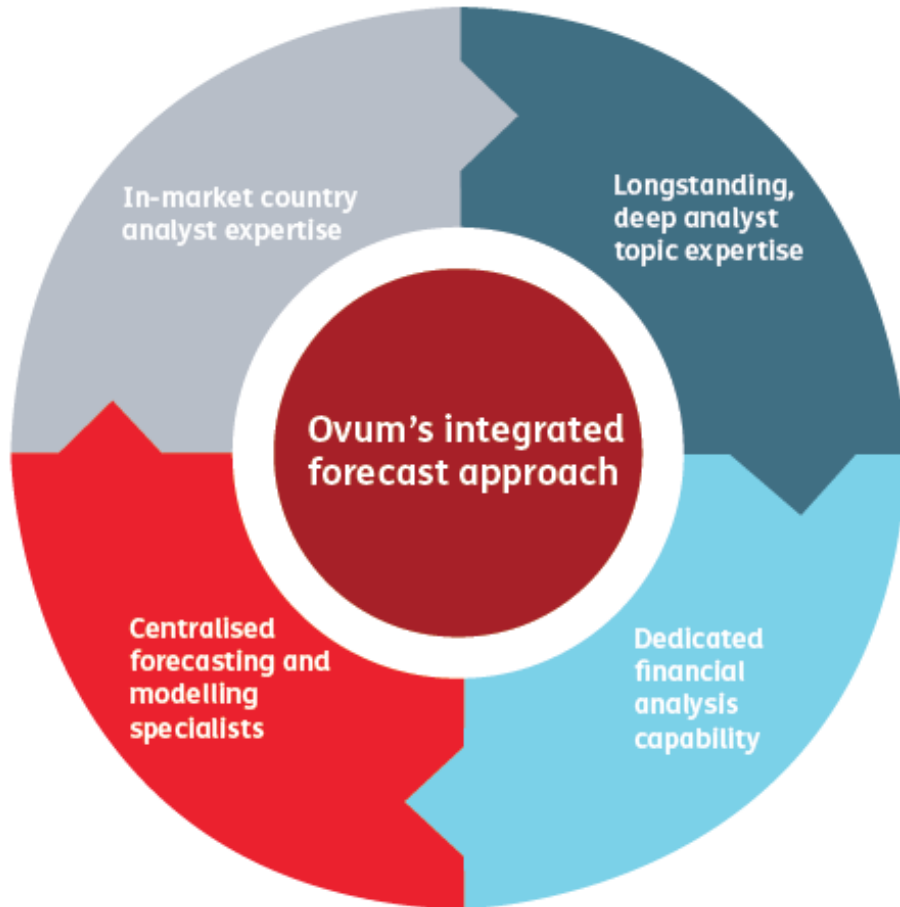


The screenshot displays the Ovum Forecaster web application. On the left is a dark sidebar with a navigation menu containing categories like DataSet, Metric, Timeframe, Geography, Services, Company, Technology, BillingType, Channel, Device, and CustomerType, each with an icon. The main content area is titled 'Ovum Forecaster' and features a table with three columns: Services, Dataset, and Metric. The table lists various market segments and their corresponding forecast metrics.

Services	Dataset	Metric
Level1	Dataset	Metric
Mobile Connectivity Total	Mobile Core	Subscripti
Non M2M	Mobile Subscriptions Billing Type	Subscripti
Non M2M	Smartphones	Subscripti
Non M2M	Mobile Subscriptions Excluding M2M	Subscripti
OTT Services Total	OTT Core	Subscripti
Pay TV	TV Subscriptions and Households	Subscripti
OTT Services Total	OTT SVOD Subscriptions	Subscripti
M2M	Mobile M2M Subscriptions	Subscripti
Fixed Broadband	Fixed Core	Subscripti
Pay TV	TV Core	Subscripti
Fixed Broadband 30-100 Mbps	Fixed Broadband by Speed	Subscripti
Fixed Broadband 100-500 Mbps	Fixed Broadband by Speed	Subscripti
Fixed Broadband 10-30 Mbps	Fixed Broadband by Speed	Subscripti



Ovum's forecasting expertise is unparalleled



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.

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.



Forecaster - A suite of data services designed to save you time



Consumer & Entertainment Services

Services and technologies including smart home, wearables, digital assistants, smart hubs etc



Enterprise Services

Services enabling onsite ICT to cloud, including VPN, workforce optimization, BYOD, and cloud services



Enterprise Verticals

Forecasts for ICT spending in banking, insurance, payments, government, education, healthcare & other verticals



IT

Forecasts for services and technologies enterprises are using for digital transformation including cloud, software, integration, security



Internet of Things

IoT related services and technologies, including digital assistants, AI capable devices, M2M connections and smart home services



Service Provider Technology

Core technologies that enable the delivery of new consumer and enterprise services including NFV, 40G/100G/200G OC, OSS/BSS, DCI, CDN

Each module is supported by Ovum's analyst team, providing both quantitative and qualitative market intelligence

World Telecoms Financial Benchmarks (WTFB)

Ovum's World Telecoms Financial Benchmarks (WTFB) provides detailed financial and operational KPIs for leading global operator groups. The Interim Report tracks reported quarterly financial and operational KPIs. Benchmarks are our quarterly insight slides. The Guidance Tracker covers financial outlooks and the Financial Analysis Report calculates comprehensive financial ratios.

Financial data and assessments by leading industry group offering performance benchmarking against the industry as a whole

WTFB will help you:

- Gain industry metrics Insight into key telecoms players, including industry specific metrics and aggregates
- Analyse performance in line with company reporting schedules
- Understand recent financial developments, with both insight and data

KEY DELIVERABLES

- Interim report
- Telecoms Industry and Operator Benchmarks by Key Financial Metrics
- Financial Analysis report



Target

Building and converting a healthy pipeline of enterprise opportunities is vital for business growth, yet time consuming and resource intensive. To succeed you need to identify the most lucrative prospects, target them at the right time and with the right proposition. To achieve this you need deep insight into ICT demand at both the market and account level.

Ovum's Target suite provides a unique blend of enterprise demand intelligence to power the most sophisticated prospecting strategy.

A circular graphic with a purple-to-blue gradient. It features concentric circles, radial lines, and several bright white light spots. The text "ICT SPENDING PREDICTOR" is centered in white capital letters.

ICT SPENDING PREDICTOR

+

A circular graphic with a dark red-to-black gradient. It features concentric circles, radial lines, and several bright white light spots. The text "CONTRACTS INTELLIGENCE" is centered in white capital letters.

CONTRACTS INTELLIGENCE

Unique proprietary spend data

Thousands of deals in dynamic markets



Target - ICT Spending Predictor

Account prioritization and share of wallet intelligence by industry and region

Use **ICT Spending Predictor** to identify:

- Which prospects have the largest ICT budget
- Which accounts sales and marketing should prioritize
- How ICT spending breaks down by segment and channel for each of your accounts
- The proportion of your customers' ICT spend by technology you currently receive

Build target lists of companies prioritized by ICT spend for 138 countries and 19 industries:

Construction and real estate, financial markets, government, healthcare, higher education, insurance, retail banking, telecommunications, transport and logistics, travel and tourism, utilities, wholesale and distribution



Target - ICT Spending Predictor - coverage

View comprehensive ICT spending profiles with two views of spend for 60,000 organizations globally, or generate a custom spend profile with your own firmographic criteria.

ICT spend by technology function

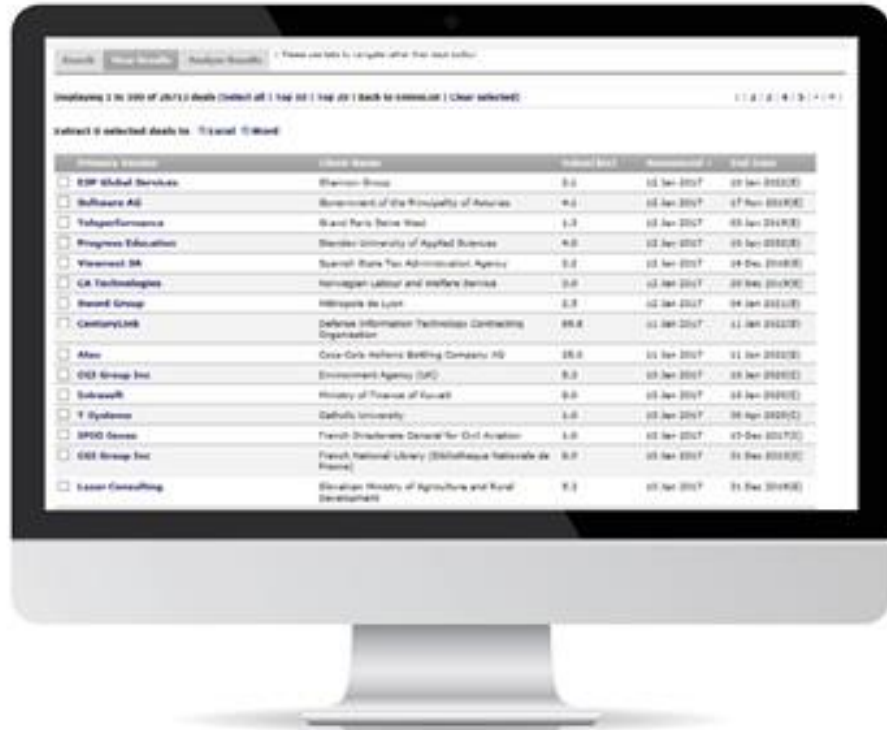
Applications Software support & maintenance Software licenses SaaS App management & maintenance App development & testing Internal application spend	IT management Systems planning and design Disaster recovery & continuity IT strategy and transformation Internal IT management
Infrastructure Servers & storage End-user computing Peripherals IaaS & PaaS Data center & IT operations Service desk End-users computing services Internal infrastructure spend	IT Security Staffing & facilities Consulting Hardware Outsourced & managed services Software
	Network & Communications Local area network Fixed broadband Mobile voice & mobile data Fixed telephony & unified-communications Wide area network Contact center Internal communications spend

ICT spend by technology type

Services App management & maintenance Application development & testing Data center & IT operations Service desk End-user computing	Communications Fixed voice Contact center Mobile data & mobile voice Fixed broadband
Software Software support & maintenance Software licenses	Cloud IaaS PaaS SaaS
Consulting Systems planning & design Disaster recovery & continuity IT strategy & transformation	Internal Infrastructure Applications Communications IT management
Hardware Servers & storage End-user computing Peripherals Local area network Wide area network	IT Security Staffing & facilities Consulting Hardware Outsourced & managed services Software



Target - Contracts Intelligence



Company Name	Client Name	Contract Size	Renewal Date	End Date
<input type="checkbox"/> BNP Global Services	Baron Group	5.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Bullware AG	Government of the Principality of Asturias	4.0	15 Jan 2017	17 Jan 2018
<input type="checkbox"/> Telaportance	Grand Paris Seine Nord	1.8	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Progress Education	Swedish University of Applied Sciences	4.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> VMware SA	Spanish State Tax Administration Agency	5.0	15 Jan 2017	14 Dec 2018
<input type="checkbox"/> CA Technologies	Norwegian Labour and Welfare Service	3.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Borel Group	Ministry of Justice	2.8	15 Jan 2017	14 Jan 2018
<input type="checkbox"/> CenturyLink	Defense Information Technologies Contracting Organisation	15.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Altec	Coca-Cola Refreshments Bottling Company AG	15.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> G3 Group Inc	Environment Agency (UK)	5.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Software	Ministry of Finance of Kuwait	5.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> T Systems	Catholic University	1.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> SPAD Group	French Directorate General for Civil Aviation	1.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> G3 Group Inc	French National Library (Bibliothèque Nationale de France)	5.0	15 Jan 2017	15 Jan 2018
<input type="checkbox"/> Euron Consulting	Swedish Ministry of Agriculture and Rural Development	5.0	15 Jan 2017	15 Jan 2018

Comprehensive deals intelligence for IT services, telecoms equipment, telecoms OSS/BSS and banking software markets

Identify and target accounts with contracts due for renewal over the next 12 months

Use Contracts Intelligence to:

- Win more deals with better knowledge of contract renewal dates, spending levels and competitor intelligence
- Outsmart your competitors with insight into their client base
- Plan your acquisition strategy – assess market potential by customer segment, deal size, region, service area or solution
- Form pre-emptive counter bids against incumbent suppliers
- Expand your pipeline to compete in more deals at the optimal time



Target - Contracts Intelligence Market Coverage



Target – IT Services Contracts

Summaries for more than 30,000 contracts worth over \$1m signed across the IT services market globally. Coverage is for 43 service types across BPO, Cloud Services, Consulting, IT Outsourcing, Network Deployment and Systems Integration. One of the largest IT services deals databases available, with an archive of over 20 years



Target – Telco OSS/BSS Contracts

Deals profiles covering telecoms customer, data, network, revenue and service/applications management for the last 10 years



Target – Telecom Vendor Contracts

The most comprehensive source of intelligence on telecoms equipment deals covering 55 segments across Cloud, Connectivity, Fixed access, IP infrastructure, M2M/IoT, Mobile Payments, Consulting, Software, Transport, Video, Voice and Wireless.



Target – Banking Software Contracts

The most effective tool for tracking banking platform investment activity by region, country, institution or vendor. Analyze over 9,000 contracts for 550 vendors across 34 technology categories globally.



Insight - ICT Enterprise Insights

To focus on the markets with the most potential you need highly granular market data. ICT Enterprise Insights provides an interactive interface to the largest annual survey of ICT decision-makers. Drawing on the opinion of 6,600 respondents in 62 countries and 14 major industries it enables you to identify variances in demand across your segments.

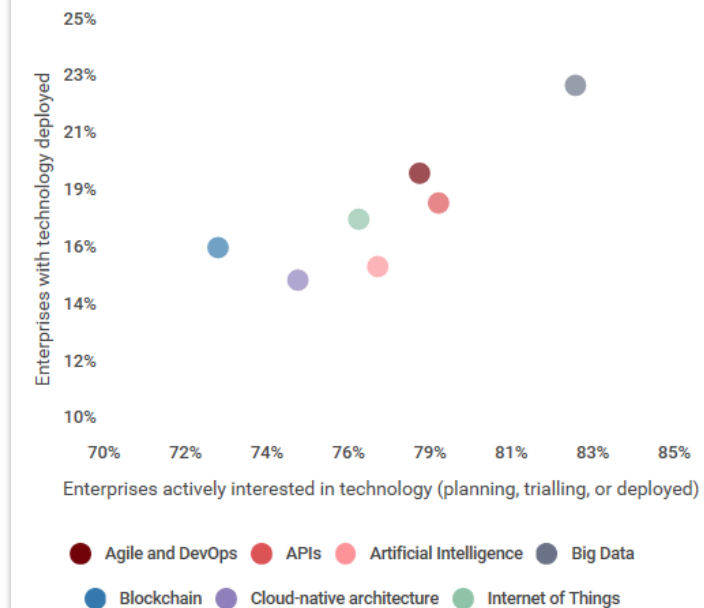
Unrivalled insight into the investment priorities and hot issues for your target buyers

ICT Enterprise Insights will help you:

- Gauge each market segments' IT budget growth and composition, investment plans, and digital transformation maturity
- Gain unrivalled insight into the spending intentions for cloud, IoT, mobility, analytics, security, and engagement
- Delve into the hot issues in retail banking, insurance, financial markets, payments, telecoms, retail, media, healthcare, education, utilities, and government

The key enabling technologies for digital transformation

The technologies enterprises are currently deploying or considering for digital transformation.

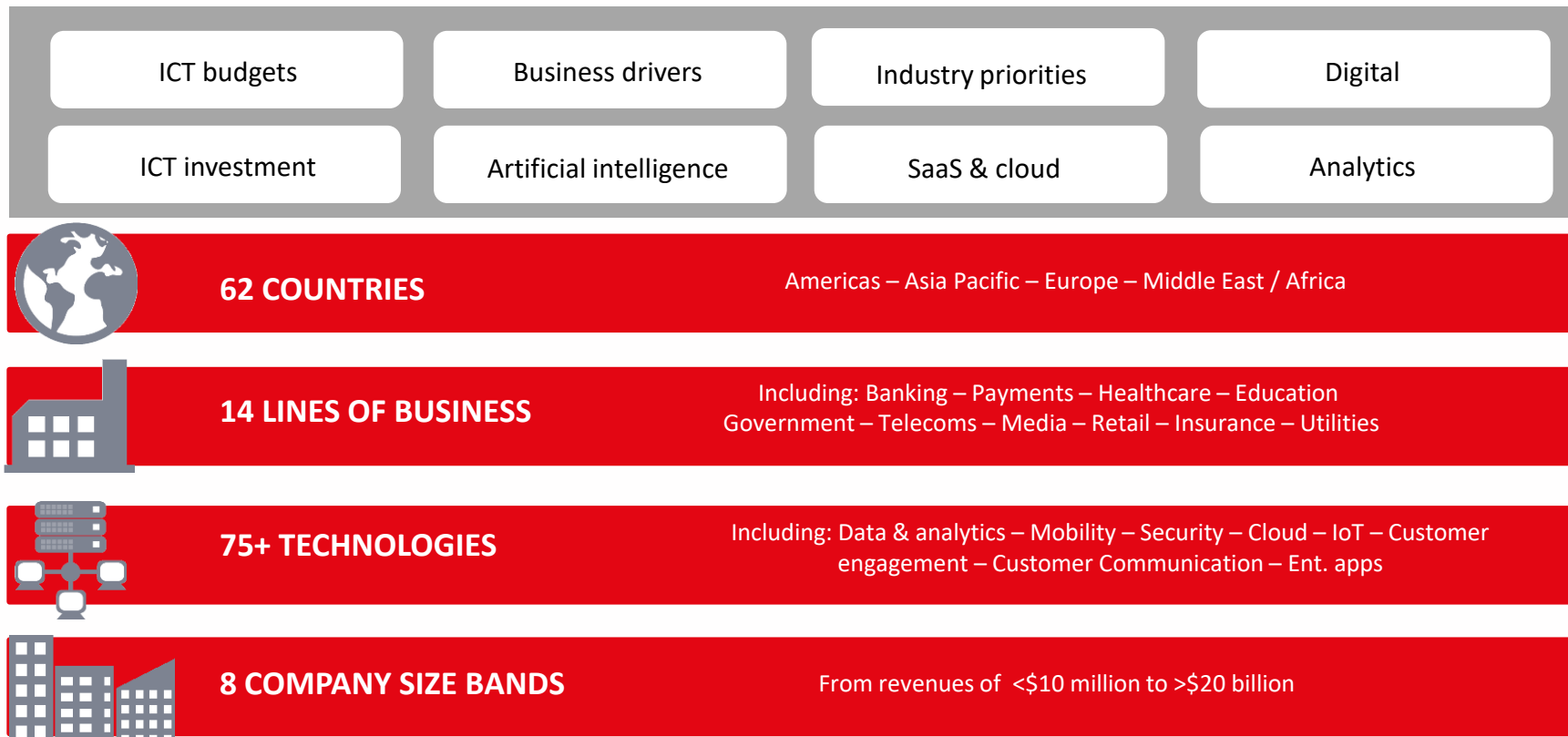


ICT Enterprise Insights 2019



Insight - ICT Enterprise Insights coverage

6,600+ ICT decision makers



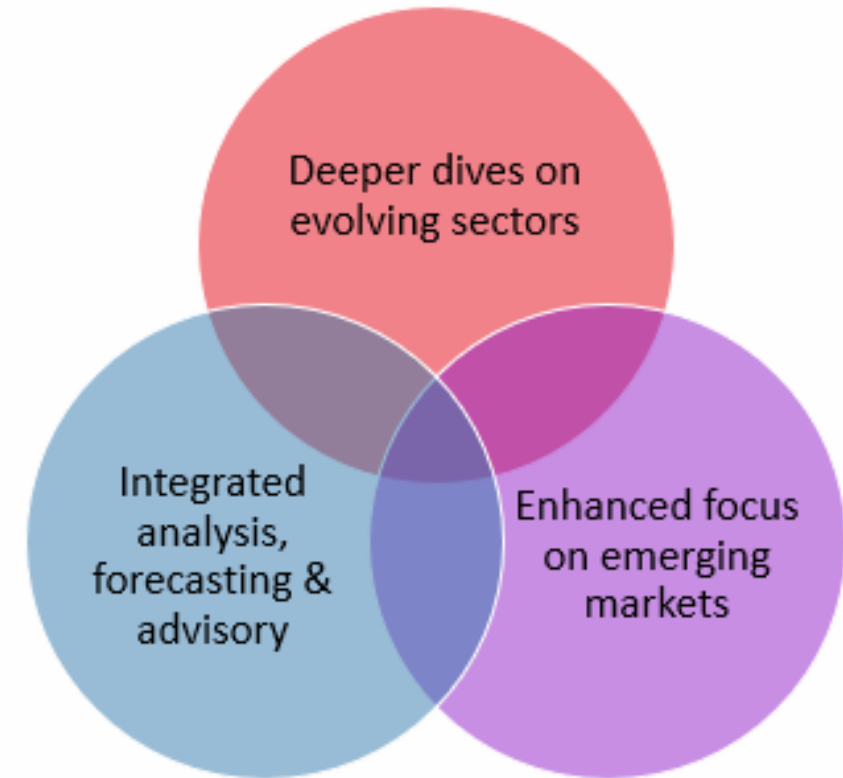
Insight – Digital Consumer Insights

Digital technologies have put the consumer firmly in charge. With consumers driving change, it's vital for service providers to have a deep understanding of consumer expectations and behaviour when devising new products and deciding which markets to enter. Discover, understand, and act on changing consumer attitudes to communications, content and commerce.

Digital Consumer Insights is based on a series of consumer surveys addressing the disruptive trends too nascent to be covered by conventional data and forecasts

Digital Consumer Insights will help you:

- Understand consumer behaviour and identify new opportunities
- Evaluate and plan new market entry and identify potential partners
- Validate your product strategy and create messaging that resonates



Consulting Services

Ovum's 2019 Consulting Services

Ovum Consulting consistently delivers against clients' project objectives by combining longstanding TMT expertise with the most complete set of industry data available

WHERE TO PLAY

Discover which market segments, geographies, and partners to prioritize using data and forecasts of unrivalled depth and breadth

HOW TO SELL

Optimise your go-to-market strategies by identifying the best segmentation feature-set, pricing, bundling, partnership options for your organization

WHAT TO DELIVER

Create compelling products and services based on data on consumer and enterprise behaviour, market trackers, and service provider benchmarks



Where to play: identifying and assessing growth opportunities

We help our customers determine:



Size of the growth 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.



What to deliver: Exploiting the growth opportunities

We help our customers go to market to exploit growth opportunities by advising on:



Market demand, how it is changing, and what is required to become 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 us to exploit these growth opportunities

Our market, competitor and channel expertise gives our customers the specific, actionable insight necessary for them to achieve commercial success.



How to sell: understand **who** to target to increase sales effectiveness and 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.



Contact us to learn more



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Asia Pacific: +61 3 960 16700



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