

# 5G

## ACCELERATOR

5G Accelerator draws together Ovum's 5G market analysis and data into a single subscription service. With ongoing updates from across our telecoms, media, and technology research services and direct support from our team of expert analysts, this service provides all the market intelligence you need to capitalize on the 5G opportunity.



**DARIO TALMESIO**

**Principal Analyst and  
Practice Leader**  
*Service Provider Markets*

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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 research agenda in 2019.

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## 5G PROMISES TO TRANSFORM THE TECHNOLOGY AND COMMUNICATIONS LANDSCAPE

While 5G will initially be evolutionary, it will go on to deliver a host of new capabilities and services ranging from artificial intelligence and augmented reality to the Internet of Things. It requires the adoption of new approaches and technology, and for players from across the TMT landscape, the imperative is to develop new strategies to exploit the opportunities 5G brings.

**For operators** 5G rollout will offer a rare opportunity to reshape market share, especially for challengers. It has the potential to spark a new round of M&A and facilitate the entrance of new players into the connectivity market – and we wait to see the roles that Google, Apple, Facebook, and Amazon will seek to play.

**Vendors** need to balance encouraging 5G investments with not killing off the current market for LTE network solutions. Crucial to success is creating realistic 5G roadmaps and helping operators set their strategies accordingly, while selecting the most appropriate 5G and complementary technologies.

**Operators, media companies, and internet platforms targeting the digital consumer** will need to determine how they can seize 5G to fundamentally reinvent the roles they play in consumers' lives. A key element will be understanding the new devices, applications, and business models that 5G will enable, and when and where.

**For operators offering 5G enterprise services**, the challenge will be persuading enterprises to favor 5G services over other connectivity options. Innovative AI applications that depend on 5G are just beginning to emerge, from autonomous vehicles to automation in next-generation factories, augmented reality in healthcare delivery or field service scenarios, to drones for security or agricultural monitoring. It should soon be clear which services will be commercially viable.

**Ovum's analyst teams are exploring the impact of 5G from each of these perspectives. Wherever you play, our 2019 research agenda will arm you with a comprehensive set of data and research deliverables to help you make the critical decisions necessary to succeed with 5G.**

# 5G ACCELERATOR RESEARCH THEMES FOR 2019

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## **The operator challenge: monetizing 5G**

For operators, monetizing 5G will be the most challenging task. Essential to success will be deploying the network in a cost-effective way, and of course creating a compelling 5G proposition for paying customers – for consumer, enterprise and industrial applications. Ovum will analyze emerging 5G business models and provide insight into early launches and any new 5G use cases.

## **Vendors must help make early 5G investments a success**

Vendors need to position early 5G networks to help their operator partners maximize their initial investments, allowing both parties to gain or defend market share. Key will be helping them select the 5G technologies that will have the greatest market impact. Ovum will explore vendor roadmaps and weigh the potential for a range of complementary technologies.

## **The impact of 5G on the wider digital consumer landscape**

As 5G arrives, it will further open up opportunities for operators, including mobile video, OTT partnerships, e-sports, and super-aggregation. Ovum will assess the potential of 5G technologies and services to drive new and existing media and entertainment opportunities, and also their challenges.

## **Who will benefit from the enterprise market for 5G?**

As B2B use cases emerge, will cloud providers, telcos, SaaS vendors or others profit most when businesses start to access critical services over 5G? Have the network vendors, done enough to justify investment based on business applications, and are telcos aware of where to place their 5G bets? What will be the impact of 5G on the IoT? Ovum will address these questions undertaking research with vendors, operators, and enterprises.

## **Understanding the 5G device ecosystem**

5G is a major opportunity to bring connectivity back to the forefront of consumers' minds. The way devices will be designed and marketed will have a fundamental impact on consumer adoption of 5G services. As 2019 brings the first products to market, Ovum will take a close look at the value proposition and the corresponding market response.

## **Preparing for the longer-term impact of 5G**

5G's impact in 2019 will necessarily be limited by the small number of launches. But all TMT stakeholders should start planning now for the pivot point when subscriber numbers reach critical mass. Ovum will look beyond the impact of the initial phase of improved mobile and fixed broadband services, to when 5G drives network and service transformation and creates significant new market opportunities and disruption.



# REGIONAL 5G OPERATOR STRATEGY, SERVICES AND MARKET OUTLOOK

With in-market experts located in Asia, Europe, MEA and the Americas, Ovum is uniquely placed to deliver an assessment of regional readiness and outlook for 5G. Our regional analysis is founded on proprietary data and forecasts for 227 country markets.

## Americas

The US is set to be a global leader in 5G. Starting with 5G services for fixed and mobile broadband, operators 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. Ovum will track 5G strategies, launches, and services.

## Asia

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).

## Europe

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 the awarding of spectrum licenses and network deployments, while advising operators on how to create unique 5G offerings.

## MEA

Some of the most 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.

# 5G ACCELERATOR: RESEARCH DELIVERABLES

The 5G Accelerator portfolio is a select curation of research deliverables from across our services. With ongoing updates and direct support from our team of expert analysts, it is designed to evolve with your 5G intelligence needs.



### Strategic Reports

Addressing the evolving market dynamics and impact of 5G including regional outlooks, consumer, enterprise and IoT business cases, the media and entertainment 5G ecosystem, 5G and edge computing, spectrum requirements, and rollout plans.



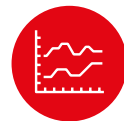
### Case Studies

Detailed 5G pricing case studies and examples of consumer and enterprise service provider 5G innovation.



### Technology Overviews & Roadmaps

Assessments of the developmental progress of the different technologies that make up 5G, such as new radio, new core network, and network virtualization.



### Five-year Forecasts

Five-year forecasts for 5G connections for 227 country markets, and for network elements related to 5G such as RAN.



### Market Trackers

Monitoring 5G spectrum, 5G service providers, 5G consumer tariffs, 5G + OTT app partnerships, and 5G devices and ecosystems.



### Analyst Support

Gain direct access to Ovum's global analyst team. Our team is already advising many leading vendors and service providers on the impact of 5G.

## SIGNATURE RESEARCH

### 5G Impact and Opportunities: Ovum explores the changes, winners, and losers resulting from the worldwide rollout of 5G

This core strategic report, unique to Ovum's 5G Accelerator service, provides an overview of the 5G landscape from the viewpoint of key stakeholders, including vendors, service providers, enterprises and those engaged in IoT.

Key modules will be updated as the 5G rollout gains pace.

# HOW WE HELP

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

We address the strategic, competitive, technology, regulatory and customer challenges and opportunities posed by 5G, supporting players as they decide **where to play**, **what to deliver**, and **how to sell**. 5G Accelerator focuses on:

## For service providers:

- Which use cases in which markets offer the greatest potential?
- Which strategies and business models will be most lucrative in monetizing 5G?
- What are the best timings and strategies for roll out and launch?
- How can 5G transform competitive positioning?

## For technology vendors:

- What are the strategies being developed by service providers for core 5G use cases?
- How is the technology landscape evolving and which solutions are gaining traction?
- What are the key messages that will resonate with service providers?
- What are the 5G launch timings and what spectrum are operators using?

## For media organizations, internet players and enterprise CTOs:

- How rapidly will 5G roll out in each market and what will be its rate of adoption?
- Which industries will benefit the most and what will be the decisive use cases?
- Which service providers offer the greatest potential for partnerships?
- When will the 5G pivot point arrive?

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## WHY OVUM



### EXPERIENCE

We have been guiding leading TMT organizations to growth for more than 30 years



### CAPABILITY

Our analysis is founded on a proprietary and market-leading set of data, forecasts, and tools



### APPROACH

We offer perspectives across converging markets, with a focus on the impact of transformative technologies



## DARYL SCHOLAR

**Practice Leader**  
Next Generation  
Infrastructure

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For vendors, early 5G success will lay the foundation for the next decade in the mobile infrastructure market. Success now will be needed for success later. ”



## CONTACT US



To learn more about 5G Accelerator – visit

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## ABOUT OVUM



We provide authoritative data & forecasts, market research and analysis, bespoke consulting and end-to-end marketing services to help companies thrive in the connected digital economy.

Ovum helps service providers and their technology partners create business advantage by providing actionable insight to support their business planning, product development and go-to-market initiatives.

Visit [ovum.informa.com](http://ovum.informa.com) to learn more.

## OVUM CONSULTING



We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at [consulting@ovum.com](mailto:consulting@ovum.com).