

RESEARCH AGENDA 2019

SERVICE PROVIDER MARKETS

Service Provider Markets



Mike Roberts

Research Director

Service Provider Markets

“ Service providers need innovative strategies, services, and technologies to thrive as markets converge, consolidate, and expand into new digital segments. Traditional communications businesses are under attack, and new digital services and players are taking off. However, the pace, scale, and strategic implications of change vary significantly by service provider, country, region, and market segment. ”

Service Provider Strategies

The Market Challenge

Service providers worldwide are at a strategic crossroads. They are balancing the need to defend and innovate around their massive but mature mobile, broadband, and TV businesses – which are driving the bulk of their revenues – with investing in new digital platforms and services such as 5G, OTT, and IoT.

Transformation is high on the agenda as service providers drive both innovation and cost reduction across their consumer and enterprise services and internal operations, with new digital tools such as virtualization, digital customer service, and artificial intelligence (AI).

Disruption is a given as digital giants consume traditional markets and service providers transform their strategies, operations, and services to survive and thrive amid the digitization of their markets.



How Ovum helps you

Transform your strategy based on the best practices of leading communications and digital service providers worldwide.

Learn how leading service providers are developing new strategies and services around emerging technology platforms such as 5G, IoT, and AI.

Assess the health and outlook of the mobile, broadband, and TV markets worldwide through five-year forecasts with segmentation by region and major countries.

CONTACT US



Mike Roberts
Research Director

“Global mobile, broadband, and pay-TV revenues will top \$1.5 trillion in 2022, driven by more than 11 billion connections.”

Key Deliverables



Global Mobile, Broadband, and TV Forecasts – understand the growth and outlook for the industry's key segments with detailed global forecasts on the industry's massive but maturing mobile, broadband, and TV segments.



5G Service Provider Tracker – learn the 5G launch plans and strategies of service providers worldwide.



Telco Services Innovation Radar – gauge where service providers are innovating and investing with a detailed global tracker on telco service launches by segment, with case studies and analysis on the most innovative and successful services.



Service Provider Reports – assess best practice and learnings through annual reports on the world's top 40 service providers.



Financial Benchmarks – benchmarking and analysis of major service providers worldwide on subscriptions, revenues, capex, M&A, and other KPIs.



Mobile Subscription and Revenue Forecasts – gain insight into the state of the mobile market by region and major countries with detailed mobile subscriptions and revenue forecasts.



Fixed Broadband Subscription and Revenue Forecasts – assess the state of the fixed broadband market with detailed subscription and revenues forecasts.

Themes for 2019

5G service provider strategy, services, and market outlook

5G will drive the biggest change in the communications industry since the transition from voice to data services, but it won't happen overnight. Ovum will assess the impact of 5G on service provider strategy, services, subscriptions, and revenues; first as it improves mobile and fixed broadband services in its initial phase, but then as it increasingly drives network and service transformation, creating significant new market opportunities and disruption.

Mobile, broadband and TV markets to 2024

Mobile, broadband and pay-TV markets are maturing and under threat from digital players. However, they still drive the majority of subscriptions, revenues, and margins for communications services providers. Track the size, health, and future of the industry's core services through regular in-depth subscription and revenues forecasts for mobile, broadband, and TV services through to 2024, with segmentation by region and major countries.

Service launches and innovation by segment

Every service provider has to innovate, but some do it better than others, driving differences in service provider results, market share, and industry leadership. Learn from innovators across the telecoms, media, and technology markets, whether it be digital giants, traditional telcos, or disruptive startups, via detailed global tracking of service launches in more than 20 segments. These include IoT, OTT, TV/video, security, mobile money, and customer loyalty, all enhanced by case studies on the most successful new services.

Market convergence and consolidation

The nexus of competition is expanding across major segments such as mobile, broadband, TV, and OTT, as digital giants such as Facebook, Amazon, Apple, Netflix, and Google disrupt and dominate markets. Assess the impact on both communications and digital service providers through tracking and analysis of fixed-mobile convergence (FMC) services and industry M&A.

Service provider strategy and performance benchmarking

Service providers globally are developing new strategies and services to adapt to fast-changing markets. Learn which service providers are succeeding and which are struggling via in-depth analysis and data on service provider strategy and performance, delivered through regular reports and financial benchmarks – including service revenues and capex – on the world's top digital and communications service providers.

What's new

5G Market Outlook 2019–24 – evaluate the impact 5G will have on service provider strategies, operations, and services with 5G market analysis and five-year forecasts.

FAANG: Its impact on Service Providers - learn how Facebook, Amazon, Apple, Netflix, and Google are impacting communications service providers, both globally and regionally.

Global Mobile, Broadband, and TV Outlook 2019–24 – assess the outlook for the three largest segments in the TMT market with detailed forecasts and analysis by region, country, and segment.

Global Mobile Market Outlook 2019–24 – understand the future of the near \$1 trillion global mobile market with detailed forecasts and analysis by region, country, and segment.

Americas

The Market Challenge

The race for 5G is on, and US service providers are moving fast with a view to using the new technology platform to build a competitive edge and unlock new markets, as they did to a degree with the early adoption of 4G LTE.

2019 will also see the early impact of major consolidation including horizontal, as in the case of T-Mobile and Sprint (pending approval), and vertical, like AT&T's acquisition of Time Warner. Telcos are betting billions that a much larger scale and reach will help them to regain some of the market power and share seized by digital OTTs in North America and beyond.

In Latin America, 4G will become the leading wireless technology at the same time that the region sees the first spectrum auctions for 5G, but telcos will face difficult strategic decisions. A key goal will be to prepare networks and end-users for 5G while continuing to improve 4G services. But capex will remain under tight control, so service providers will have to make tough decisions about what to cut in order to fund focused 4G and 5G investment.



How Ovum helps you

Regional outlook reports analyze market trends and the competitive dynamics at the country, operator, and regional level, based on primary research and Ovum's integrated forecasts.

Case studies, operator and country profiles, and topical reports provide a full assessment of the status of the business, enriched by Ovum's regional analysts' recommendations.

Detailed market data and integrated forecasts deliver the insights customers need to understand key markets and trends.

CONTACT US



Ari Lopes
Principal Analyst

“Ovum forecasts that Latin America will have 9.6 million mobile 5G subscriptions by 2022, marking the beginning of the gradual migration from 4G to 5G services in the region.”

Key Deliverables



Regional Outlook Reports – quarterly regional reports providing detailed analysis about market data and developments, with recommendations for major market players.



Country Reports – profiles of the major country markets within the region, including comprehensive market data and analysis.



Operator Reports – detailed portraits and analysis of the major operating groups within the Americas, including financial and operational KPIs.



Case Studies – detailed assessments of specific service deployments in the Americas.



Regional and Country Datasets – comprehensive set of data and forecasts for the region and every country within it.

Themes for 2019

US service provider consolidation and convergence

Constrained by OTTs' success, the leading US-based telcos and cablecos have embarked on an aggressive acquisition strategy. While in the past these companies failed to compete with OTTs by simply launching similar services, the strategy is now to secure exclusive rights for premium content and to use one of their core strengths – vast distribution channels – to gain market share. Ovum will assess how successful these strategies can be.

Americas 5G service provider strategy, services, and market outlook

The US is set to be a global leader in 5G much as it was with 4G, so Ovum will track the 5G strategies, launches, and services of US service providers to help clients worldwide to tailor their own 5G strategies. Starting with 5G services for fixed and mobile broadband, service providers will then use the platform to expand into new consumer and enterprise segments. However, they will face a host of strategic, technical, and commercial challenges along the way.

Americas service provider innovation

Acquisitions will allow operators to reduce costs, expand distribution channels, and offer premium content, but innovation will remain a key challenge for a sector that needs to drive growth in both existing and new markets. Ovum will assess innovation strategies in the region across sectors such as digital media, video, IoT, cloud, and networks, via a detailed market tracker and case studies on innovative services.

Americas service provider digital strategies

Americas service providers are increasingly focusing on digital strategies, including the transformation of their own operations as well as the development of new services. Ovum will profile and assess the digital strategies of major operators across the Americas and track the development of digital-service sectors such as OTT, IoT, digital media, and mobile financial services.

Broadband everywhere in the Americas

4G flexibility will ensure this technology will remain relevant for Latin American operators for years to come. LTE-A will provide the bandwidth boost needed to enhance mobile broadband experiences and LTE-M/NB-IoT will support telcos' inroads to the IoT. Ovum's analysis will focus on the opportunities in mobile broadband as well as the necessary steps to prepare infrastructure for the arrival of 5G. Best practices and learnings from the region will also be highlighted.

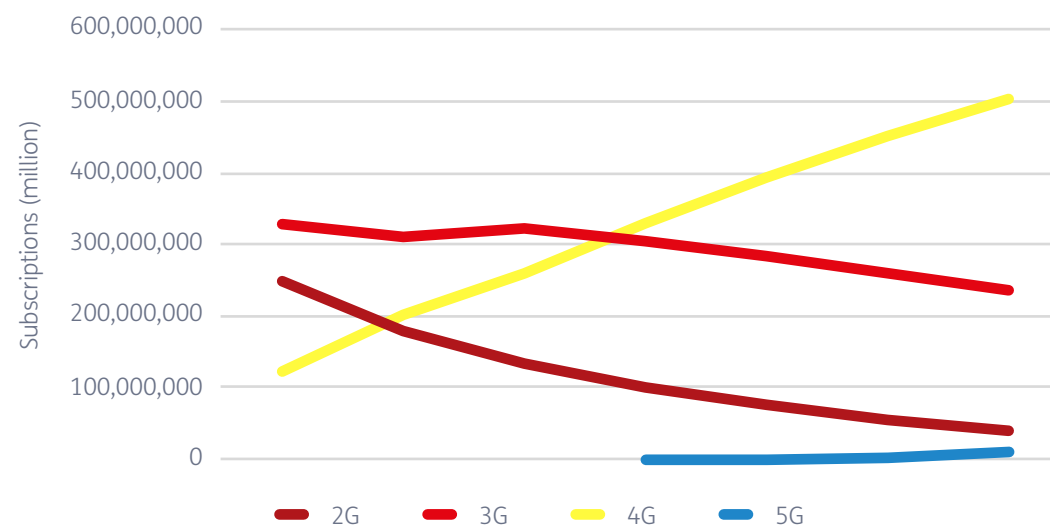
What's new

Improved country reports – major country reports have been extended to cover the TV and OTT market, as well as mobile and broadband.

FAANG regional strategy reports – a new series of reports revealing the regional strategies of Facebook, Amazon, Apple, Netflix, and Google, and their impact on service providers and markets in the region.

Consumer Insights regional reports – regional reports based on consumer surveys will give fresh insight into regional markets.

Latin America, mobile subscriptions per technology, 2016-22 (million)



4G will become the leading mobile platform in Latin America in 2019 just as the first 5G services are launched and 3G starts to decline in earnest. Ovum expects that improved mobile broadband and Internet of Things services will encourage operators to keep investing in 4G for the foreseeable future, leading to a slow start for 5G through 2022.

Asia

The Market Challenge

Operators in Asia face the combined challenge of slowing subscription growth, continued core product commoditization, intensifying competition from both traditional and next-generation players, and the challenge of funding next-generation access networks and data capacity.

Consumers are freely accessing content and services from a vast number of suppliers. Many traditionally telco-related areas such as messaging are now dominated by OTT players. In response, operators are implementing innovative bundling strategies and are making their own forays into digital sectors, including commerce, messaging, video, gaming, and music.

In enterprise markets such as mobility, cloud, and IoT, competition from IT service providers and other telcos is fierce. Success in one industry vertical does not necessarily translate to others. Service providers must therefore consider how to best position themselves if they are to capture their share of these opportunities.

RESEARCH AGENDA 2019



How Ovum helps you

In-depth reports track and analyze market data, competitive dynamics, and major trends at the country, operator, and regional level, and make recommendations to service providers and other market players.

Case studies, profiles, and topical reports set out and assess significant telco initiatives in the region, such as digital-service deployments, enterprise strategies, and the launch of 5G.

Comprehensive market data and forecasts allow customers to size and compare markets, identify quantitative trends, and develop strategies based on quantitative analysis.

CONTACT US



David Kennedy
Practice Leader

“By the end of 2022, Asia will have only 531 million 2G subscriptions, down from 1.42 billion at end-2018, a CAGR decline of 22% per annum.”

Key Deliverables



Country Reports – profiles of the major country markets within the region, including comprehensive market data and analysis.



Operator Reports – detailed portraits and analysis of the major operating groups within Asia, including financial and operational KPIs.



Case Studies – detailed assessments of specific service and regulatory deployments in Asia



Regional and Country Datasets – comprehensive set of data and forecasts for the region and every country within it.

Themes for 2019

Asia service provider digital strategies

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

Asia 5G service provider strategies, services, and market outlook

Asia will become the largest regional market in the world for 5G once China's deployment gets underway. Ovum will track the move to 5G in Asia by analyzing market data, the leading operators' 5G strategies, and related regulatory developments (particularly spectrum).

In addition, Ovum will address topics such as next-generation LTE, new M2M and IoT networks, fiber for ultra-broadband deployment, and network strategies for rural and remote areas; all via analysis and case studies.

Asia service provider innovation

The Asian market is increasingly competitive and sophisticated, and service providers need to develop innovative products that will help them to stand out from their rivals, win and retain customers, and develop new revenue streams. Ovum will monitor and analyze price, product, and service innovation in Asia, identifying trends and making recommendations to providers.

Asia enterprise markets

Ovum will report on the progress of Asian enterprise and wholesale markets, as operators deploy cloud and IoT technologies and services. Ovum will also monitor and analyze cloud and IoT developments and prospects within the region, and will make recommendations about provider and regulatory strategies.

China is the powerhouse of a diverse region

Asia accounts for more than half of all mobile subscriptions worldwide, with the two Asian mega-markets of China and India each having more than a billion subscriptions. South Korea, Singapore, Hong Kong, and Japan are among the most advanced telecoms markets in the world, but some others within the region are much less developed. Ovum will monitor and analyze the complexities of this huge and influential regional market.

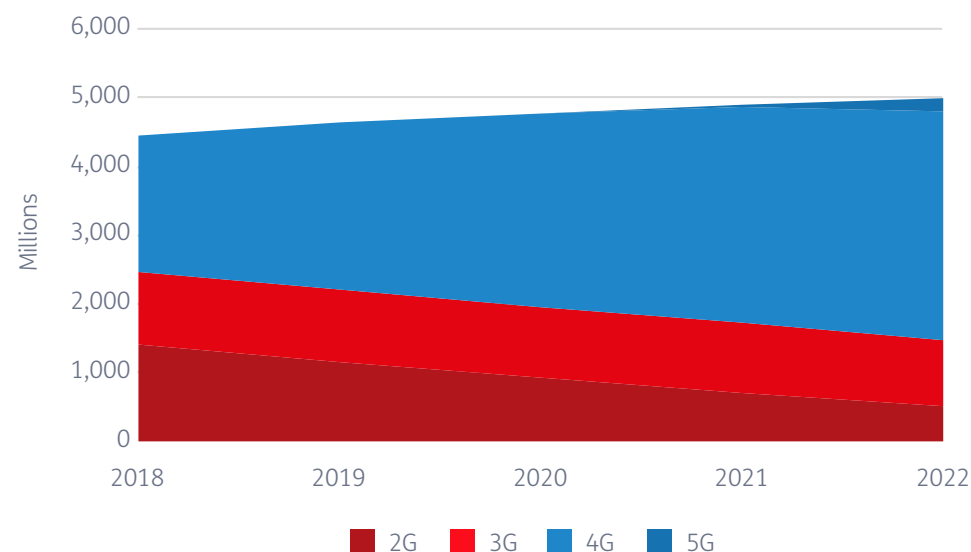
What's new

Improved country reports – country reports have been extended to cover the TV and OTT market, as well as mobile and broadband.

FAANG regional strategy reports – a new series of reports revealing the regional strategies of Facebook, Amazon, Apple, Netflix, and Google, and their impact on service providers and markets in the region.

Consumer insights regional reports – regional reports based on consumer surveys will provide fresh insight into regional markets.

Asia, mobile subscription forecasts by technology, 2018-22



Although growth is slowing, Asia remains the biggest regional mobile market in the world with the number of mobile subscriptions forecasted to increase from 4.46 billion at end-2018 to 4.99 billion at end-2022. Asia will also be the single biggest region for 5G by the end of 2022, when it is expected to have 195 million 5G subscriptions, of which 125 million will be in China.

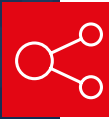
Europe

The Market Challenge

Economically, Europe is performing well, but telecoms operators have failed to align market performance to economic growth. At best, telecoms operators align their prices to inflation, the relentless search for new growth areas continues to disappoint (in absolute terms), while the pressure to invest in new spectrum, 5G networks, and fiber will be mounting in 2019.

Competition remains severe and consolidation – where allowed – is only partially offsetting market pressure. Bundling is negatively affecting mobile prices.

Will FAANG have an appetite to disrupt the connectivity business? If so, how? OTTs are finally seen as partners rather than competitors, but underlining nervousness about web-scale operators persists.



How Ovum helps you

In-depth reports track and analyze market data, competitive dynamics, and major trends at the country, operator, and regional level, and make recommendations to service providers and other market players.

Case studies, profiles, and topical reports set out and assess significant initiatives and developments in the region, such as digital strategies and services, FMC, and the prospects for 5G.

Comprehensive market data and forecasts allow customers to size and compare markets; identify trends, risks, and opportunities; and develop strategies based on statistical evidence.

CONTACT US



Dario Talmesio
Practice Leader

“5G will ignite a new phase of growth and disruption approaching 10% penetration in Europe by 2022.”

Key Deliverables



Regional Outlook Reports – quarterly regional reports providing detailed analysis about market data and developments, with recommendations for major market players.



Country Reports – profiles of the major country markets within the region, including comprehensive data and analysis for the telecom and TV sectors, including OTT-TV.



Operator Reports – detailed portraits and analysis of the major operating groups within the MEA region, including financial and operational KPIs.



Digital Operator Profiles – studies of the digital strategies of major operators in the region.



Case Studies – detailed assessments of specific service deployments in the MEA region.



Regional and Country Datasets – comprehensive set of data and forecasts for the region and every country within it.

Themes for 2019

5G launches in Europe – create your proposition now

Europe is preparing for a 5G shake-up in 2019 as service providers start to invest in 5G networks and develop new customer propositions. Ovum will track key 5G market developments including spectrum licenses awards and network deployments, while providing strategic advice to service providers on how to create unique 5G offerings that go beyond what was done for 4G.

Fixed-mobile convergence and bundling

Most European markets are fully converged, but the remaining mobile-only operators in the region are still doing surprisingly well. Ovum will explore this market contradiction and the overall impact of fixed-mobile convergence and bundling on operator KPIs and market performance. Convergence is also accelerating at the technology level and is driving the integration of access networks. Ovum will assess the implications and provide a long-term view of “unified networks” with special attention given to competitive dynamics.

Europe service provider innovation

As the European market becomes increasingly competitive and sophisticated, service providers in the region must develop innovative products and services that will help them to win and retain customers, develop new revenue streams, and differentiate from their rivals.

Ovum will monitor and analyze product and service innovation in Europe, identifying trends, providing case studies of successful innovative services, and making recommendations for service providers.

Europe IoT markets

The IoT is an important growth sector in Europe. Big in subscriptions but still small in revenue terms, IoT will branch out to consumer and business-to-consumer propositions. As the market matures, new players and segments such as MVNO-IoT are emerging and new technologies such as eSIM are increasing competition.

Ovum will cover IoT service providers, network, and service developments in Europe, will compare strategies and results, and will make recommendations to providers.

Europe market dynamics

The European region is highly diverse – from Portugal to Russia – and is populated by hundreds of fixed, mobile, and TV service providers. Ovum’s country, operator, and regional reports and data provide a detailed understanding of local market conditions, which is essential for service providers to thrive in the region.

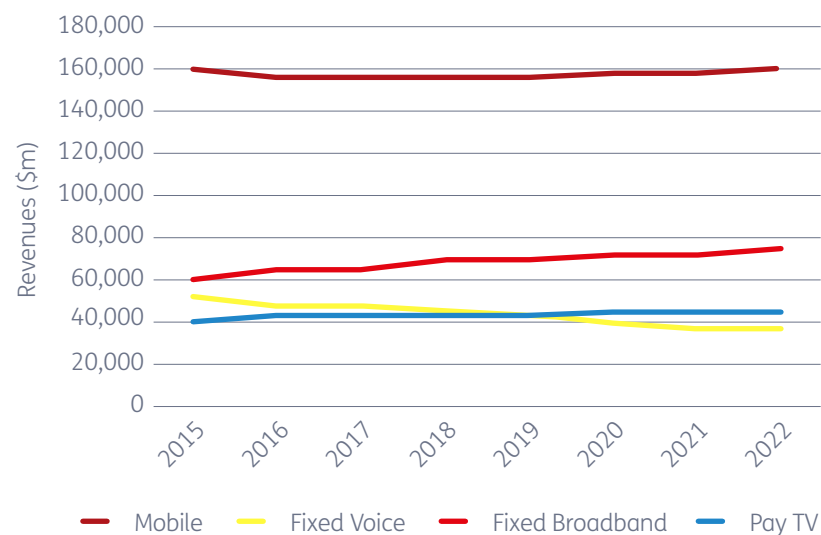
What's new

Improved country reports – country reports have been extended to cover the TV and OTT market, as well as mobile and broadband.

FAANG regional strategy reports – a new series of reports revealing the regional strategies of Facebook, Amazon, Apple, Netflix, and Google, and their impact on service providers and markets in the region.

Consumer Insights regional reports – regional reports based on consumer surveys will provide fresh insights into regional markets.

Europe service revenues by market segment



Mobile data will be the main growth engine in Europe's telecoms and TV markets through 2022 with service revenues increasing at a CAGR of 12% to \$114 billion in 2022.

The fixed broadband market will see more modest growth to reach service revenues of \$74 billion in 2022 representing a CAGR of 2.3%, while pay TV revenues will increase at a CAGR of 1.2% to \$45 billion in 2022.

Overall market growth in Europe across all segments will be muted with service revenues increasing at a CAGR of 0.3% to \$316 billion in 2022.

Middle East and Africa

The Market Challenge

Telecoms markets in the Middle East and Africa (MEA) have become more competitive, complex, and mature. Service providers can no longer rely on past strategies for growth and success. Traditional business lines such as voice calling and SMS are in decline.

However, demand for data is growing strongly, driven by the roll-out of broadband networks, particularly mobile broadband, and the increasing affordability of smartphones. The challenge for service providers is to take advantage of the rising demand for data, and the opportunities that opens up for diversification into new business areas, and for new digital services.

The MEA region is vast and diverse, with substantial political, economic, and infrastructural difficulties. Service providers need a good understanding of local markets in order to succeed.



How Ovum helps you

In-depth reports track and analyze market data, competitive dynamics, and major trends at the country, operator, and regional level, and make recommendations to service providers and other market players.

Case studies, profiles, and topical reports set out to assess significant initiatives and developments in the region, such as digital strategies and services, and the prospects for 5G.

Comprehensive market data and forecasts allow customers to size and compare markets; identify trends, risks, and opportunities; and develop strategies based on statistical evidence.

CONTACT US



Matthew Reed
Practice Leader

“The advanced Gulf markets will be among the first in the world to launch 5G. However, LTE will account for most of the growth in mobile broadband in the Middle East over the coming few years, with the number of LTE connections in the Middle East forecast to rise from 113 million at the end of 2017 to 243 million at the end of 2022.”

Key Deliverables



Regional Outlook Reports – quarterly regional reports providing detailed analysis about market data and developments, with recommendations for major market players.



Country Reports – profiles of the major country markets within the region, including comprehensive data and analysis for the telecom and TV sectors.



Operator Reports – detailed portraits and analysis of the major operating groups within the MEA region, including financial and operational KPIs.



Digital Operator profiles – studies of the digital strategies of major operators in the region.



Case Studies – detailed assessments of specific service deployments in the MEA region.



Regional and Country Datasets – a comprehensive set of data and forecasts for the region and every country within it.

Themes for 2019

MEA service provider digital strategies

MEA service providers are increasingly focusing on digital strategies, including the transformation of their own operations as well as the development of new services. Ovum will profile and assess the digital strategies of major operators across the MEA region and track the development of digital-service sectors such as digital media, e-commerce, and mobile financial services.

MEA 5G service provider strategies, services, and market outlook

Some of the more advanced markets in MEA – particularly those in the Gulf – will be among the first in the world to deploy 5G. Ovum will monitor and analyze 5G strategies in MEA and track the development of 5G in the region as part of our comprehensive coverage of regional broadband markets. While there are a few very advanced telecoms market within MEA, the region as a whole has a substantial broadband deficit, and Ovum's research into broadband markets and strategies will also include efforts to correct that deficit and improve connectivity.

MEA service provider innovation

As the MEA market becomes increasingly competitive and sophisticated, service providers in the region must develop innovative products and services that will help them to win and retain customers, develop new revenue streams, and differentiate from their rivals. Ovum will monitor and analyse product and service innovation in the MEA region, identifying trends and making recommendations for providers.

MEA IoT markets

The IoT is an important growth sector in MEA, with applications including retail, smart metering, traffic management, and agricultural and industrial monitoring and management, as well as a range of use cases in smart city projects that are underway in the Gulf markets and beyond. Ovum will cover IoT network and service developments in MEA, compare strategies and results, and make recommendations for providers.

MEA market dynamics

The MEA market is highly diverse and is made up of more than 70 countries and territories. Ovum's country, operator, and regional reports and data provide a detailed understanding of local market conditions; knowledge that is essential for service providers to thrive.

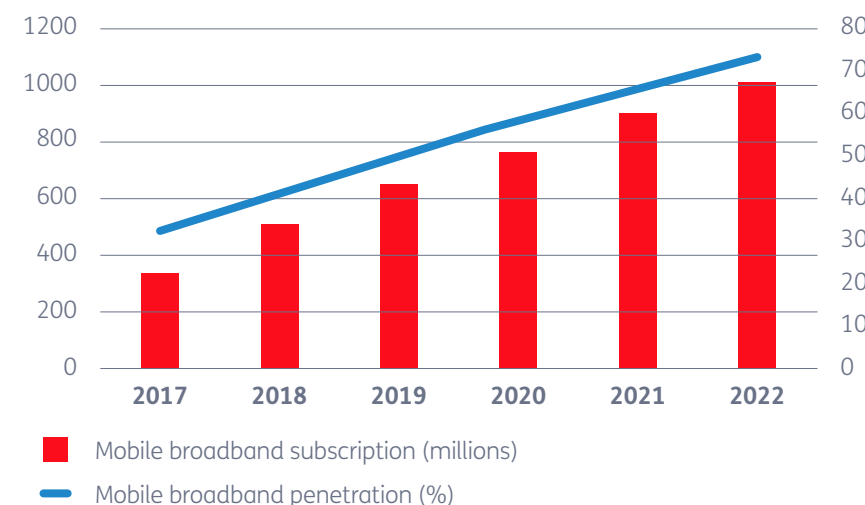
What's new

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FAANG regional strategy reports – a new series of reports revealing the regional strategies of Facebook, Amazon, Apple, Netflix, and Google, and their impact on service providers and markets in the region.

Consumer Insights regional reports – regional reports based on consumer surveys will provide fresh insights into regional markets.

Africa, mobile broadband subscription and penetration forecasts, 2017-22



The number of mobile broadband subscriptions in Africa is set to increase rapidly over the coming few years, rising from 339 million at end-2017 and crossing the one-billion mark in 2022 to reach 1.02 billion at end-2022, according to forecasts by Ovum. Mobile broadband penetration in Africa will rise from 32.4% at end-2017, to 73.5% at end-2022.

Regulation and Policy

The Market Challenge

The evolution of telecoms, media, and technology (TMT) has never been harder to comprehend – let alone regulate.

Tech companies operating “over the top” of the Internet are rapidly challenging traditional business models in ever more dramatic ways, while largely escaping the oversight that blinds their more established service provider and enterprise peers. At the same time, the growing power of the OTT providers is raising questions about what new forms of dominance and anti-competitive behavior will take in the digital economy. There is no doubt that the digital giants – including Facebook, Amazon, Apple, Netflix, and Google (FAANG) – are becoming increasingly controversial, which is forcing technology regulation onto center stage.

The challenge for all stakeholders is to protect competition and consumers, without foreclosing on TMT’s potential to improve lives, economies, and societies.



How Ovum helps you

Where to play – Assess which regulatory issues your organization should prioritize.

What to deliver – Learn how leading regulators are tackling the industry’s latest challenges.

How to sell – Understand how to successfully design and influence regulation and policy.

CONTACT US



Sonia Agnese
Senior Analyst

“5G planning will gain significant momentum with more than 13,000MHz of spectrum already planned to be auctioned in 2019 and 2020. Ovum will track and advise on the largest ever spectrum awards around the world with combinations of licensed spectrum, shared spectrum, and unlicensed spectrum for the development of 5G.”

Key Deliverables



Cutting-edge regulation reports – discover how regulators, service providers, and other stakeholders are tackling 5G, OTT, IoT, data protection, and other emerging regulatory challenges.



Reactive research notes – gain insight into the implications of the most crucial regulatory decisions and developments as they emerge.



Country overviews and assessments – assess spectrum policy, wholesale regulation, universal service, and other key regulatory issues in major economies.



Spectrum and NGA trackers – understand policy and initiatives aimed at facilitating the deployment of next-generation access (NGA) networks.



Wholesale broadband and interconnect benchmarks – compare rates for regulated wholesale broadband access and interconnection rates across over 60 countries worldwide, and over time.

Themes for 2019

Regulating future networks

Fiber-to-the-x, 5G, and the Internet of Things (IoT) will increasingly underpin tomorrow's digital economy. But their high roll-out costs and radical potential also pose fundamental questions on the future of investment and competition. Ovum will identify and analyze best-practice examples of regulation – and self-regulation – which stimulate investment without harming competition; and support new business models while reducing the potential for ill effects. Spectrum policy will continue to be critical.

Getting the balance right on OTT

Innovation in telecoms, media, and technology has never moved faster, thanks to the speed at which services delivered “over the top” (OTT) of the internet can be launched and evolved. Critics claim a lack of regulation gives OTT providers an unfair advantage over traditional counterparts, and is leading to abuses of dominance, privacy, and consumer safety. Ovum will advise on how the industry can work together to protect consumers and safeguard competition, while ensuring new business models and startups can rightfully challenge the status quo.

A decisive year for data protection

2018 was a decisive year on data privacy and data protection after the Cambridge Analytica Facebook scandal and the enforcement of the European Commission's General Data Protection Regulation (GDPR). The follow up of how well – or badly – its implementation and application goes will be a key test for the game-changing regulation, and the idea of data protection in general. Ovum will examine the progress of GDPR and other attempts elsewhere in the world to provide a balanced view of the pros and cons of policy aimed at handing citizens back control of their personal data.

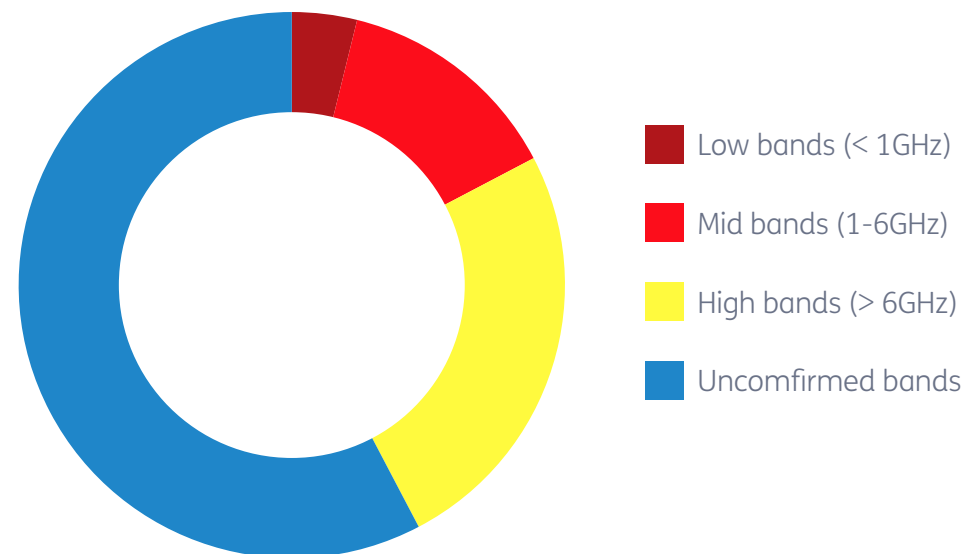
What's new

Enhanced country overviews and assessments – expanded coverage of regulation of OTT services, data protection, and other key emerging topics.

Improved spectrum and NGA trackers – new interactive, visual tools to aid access and analysis of data and developments.

OTT regulatory initiatives tracker – monitoring the development of regulatory initiatives oriented towards a more level playing field, including privacy, data protection, taxation, relevant competition cases, and more.

5G trials and launch announcements per spectrum band



Wholesale

The Market Challenge

Wholesaling of telecoms services is critical to the delivery of increasingly complex retail communications services. No modern communications service provider is able to serve its consumer and enterprise customers without using a range of wholesale connectivity, access, hosting, and other value-added services.

However, the wholesale market is highly competitive and increasingly commoditized. New wholesale competitors are entering the market and new wholesale customer segments are appearing. These customers are demanding greater flexibility, responsiveness, differentiation, and innovation.

Wholesalers must respond to these changes by adapting their strategies, enhancing their service portfolios, and improving their responsiveness to evolving customer demands.



How Ovum helps you

Understand how wholesale markets are changing and discover the best strategies for exploiting new opportunities.

Learn which wholesale strategies, service innovations, and partnerships are succeeding at delivering the greater flexibility and responsiveness that customers demand; and improve wholesale revenues and margins.

Discover how wholesalers are partnering to develop services and solutions that support new retail services and meet evolving demands, such as the Internet of Things, social media, security, and fraud prevention.

CONTACT US



David James
Practice Leader

“Less than half of wholesale customers rate their suppliers’ performance as excellent or good for any quality criteria.”

Key Deliverables



Wholesale innovation analyzer – discover which innovations carriers are bringing to market and Ovum's assessment of their likelihood of success.



European wholesale market share report – learn how the revenues of leading wholesalers in Europe are changing, and how their shares of this mature market are evolving.

Themes for 2019

Strategies for effective transitions in wholesale

A number of major telecoms industry transitions are impacting wholesale service providers, including the evolution of TDM voice into voice and video over IP, the growth of next generation P2P and A2P messaging services, the rise of network virtualization, the retirement of time-expired communications services, and innovative new pricing models. We plan to analyze the likely impact of these transitions on wholesalers and advise on strategies to mitigate their adverse impacts and maximize the associated benefits.

Developments in wholesale hubbing services

During 2019 we plan to revisit and extend our coverage of hubbing services that enable the reliable, secure, and efficient interconnection of multiple implementations of retail communications services, such as IP voice, cloud, IoT, RCS messaging, and SD-WAN services. The research will encompass the pricing, billing, and settlement of charges for hubbing services. We plan to compare and contrast the prospects for different wholesale hubbing services and will make recommendations for their implementation and costing, maximizing the return from each group.

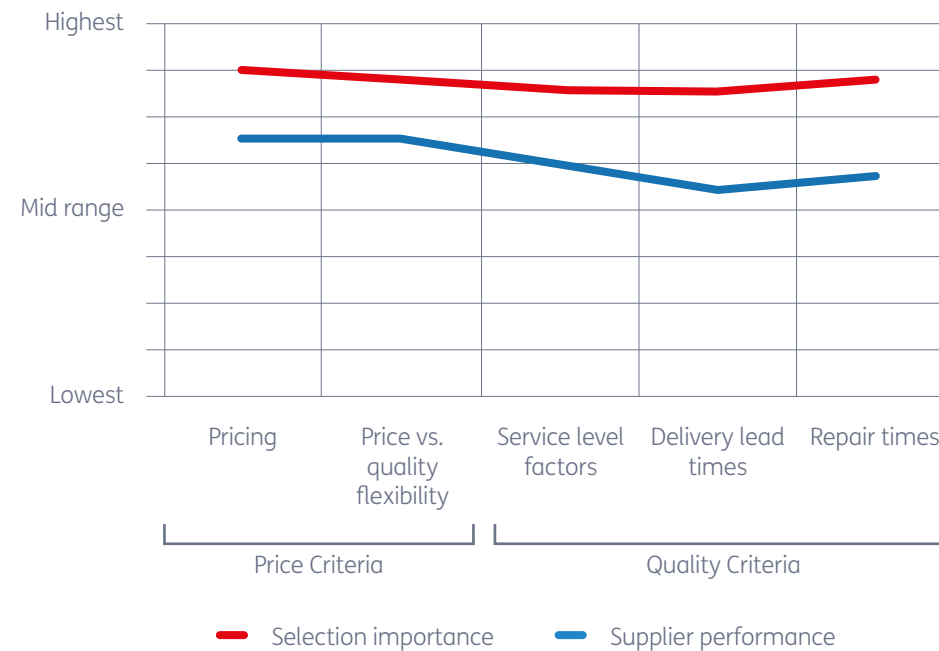
Developments in neutral infrastructure

The number and variety of players offering carrier-neutral fixed and mobile access and backbone networks, data centers, and cell towers is growing. We are planning research to identify the strengths and weaknesses of different carrier-neutral strategies and implementations, and will analyze their impact on the markets where they operate.

What's new

Wholesale announcements tracker – details and analyzes major wholesale product launches, enhancements, infrastructure upgrades, and other market developments during the year.

Substantial gaps exist between wholesale customer expectations and their experience of price and quality



Get in Touch

Want to learn more?

[Click here](#) to request a callback.

