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SEARCH

ANALYSIS

# Service Provider Markets

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**Mike Roberts**

**Research Director**

Service Provider Strategies & Markets

“ “ Service providers have to innovate like never before to survive and thrive the digital transformation of their markets ” ”



## The Market Challenge

Service providers worldwide are at a strategic crossroads as they balance the need to defend and innovate around their traditional consumer and enterprise connectivity businesses driving the bulk of their revenues while investing in new digital services such as 5G and IoT.

Transformation is high on the agenda as service providers drive innovation and cost reduction in traditional segments such as mobile, broadband and pay TV with new digital tools such as virtualization, digital customer service and artificial intelligence.

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



**Mike Roberts**  
Research Director, Service  
Provider Strategies & Markets

## How Ovum helps you

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

**Learn** how leading service providers are investing in new digital tools such as artificial intelligence and expanding into new digital segments such as 5G and IoT.

**Innovate** around existing mobile, broadband and entertainment services based on the best practices of leading service providers worldwide.

## Key Deliverables

**Digital Strategies** – learn from the digital strategies and challenges of leading service providers globally through operator case studies and global analysis

**Service Provider Benchmarking** – assess service provider best practice through regular company updates and benchmarking of the world's top service providers

**Telco Services Innovation Radar** – gauge how service providers are innovating by segment and region with a detailed innovation tracker, case studies and analysis

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Global Digital  
Enablement  
Revenues in the  
TMT industries will  
top \$4.7 Trillion in  
2022

”

**Mobile, Broadband and Pay TV Integrated Forecasts** – understand the growth and convergence of the industry’s key segments with detailed forecasts on the industry’s core services by region and major country worldwide

**Mobile Subscription and Revenue Forecasts** – gain insight into the state of the mobile market by region and major country 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 2018

### Digital service provider strategies and outlook

Service providers are transforming their strategies to address fast-changing markets and intense competition from ascendant digital players. Assess how digital markets across the telecoms, media and technology landscape will unfold and what it means for today’s service providers and their strategies, operations and services.

### Broadband everywhere: the road to 5G & the Internet of Everyone

Broadband is the future of the communications industry and 5G is the future of broadband. Ovum will assess the impact of 5G on service provider strategy and performance as it accelerates virtualization, opens new revenue opportunities and upends traditional broadband value chains. Ovum will also research the Internet of Everyone – including the efforts of digital giants such as Google and Facebook to bring the Internet to the “last four billion,” and the implications for service providers and the Internet itself.

### Mobile, broadband and pay TV market outlooks

Mobile, broadband and pay TV markets are maturing and under attack from digital players but still drive the lion’s share of subscriptions, revenues and margins for communications services providers. Track the size, growth and outlook of the industry’s core services through regular in-depth subscription and revenues forecasts and analysis by market segment, region and major country.

### Service provider innovation

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 digital giants, traditional telcos or disruptive startups through detailed market tracking and innovation case studies.

### Service provider strategy and performance benchmarking

Service providers globally are developing new strategies and services to address fast-changing markets. Learn which service providers are succeeding and which are struggling through in-depth data and analysis on service provider performance delivered through regular company updates and financial benchmarks.

## What's new

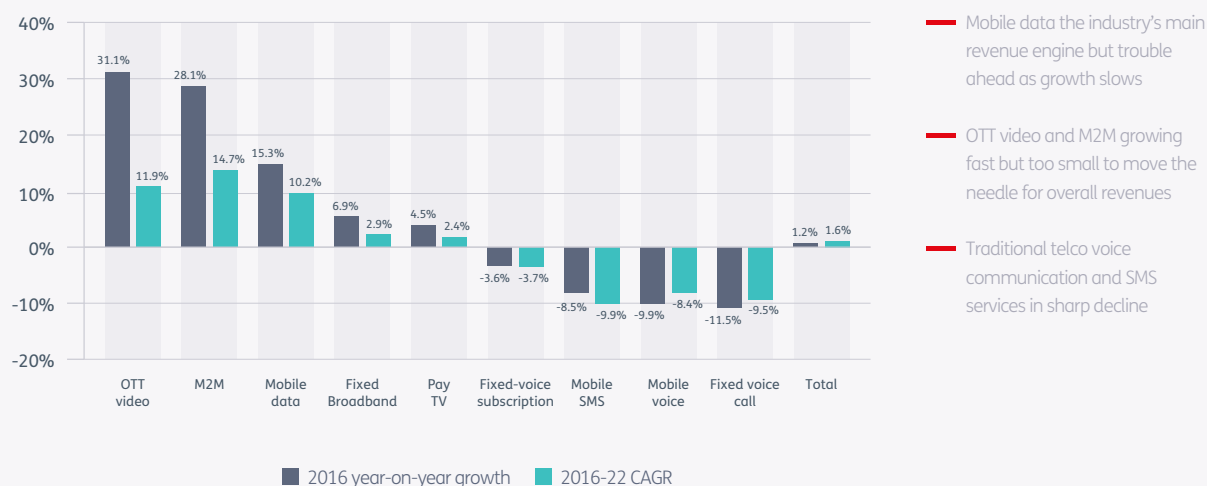
**Global Digital Market Outlook** – understand digital markets globally and their impact on digital and communications service providers

**Digital Service Provider Index** – assess the digital transformation and performance of leading service providers worldwide

**5G Outlook** – evaluate the impact 5G will have on service provider strategies, operations and services with market analysis and forecasts

**Internet of Everyone** – gauge how initiatives by Facebook, Google and others to connect billions worldwide who still lack Internet access could transform the TMT industry and the Internet itself

### Mobile data driving telecoms & media service revenues to 2022



## The Market Challenge

American operators are pressing ahead with strategies to transform their businesses. In the United States, this means doubling the bet on new markets, such as the Internet of Things (IoT), in which new LPWA networks will test the providers' ability to tap into new revenue streams. The accelerated pace of change will also see operators trying to intensify monetization opportunities from bundling content with telecoms services, which will ensure that securing access to premium content remains as important as ever.

Latin American operators are a step behind, but are showing signs of recovering from the economic downturn of the past two years. In the main markets, the focus has shifted to protecting profitability rather than growing market share, and the priority is to grow the postpaid customer base and expand LTE coverage while keeping within lower investment budgets. Across the region most operators still lack a clearly articulated IoT strategy.



**Ari Lopes**  
Principal Analyst

## How Ovum helps you

**Regional** outlook reports analyse 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 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 markets and trends.

## 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 portrait and analysis of the major operating groups within the Americas, including financial and operational KPIs

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Ovum forecasts that by 2022 the us will have 103.7 Million mobile 5g subscriptions, the second-largest number after China  
”

**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 the region

## Themes for 2018

### Americas service provider digital strategies

As the Americas market matures, operators are moving ahead with strategies to transform their businesses. As a consequence, there is pressure for consolidation and M&A activity has accelerated. The bigger players are seeking a differentiation strategy by delivering premium content through super-fast networks where they can assure a premium experience. Nonetheless, lessons learned from OTTs will see operators complementing this strategy by launching their own video OTTs, targeting the full spectrum of customer segments. Ovum will assess how successful such strategies can be.

### Broadband everywhere in the Americas – the road to 5G

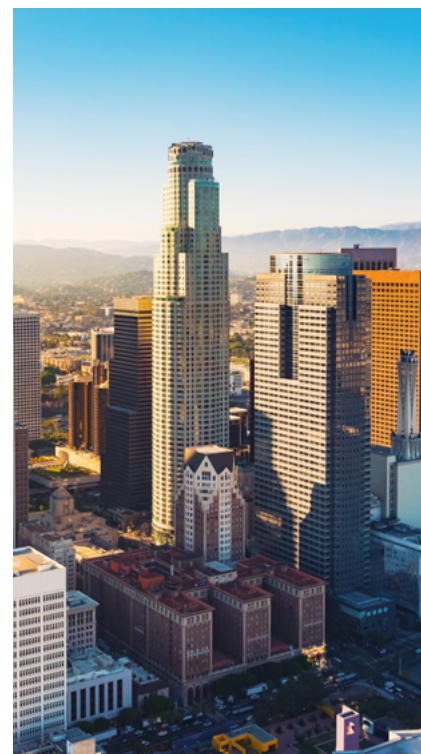
The US will lead the global adoption of 5G while the rapid adoption of mobile broadband in Latin America continues apace. Ovum will track the move to 5G in the Americas by analysing market data, operators' 5G strategies, and regulatory developments. In addition the accelerating take-up of 4G represents one of the main growth opportunities in Latin America, driving fundamental changes in the market. Fixed broadband has also been posting strong growth. Ovum will assess the role that small and regional providers are playing in the expansion of fixed broadband outside the big urban areas, as well as the further development of mobile broadband, including the adoption of LTE-A, the deployment of LTE in the 700MHz spectrum bands and the emergence of 5G.

### Americas service provider innovation

Market saturation means that traditional business will not deliver the results shareholders expect, while additional pressure is coming from traditional as well as new competitors. Service providers need to invest in innovation not only in order to survive, but to thrive. Ovum will monitor and analyse product launches, new services and new technologies in the Americas, providing recommendations to regional players.

### Americas IoT markets

Interest and investment in IoT in the Americas is accelerating, and





Ovum will report closely on the progress of IoT in the region, as service providers deploy IoT technologies and services. Ovum's analysis will compare IoT developments and prospects within the region, point to the markets and sectors that offer the best prospects, and make recommendations about provider IoT strategies.

### Latin America after the economic downturn

Latin America is slowly recovering from the economic downturn, and service providers have to adapt to this new reality. M&A activity in important markets in the region, such as Argentina, Brazil, and Colombia, might lead to a reconfiguration of the competitive landscape. Additionally, regulatory pressure might lead to important shifts in Mexico. Ovum's research will investigate these developments and analyse the potential impact.

## What's New

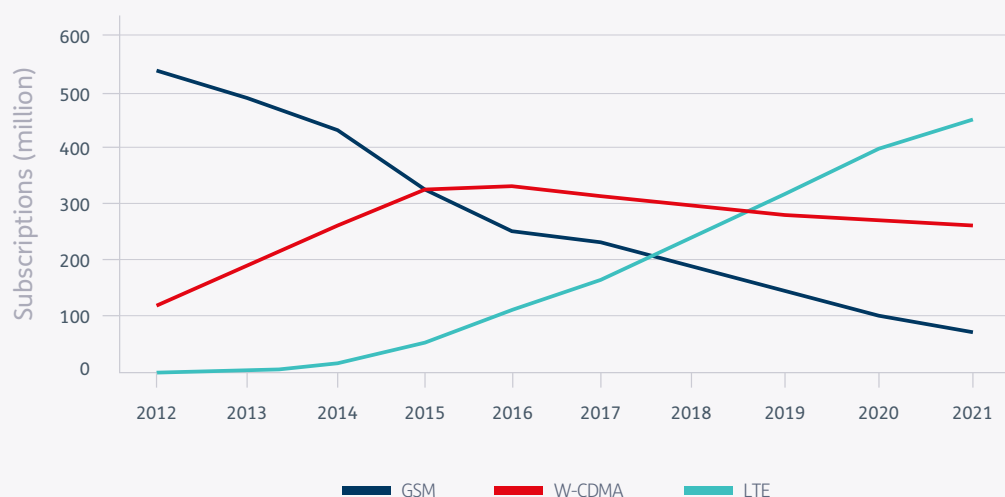
**Expanded country reports** – country reports will be extended to cover the TV market as well as fixed and mobile telecoms

**Consumer Insights surveys** – new consumer survey program will give fresh insight into regional markets

**Operator reports to cover enterprise** – operator reports will be expanded to cover enterprise as well as consumer markets

**Digital Index tracker** – new dataset will cover service providers' digital services and performance

Latin America, mobile subscriptions per technology, 2014-21 (million)



*In 2015 and 2016, Latin America saw an unprecedented decline in mobile connections. However, the decline was mainly in 2G connections, while LTE is by contrast experiencing extraordinary growth. Ovum forecasts that LTE subscriptions in Latin America will increase at a CAGR of 30% between 2016 and 2021. LTE now accounts for 24% of mobile connections in Latin America and is expected to account for 58% by 2021.*

## The Market Challenge

Operators in Asia face the combined challenge of slowing or stagnant subscription growth, continued core product commoditization and intensifying competition from both traditional and next-generation players.

In the new, digital environment, consumers are freely accessing content and services from a seemingly infinite number of companies, many of which are dominating traditionally telco-related areas like messaging. The proliferation of platforms and devices also complicates operators' understanding of customer usage habits and digital consumption trends. Nevertheless, operators are making their own forays into digital sectors including messaging, video, gaming, and music.

In enterprise markets, service providers must consider how to best position themselves if they are to capture the opportunities for telcos that are emerging across various verticals.



**David Kennedy**  
Practice Leader

## How Ovum helps you

**In-depth** reports track and analyse 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 study** profiles and topical reports set out and assess significant initiatives, developments and strategies in the region, such as digital-service deployments, and the prospects for 5G.

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

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By the end of 2022, Asia will have 191.8 Million 5g subscriptions, more than any other region

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## Key Deliverables

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**Case Studies** – detailed assessments of specific service deployments in the Asia

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

## Themes for 2018

### 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, M2M, and FMC services. Ovum's data and reports cover market segmentation, pricing and packaging, marketing campaigns, CRM, and retail strategies.

### Broadband everywhere in the Asias – the road to 5G

Asia is expected to rapidly become the largest regional market in the world for 5G, once China's deployment of 5G gets underway. Ovum will track the move to 5G in Asia by analysing market data, operators' 5G strategies, and regulatory developments. In addition topics such as next-generation LTE, new M2M and IoT networks, fiber for ultra-broadband deployment, and network strategies for rural and remote areas must be addressed. Ovum's Asia channel will address these topics through comprehensive analysis and case studies.

### 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 analyse product and service innovation in Asia, identifying trends and making recommendations to providers.

### Asia IoT markets

Ovum will report closely on the progress of IoT in Asian markets, as operators deploy IoT technologies and services. Ovum's analysis will compare IoT developments and prospects within the region, point to the markets and sectors that offer the best prospects, and make recommendations about provider IoT strategies.



## China is 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 analyse the complexities of this huge and influential regional market.

## What's New

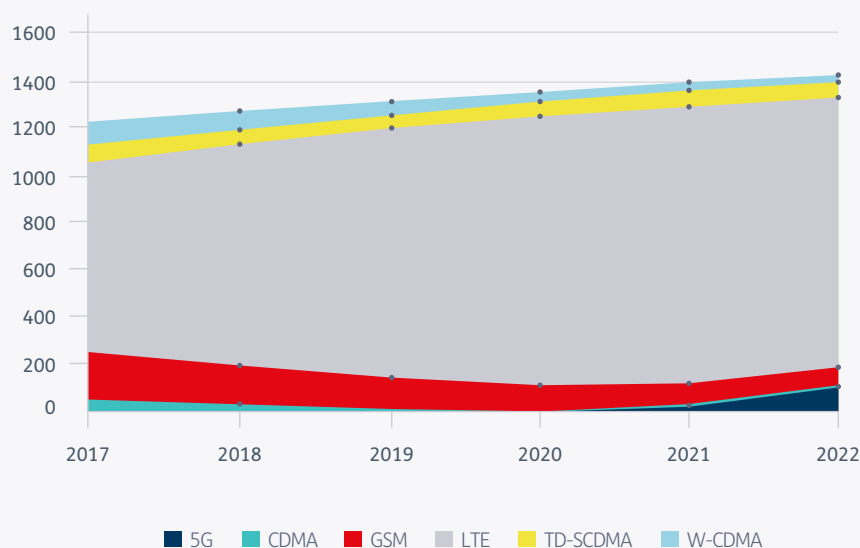
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China, mobile subscription forecasts by technology, 2017-22 (millions)



China is the biggest mobile market in the world, and is still growing, with the number of mobile subscriptions forecasted to increase from 1.41 billion at end-2017, to 1.64 billion at end-2022. China will also be the single biggest market in the world for 5G by the end of 2022, when it is expected to have 128.75 million 5G subscriptions.



## The Market Challenge

Europe is at an inflexion point. The years of sharp decline are over, but the regional market is largely stagnant and service providers need to improve their performances to match the healthier macroeconomic situation across much of Europe.

However, competition remains fierce, and the acquisition and retention of market share remains high on the agenda. Service providers need to work harder on a number of fronts: Both fixed and mobile offerings are largely undifferentiated, and pricing pressure spreads too easily across national markets. Innovation in services and experiences, as well as the effective segmentation of the customer base – mass personalization – will help service providers to extract more value. Meanwhile, low-margin customers and services are a burden in markets that are growing sluggishly. A radical review of business processes and structures is an imperative while legacy support systems and network can be refreshed with newer cost-effective, digital-first technologies.

The monetization of mobile video, TV, and to a lesser extent the connected home, all represent new and important markets for service providers. The adjacent markets of advertising and third-party service monetization also offer important opportunities.

## How Ovum helps you

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

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

## Key Deliverables

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



**Dario Talmesio**  
Practice Leader



The European region is at an inflection point as 2017 gives encouraging signals. The pace of decline for fixed and mobile revenue slowed in 2016, to 2.75% Year on year, but capex intensity remains high at 17.8%



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

**Operator Reports** – detailed portrait and analysis of the major operating groups within Europe, including financial and operational KPIs

**Case Studies** – detailed assessments of specific service deployments in Europe

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## Themes for 2018

### European service provider digital strategies

As the European market is highly mature, service providers and others in the industry are increasingly looking to develop new, digital strategies centred on digital transformation as well as on digital services. Ovum will assess digital strategies and services in the region across sectors such as digital media, e-commerce, TV, IoT, and mobile financial services, through case studies, analysis, and data.

### Broadband everywhere in the Europe – the road to 5G

As video becomes the most important data traffic-driver, service providers are exploring new data monetization mechanisms with today's networks while also evaluating the business case for 5G. Although customer propositions must appear simple, video monetization strategies build on an incredibly complex construct where multiple – and often competing – partners design their offerings in compliance with net neutrality and customer data protection regulations. How will the economics of content, economics of broadband and economics of advertising be reconciled with video-bingeing strategies and promotions? Ovum will also monitor service provider progress and best practice across the region.

### European service provider innovation

The European 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 analyse product and service innovation in Europe, identifying trends and making recommendations to providers.

### European IoT markets

IoT is already widely deployed in Europe and Ovum will report closely on the progress of IoT in the region, as operators introduce new



IoT technologies and services. Ovum's analysis will compare IoT developments and prospects within the region, point to the markets and sectors that offer the best prospects, and make recommendations about provider IoT strategies.

### Consolidation in Europe continues, but has it worked so far?

The European region has witnessed a wave of consolidation in the TMT sector, with intense M&A activity in recent years. While mobile consolidation opportunities in the mobile sector have diminished, there is scope for wider consolidation across the broader TMT market, perhaps around triple-play (fixed-mobile-tv) combinations, as well as within the highly-fragmented eastern European fixed sector. Ovum will constantly monitor M&A activities and assess the results of consolidation in markets where it has occurred in the recent past.

## What's new

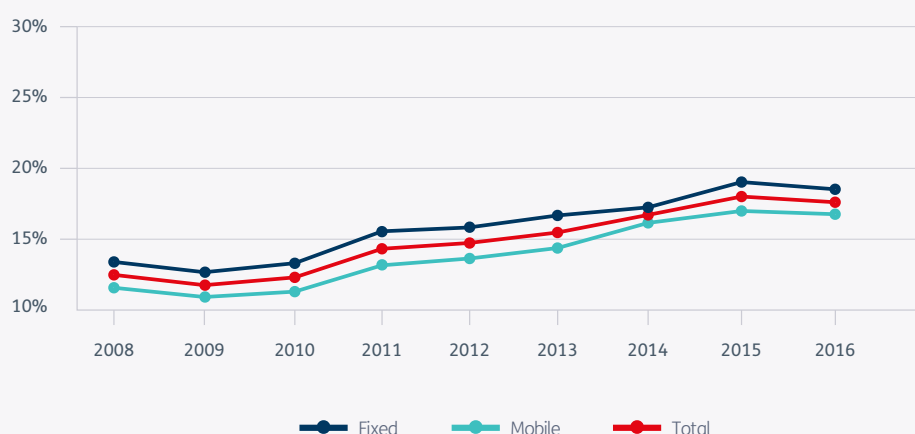
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Telecom Capital Intensity – Western Europe



Despite revenue stagnation, European operators are still committed to the robustness of their networks, as they face increased demand for video services.

Doing more for less means that capex intensity has increased in recent years, rising in five of the seven years since the 2008 financial crisis.

With 5G spectrum auctions and network deployments approaching, European operators need to work hard to improve their top-line and bottom-line financials.

## The Market Challenge

The high rates of growth, particularly in mobile subscription numbers, that used to characterize MEA telecoms markets have fallen significantly. As in other regions, the established business lines of voice and SMS are in decline at most telecoms operators.

Data access and data revenues are growing strongly, but the growth is from a low base in many cases, and providing data connectivity requires substantial investment. Some markets in the region are leaders in mobile financial services, particularly mobile-money transfer, but the development of other new digital services in the region is in its infancy.

Political, economic and infrastructure difficulties affect substantial parts of the region. Additional complexity comes from the vast and varied nature of the MEA region. Some countries in the Middle East have very advanced telecoms markets, whilst sub-Saharan Africa, by contrast, has some of the world's least-developed markets.

## How Ovum helps you

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

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



**Matthew Reed**  
Practice Leader

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Ovum forecasts that the first 5G services in the Middle East will be launched in 2020, and that there will be 2.3 million 5G subscriptions in the Middle East by end-2022

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**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 the region

## Themes for 2018

### MEA service provider digital strategies

Service providers and others in the MEA market are increasingly looking to develop new, digital strategies centred on digital transformation as well as on digital services. There is growing interest from beyond the region too: In 2017, Amazon acquired the Middle East e-commerce site Souq.com as a bridge into the region. Ovum will assess digital strategies and services in the region across sectors such as digital media, e-commerce, and mobile financial services, through case studies, analysis, and market data.

### Broadband everywhere in MEA – the road to 5G

There are a few very advanced telecoms markets within MEA, but the region as a whole has a substantial broadband deficit, and addressing that shortfall remains a major issue. Ovum's data and analysis will cover the prospects for and progress of broadband in the region, as operators continue to roll-out 3G and 4G networks and services, and deploy more fibre for backhaul and access. Ovum will also track the move to 5G in MEA by analysing market data, operators' 5G strategies, and relevant regulatory developments. Some of the advanced Gulf markets – notably the UAE and Qatar – are expected to launch 5G early. But for much of the rest of the MEA region, 5G will come some time later. However, in many markets in the region the planning and preparation for 5G should start now.

### MEA service provider innovation

The MEA 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. Specific strategies are required for the region's overwhelmingly prepaid mobile markets. MVNOs and operator sub-brands are relatively new to the region but offer a means of increasing market segmentation. Ovum will monitor and analyse product and service innovation in the MEA region, identifying trends and making recommendations to providers.

### MEA IoT markets

There is a lot of interest in IoT in the Middle East and Africa, and Ovum



will report closely on the progress of IoT in the region, as operators deploy IoT technologies and services. Ovum's analysis will compare IoT developments and prospects within the region, point to the markets and sectors that offer the best prospects, and make recommendations about provider IoT strategies.

### MEA service providers reshape strategies for new markets

As the MEA market matures and moves beyond the high-growth phase of a few years ago, service providers and other key players need to reinvent themselves for the next stage of the development. At the same time, difficulties such as the impact of the lower price of oil and other commodities on resource-dependent economies, as well as political instability within the region, are forcing change. Ovum will track and analyse the changing market environment, and the strategies for succeeding amid the upheaval.

## What's new

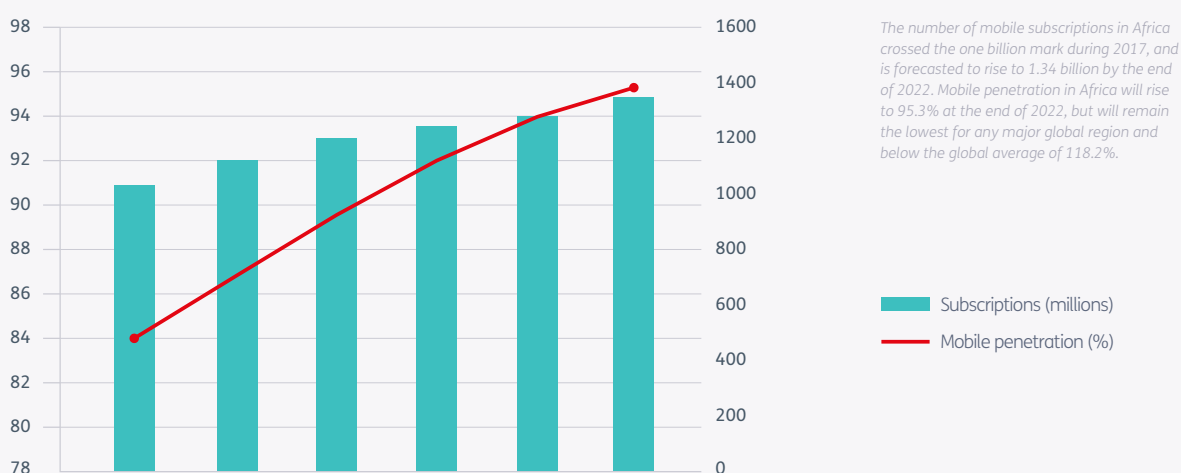
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Africa, mobile subscription and penetration forecasts, 2017-22



## The Market Challenge

Wholesalers operate in an increasingly complex and competitive market, in which their customers are demanding greater flexibility, responsiveness, differentiation, and innovation. In response, many players in the market are developing strategies to defend against the threats posed by OTT service providers and intense price pressure, and to attract business from new customer segments.

The successful wholesalers of the future will be those that respond to the commoditization of traditional wholesale services by differentiating and adding value to their services portfolios. Even the most traditional wholesaler must take a more proactive approach to meeting customer needs, especially when targeting new customer segments.



**David James**  
Practice Leader

## How Ovum helps you

**Understand** where wholesale markets are growing and discover the best strategies for maximizing those opportunities.

**Discover** how to create innovative strategies, services, and solutions to deliver greater flexibility and responsiveness to customer demands.

**Learn** which service portfolios, pricing models and customer service strategies are most effective at differentiating from competitors and capturing business from a range of wholesale customer segments.

## Key Deliverables

**Wholesale innovation analyser** – understand what innovations carriers are bringing to market and their likelihood of success

**European wholesale market share report** – discover which wholesalers are growing their shares of this well-developed market

**Wholesale customer survey** – benefit from our analysis of the evolving demands of wholesale customers

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Wholesale revenues will reach \$213bn by 2021 as proactive carriers respond to customer demands for innovative and flexible new solutions

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## Themes for 2018

### 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 rise of network virtualization, the retirement of time-expired communications services, and innovative new pricing models. We will

analyse the likely impact of these transitions on wholesalers, and advise on strategies to mitigate their adverse impacts and maximize the associated benefits.

### Managing evolving wholesale service portfolios

Our forecasts demonstrate that wholesale revenues will grow as a result of increases in global trade, in broadband penetration, and in telecoms' dependency on wholesale services. However, not all services are expected to experience improving revenues or margins. During 2018 we will compare and contrast the prospects for different groups of wholesale services, and will make recommendations for maximising the return from each group.

### The impact of consolidation on the wholesale market

There has been a recent flurry of mergers and acquisitions among Communications Service Providers (CSPs), particularly in the mature markets of North America and Europe. Some consolidation is intended to grow market share, some to gain access to complimentary capabilities, or to reach additional markets. We plan to research the impact that each type of consolidation will have on the overall wholesale market and on the players directly concerned. We will advise wholesalers how to take advantage of the opportunities presented by market consolidation.

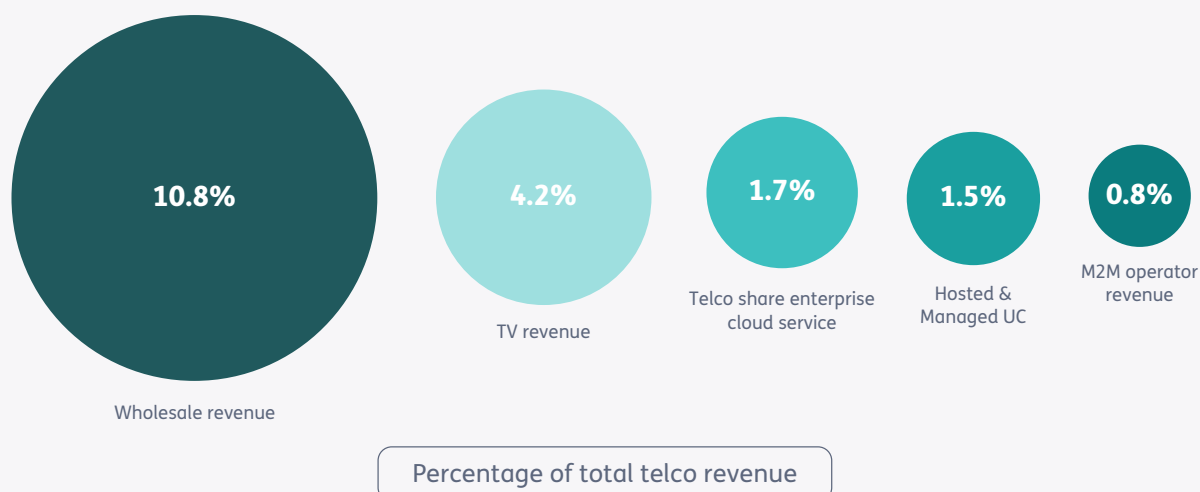


## What's new

**Wholesale announcements tracker** – reports and analyses major wholesale product launches, enhancements, infrastructure upgrades, and other market developments during the year

### Wholesale accounts for over 10% of telco revenue

Telcos are forecast to earn more from wholesaling services in 2021 than from TV, M2M, enterprise cloud and hosted and managed unified communications combined.





## 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 binds their established service provider and enterprise peers. At the same time, the growing power of the OTT providers is raising questions about what new forms dominance and anti-competitive behaviour will take in the digital economy.

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



**David Kennedy**  
Practice Leader

## How Ovum helps you

**Assess** which regulatory issues your organization should prioritize.

**Learn** how leading regulators are tackling the industry’s latest challenges.

**Understand** how to successfully design and influence regulation and policy.

## Key Deliverables

**Cutting-edge regulation reports** – discover how regulators, service providers and other stakeholders are tackling 5G, 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 scorecards** – 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.

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5G planning will gain significant momentum in 2018 as regulators move to auction 4,000mhz of spectrum, boosting the total amount awarded by 200% to 6,000mhz

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

## Themes for 2018

### 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 questions fundamental to the future of investment and competition. Ovum will identify and analyse best-practice examples of regulation – and self-regulation – that stimulate investment without harming competition and support new business models while reducing the potential for ill effects.

### Getting the balance right on OTT

Innovation in the 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 competition, while ensuring new business models and startups can rightfully challenge status quos.

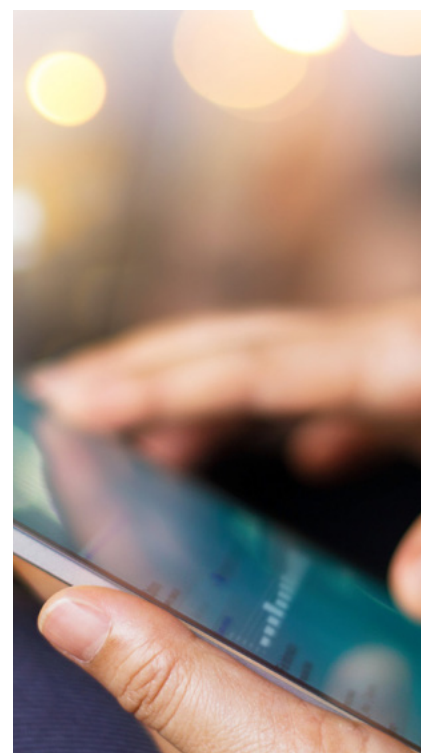
### A decisive year for data protection

The European Commission's General Data Protection Regulation (GDPR) will become enforceable in May 2018. 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 over their personal data.

## What's new

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

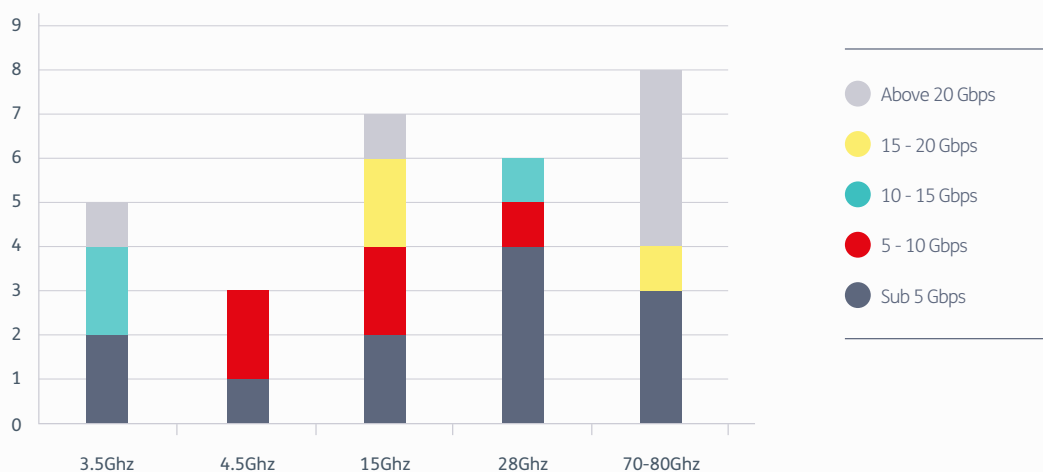
**Improved spectrum and NGA trackers** – new interactive, visual tools to aid access and analysis of data and developments.



**New data protection tracker** – monitoring the development, implementation, application of data protection regulation, including GDPR and more.

## Higher spectrum bands have supported 5G broadband speeds as fast as an eye-watering 35Gbps

Speeds achieved by spectrum band in global 5G trials





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