Service Provider Markets

2020 Research Agenda

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Mike Roberts
Research Director

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 but the pace, scale, and strategic implications of change vary significantly by service provider, country, region, and market segment.

2020 research themes

SERVICE PROVIDER STRATEGIES

- 5G service provider strategy, services & market outlook
- Mobile, broadband and TV markets to 2025
- Service launches and innovation by segment
- Market convergence & consolidation
- Service provider strategy and performance benchmarking

AMERICAS

- US service provider consolidation & convergence
- Americas 5G service provider strategy, services & market outlook
- Americas service provider innovation
- Americas service provider digital strategies
- Service provider strategy and performance benchmarking

ASIA

- Asia service provider digital strategies
- Asia 5G service provider strategies, services & market outlook
- Asia enterprise markets
- China is powerhouse of a diverse region
- Service provider strategy and performance benchmarking

EUROPE

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

MIDDLE EAST AND AFRICA

- MEA service provider digital strategies
- MEA 5G service provider strategies, services & market outlook
- MEA service provider innovation
- MEA market dynamics

REGULATION

- Regulating future networks
- Getting the balance right on OTT
- 5G spectrum a priority in 2020
- A decisive year for digital economy regulation

WHOLESALE

- National wholesale market studies
- Developing wholesale channels and channel partners
- The case for wholesale-only service providers

5G ACCELERATOR

- 5G early learnings and market direction: how to prepare for growth
- Outlook for 5G. Towards vertical and solution-oriented use-cases
- New approaches to network ownership

Service Provider Strategies

The Market Challenge

Service providers worldwide 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 revenue while investing in new digital platforms and services such as 5G, OTT, and IoT.

Transformation is high on the agenda as service providers drive 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.

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

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 country.

What's new for 2020?

5G Market Outlook 2020–25 – evaluate the impact 5G will have on service provider strategies, operations, and services with 5G market analysis and five-year forecasts.

Global Mobile, Broadband and TV Outlook 2020–25 – 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 2020–25 – understand the future of the near $1tn global mobile market with detailed forecasts and analysis by region, country, and segment.

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 launch plans and strategies of service providers worldwide.

Telco Services Innovation Radar – gauge where service providers are innovating and investing with telco service launches tracked by segment with case studies and analysis on leading innovations.

Service provider reports – best practice and learnings on the world's top 40 service providers.

Financial benchmarks – 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.

Fixed broadband subscription and revenue forecasts – assess the state of the fixed broadband market.

Themes for 2020

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 as it improves mobile and fixed broadband services in its initial phase but then increasingly drives network and service transformation creating significant new market opportunities and disruption.

Mobile, broadband, and TV markets to 2025
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 service providers. Track the size, health, and future of the industry's core services through regular in-depth subscription and revenues forecasts for mobile, and TV services through 2025 with segmentation by region and major country.

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 digital giants, traditional telcos, or disruptive startups through detailed global tracking of service launches in more than 20 segments – including IoT, OTT, TV/video, security, mobile money, and customer loyalty – enhanced by case studies on the most successful new and innovative services.

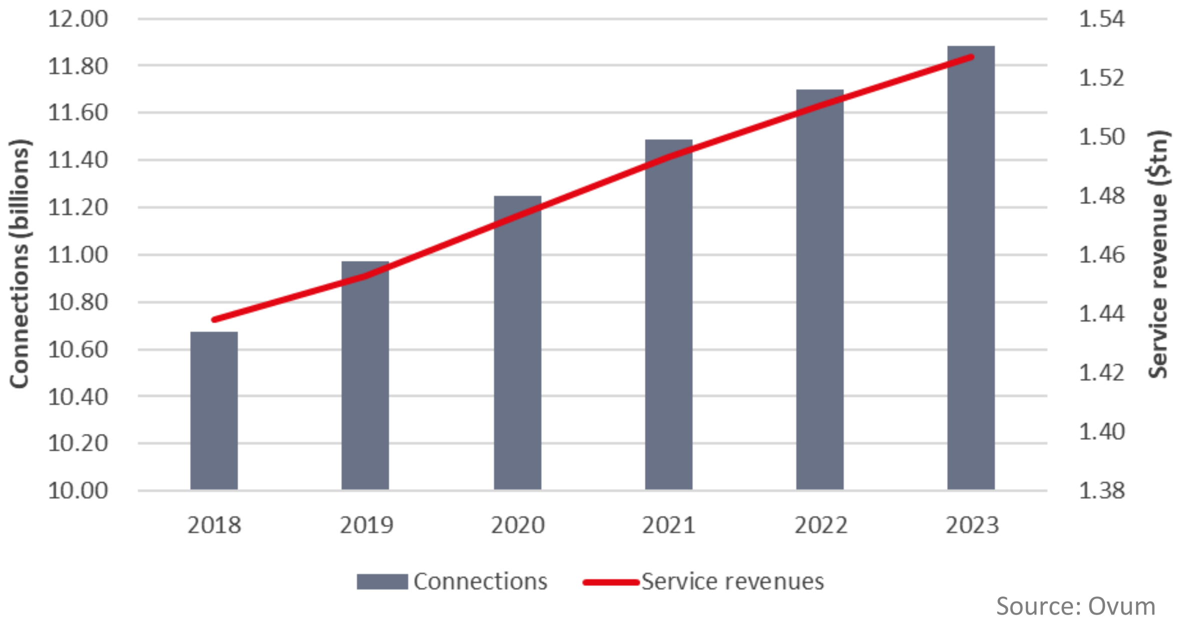
Market convergence and consolidation
The nexus of competition is expanding from inside to across major segments such as mobile, broadband, TV, and OTT as digital giants such as Facebook, Amazon, Apple, Netflix, and Google disrupt and dominate markets. Assess the impact on both communications and digital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

Themes for 2020, continued

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 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.

Global mobile, broadband, and pay-TV revenues will top $1.5tn in 2023 driven by close to 12 billion connections

Global mobile, broadband and pay TV connections and service revenues



Source: Ovum

Americas

The Market Challenge

The race for 5G is on and US service providers are moving fast hoping to use 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. 2020 will also see major consolidation in the US as the merger between T-Mobile and Sprint is likely to close, reducing the number of major mobile players in the market from four to three. Telcos are also betting billions that scaling up significantly through M&A will help them regain some of the market power and share seized by digital OTTs in North America and beyond.

In Latin America, 5G will launch in selected markets in 2020 but 4G will remain the dominant mobile technology for years to come. For service providers, 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.

Ari Lopes
Principal Analyst

How Ovum helps you

Understand major trends and competitive dynamic across the Americas at the regional, country and operator levels with in-depth analysis and market data.

Assess significant initiatives and developments in the Americas such as digital strategies and services, and the prospects for 5G, with detailed case studies and operator and country profiles

Size and compare markets; identify trends, risks and opportunities; and develop strategies based on comprehensive market data and forecasts.

What's new for 2020?

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

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

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 telecoms and TV sectors including mobile, fixed broadband, pay TV and OTT video.

Operator reports – detailed portrait and analysis of the major operating groups in the Americas, 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 Americas.

Regional and country datasets – comprehensive set of data and forecasts for the region and major countries within the region.

Themes for 2020

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

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 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 but will face a host of strategic, technical, and commercial challenges along the way.

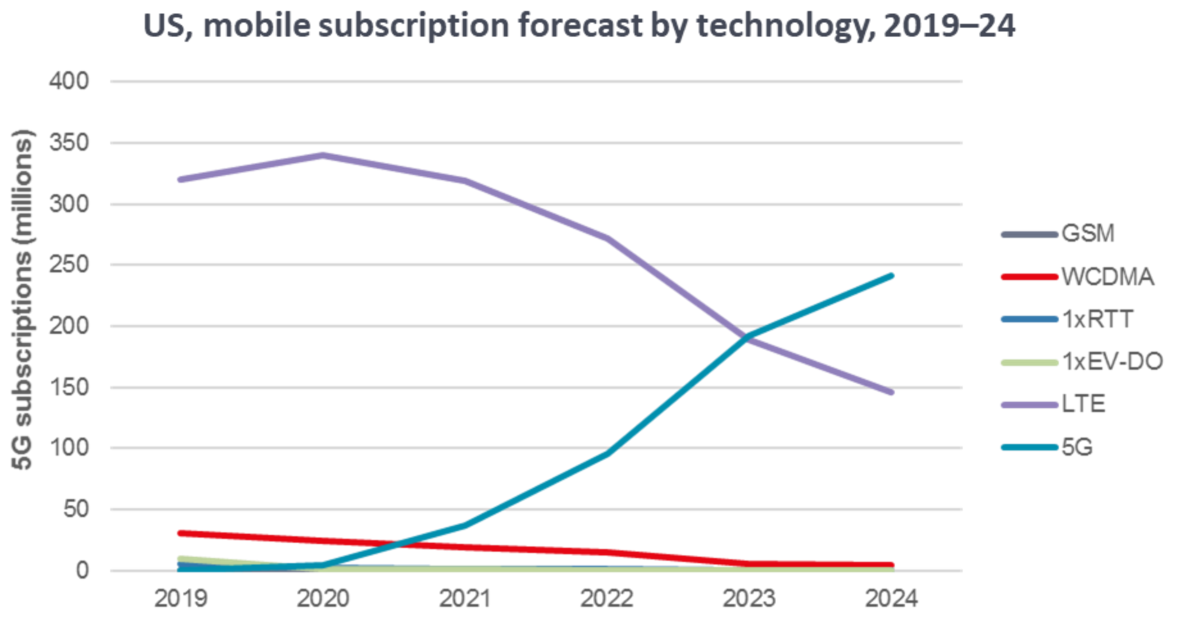
Americas service provider innovation
Acquisitions will allow operators to reduce costs, expand distribution channels, and offer premium content, but innovation will remain a key challenge for a sector that needs to drive growth in existing and new markets. Ovum will assess innovation strategies in the region across sectors such as digital media, video, IoT, cloud, and networks, through 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.

Themes for 2020, continued

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 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.

Ovum forecasts that 5G will become the leading mobile technology in US by 2024 when there will be 242 million 5G mobile subscriptions representing 62% of the total market.



Source: Ovum

Asia

The Market Challenge

The Asian communications market is in a period of transition. The boom years of connection growth are giving way to a more saturated market. This is driving trends that are shaping the Asian CSP market.
In east and southeast Asia, fixed broadband and smartphone penetration are generally high and there is a shift to value-added services and bundling of OTT services. However, competition and regulation in markets such as China and South Korea are putting downward pressure on prices. In central and southern Asia, dominated by India, income limitations continue to hold back migration from feature phones to full smartphones. This is limiting scope for upsell to bigger data packages and next-generation OTT bundling.

Asian CSPs are responding to these pressures as best they can. In the enterprise segment, opportunities in value-added services such as cloud and IoT are growing. However, some are seeking mergers and acquisitions (M&As), or even thinking about infrastructure sharing.

David Kennedy
Practice Leader

How Ovum helps you

Understand major trends and competitive dynamic across Asia at the regional, country and operator levels with in-depth analysis and market data.

Assess significant telco initiatives in Asia such as digital-service deployments, enterprise strategies, and the launch of 5G, with detailed case studies, profiles, and topical reports.

Size and compare markets, identify quantitative trends, and develop strategies based on comprehensive market data, forecasts, and quantitative analysis.

What's new for 2020?

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

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Operator reports – detailed portrait and analysis of the major operating groups in Asia, 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 Asia.

Regional and country datasets – comprehensive set of data and forecasts for the region and major countries within the region.

Themes for 2020

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 5G cell deployment, and network strategies for rural and remote areas through analysis and case studies.

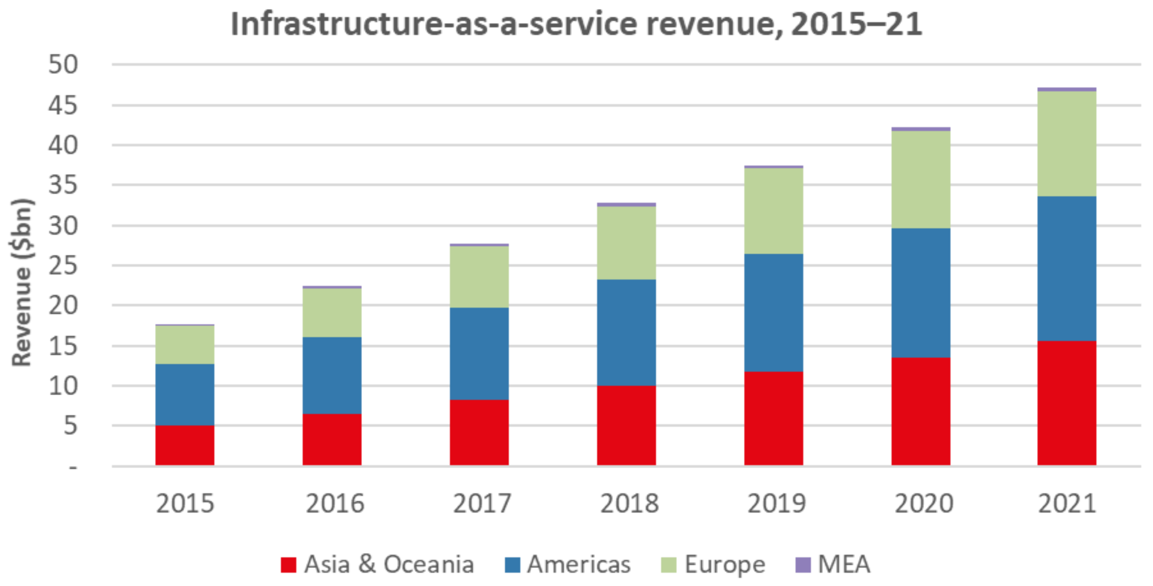
Asia enterprise markets
Ovum will report on the progress of Asian enterprise and wholesale markets, as telco operators and their hyperscale competitors deploy cloud and IoT technologies and services. Ovum will monitor and analyze cloud and IoT developments and prospects within the region, and make recommendations about provider and regulatory 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 analyze the complexities of this huge and influential regional market.

Themes for 2020, continued

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 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.

> *Although Asia's cloud market has lagged the Americas, it is catching up. IaaS revenues in Asia will grow at 18.8% CAGR to 2021, in comparison to 13.5% CAGR in the Americas and 16.6% CAGR in Europe.*



Source: Ovum

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 is mounting in 2020.

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.

Dario Talmesio
Practice Leader

How Ovum helps you

Understand major trends and competitive dynamic across Europe at the regional, country and operator levels with in-depth analysis and market data.

Assess significant initiatives and developments in Europe such as digital strategies and services, FMC, and the prospects for 5G with detailed case studies, profiles, and topical reports.

Size and compare markets; identify trends, risks, and opportunities; and develop strategies based on comprehensive market data and forecasts.

What's new for 2020?

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

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

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

Case studies – detailed assessments of specific service deployments in Europe.

Regional and country datasets – comprehensive set of data and forecasts for the region and major countries within the region.

Themes for 2020

5G launches in Europe – create your proposition now
5G will increasingly impact European markets in 2020 as service providers roll out 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 are more than just 4G+1.

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 driving the integration of access networks. Ovum will assess the implications and provide a long-term view of "unified networks" with special attention 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 revenues, IoT will branch out to consumer and B2C 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, compare strategies and results, and make recommendations for providers.

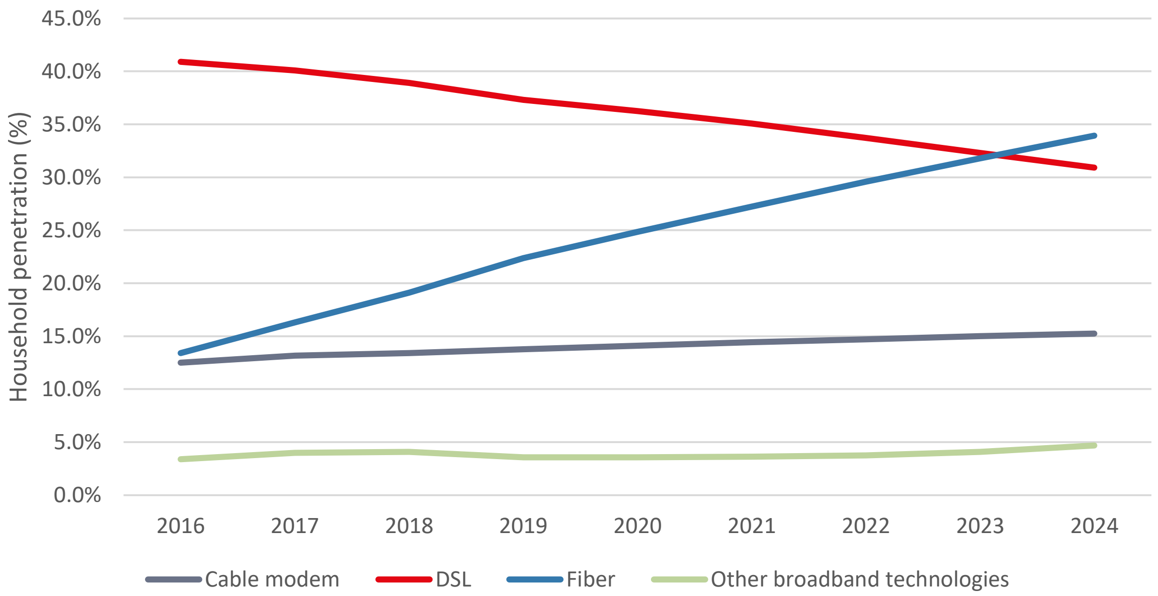
Themes for 2020, continued

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 give the detailed understanding of local market conditions that is essential for service providers to thrive in the region.

> *Europe's fiber broadband market will grow at a CAGR of 9% to top 100 million subscriptions in 2024, when fiber will overtake DSL as the top fixed broadband technology in the region.*

Europe fixed broadband penetration by technology, 2016-24



Source: Ovum

Middle East and Africa

The Market Challenge

Telecoms markets in the Middle East and Africa (MEA) have become more competitive, complex, and mature, and service providers can no longer rely on past strategies for growth and success.

However, demand for data is growing strongly, driven by the rollout of broadband networks, particularly mobile broadband, and the increasing affordability of smartphones. The challenge for service providers is to make the best use of the rising demand for data, and the opportunities it 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.

Matthew Reed
Practice Leader

How Ovum helps you

Understand major trends and competitive dynamic across MEA at the regional, country and operator levels with in-depth analysis and market data.

Assess significant initiatives and developments in MEA such as digital strategies and services, and the prospects for 5G, with detailed case studies, profiles, and topical reports.

Size and compare markets; identify trends, risks, and opportunities; and develop strategies based on comprehensive market data, forecasts.

What's new for 2020?

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

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

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 telecoms and TV sectors including mobile, fixed broadband, pay TV and OTT video.

Operator reports – detailed portrait 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 MEA.

Regional and country datasets – comprehensive set of data and forecasts for the region and major countries within the region.

Themes for 2020

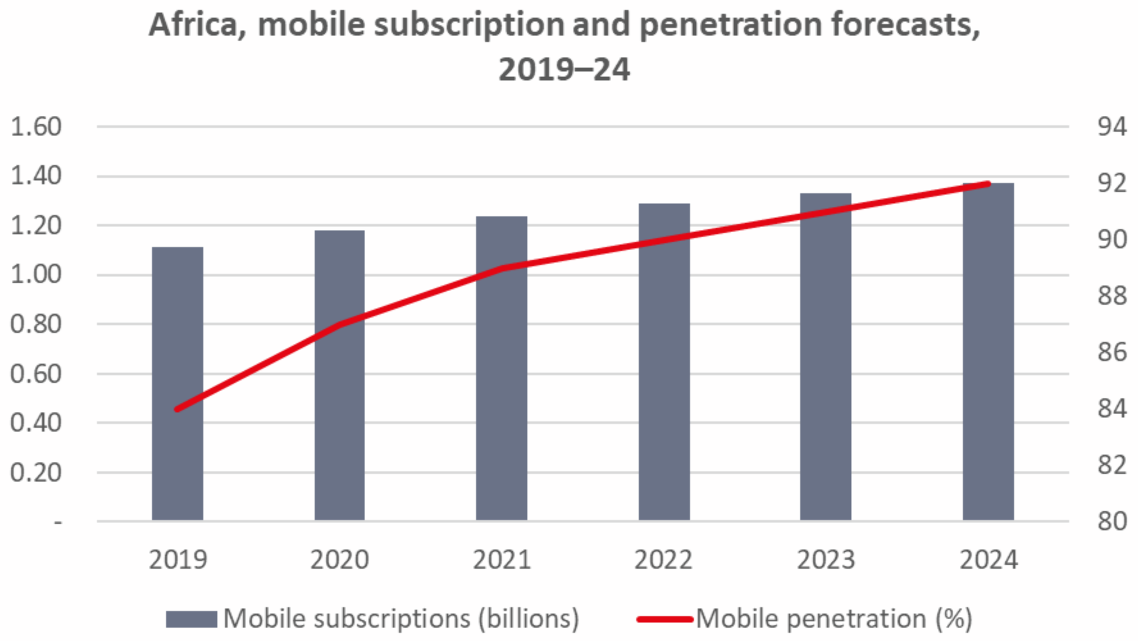
MEA service provider digital strategies
MEA service providers are increasingly focusing on digital strategies including the transformation of their own operations as well as the development of new services. Ovum will analyze and assess the digital strategies of major operators across the MEA region, and 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 – were among the first in the world to launch commercial 5G services. Ovum will monitor and analyze 5G strategies in MEA and track the development of 5G in the region as part of the comprehensive coverage of regional broadband markets. There are a few very advanced telecoms market within MEA, but the region as a whole has a substantial broadband deficit, and Ovum's research into broadband markets and strategies will also cover 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 analyze product and service innovation in the MEA region, identifying trends and making 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 gives the detailed understanding of local market conditions that is essential for service providers to thrive.

There are already more than one billion mobile subscriptions in Africa, and the number of mobile subscriptions on the continent will rise from 1.11 billion at end-2019 to 1.37 billion at end-2024, Ovum forecasts. Mobile penetration at end-2024 will be 92%.



Source: Ovum

Regulation

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 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.

Sonia Agnese
Senior Analyst

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.

What's new for 2020?

Reports on regulatory approaches to new technologies – reports assessing the regulatory challenges of new and emerging technologies such as AI, IoT, and blockchain.

Improved spectrum and National Broadband and Digital Strategies trackers – new interactive, visual tools to aid access and analysis of data and developments.

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

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 across and interconnection rates across over 60 countries worldwide and over time.

Themes for 2020

Regulating future networks
5G, fiber-to-the-x and IoT will increasingly underpin tomorrow's digital economy. But their high rollout costs and radical potential also pose questions fundamental to the future of investment and competition. Ovum will identify and analyze 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. Spectrum policy will continue to be critical.

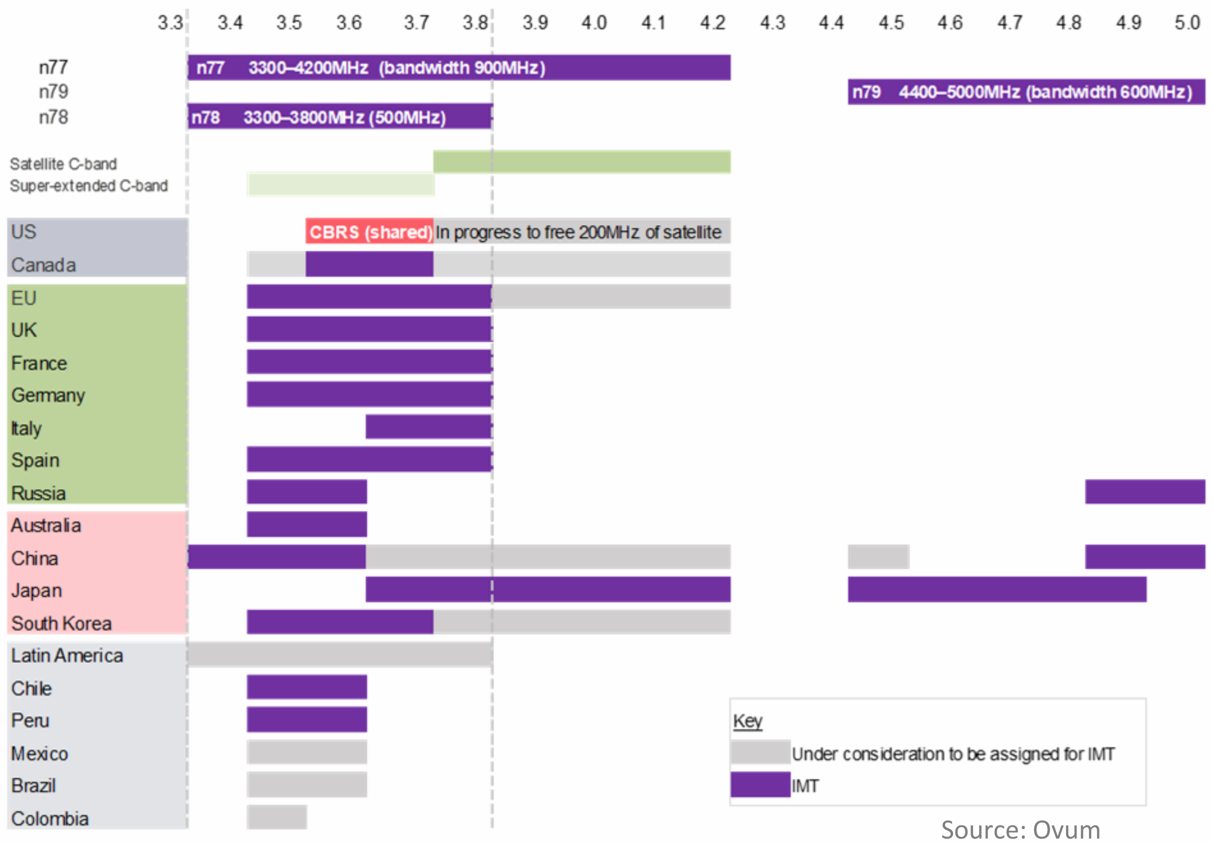
Getting the balance right on OTT
Innovation in telecoms, media, and technology has never moved faster, thanks to the speed at which services delivered "OTT" of the internet can be launched and evolved. Critics claim a lack of regulation gives OTT providers an unfair advantage over traditional counterparts, 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.

5G spectrum a priority in 2020
A clear spectrum roadmap is a key enabler that will help make 5G a reality. Regulators should set spectrum licensing conditions that encourage the high investment required for the development of 5G services. The process of identifying and allocating spectrum for 5G and re-farming bands in a timely manner and under economical viable conditions is a key concern of all the industry players towards 5G adoption.

A decisive year for digital economy regulation
The largest tech firms are becoming more controversial, and technology policy is starting to take center stage, with these players exerting a global market dominance never seen before. Despite the rapid and continuous evolution of technology markets, regulators must continue to care about two main things: fostering competition and protecting consumers. How to address this new paradigm is one of the central regulatory dilemmas of this new digital economy. Solving the taxation controversies is a high priority.

> 5G planning will gain significant momentum with more than 15,000MHz of spectrum already planned to be auctioned in 2020 and 2021.

3.5GHz core pioneer band global harmonization status



Source: Ovum

Wholesale

The Market Challenge

Wholesale is a valuable and growing channel to market for telcos. It provides opportunities to reach customer segments that direct channels cannot, to improve economies of scale by carrying more traffic over the same infrastructure, and to win back revenue when retail business is lost to competitors. Wholesale services are also critical to the delivery of increasingly complex retail communications services, such as 5G and IoT.

Although traditional wholesale services such as voice transit and long-distance capacity are commoditizing fast, wholesalers are responding through innovation, differentiation, and digital transformation. The adoption of technologies including API, SDN, NFV, and blockchain is enabling wholesalers to increase their efficiency and effectiveness at serving their customers.

David James
Practice Leader

How Ovum helps you

Identify the growth markets and leading players with wholesale market forecasts and market share analysis.

Assess innovative wholesale strategies, services, and partnerships to counter the commoditization of traditional services and better respond to customer needs.

Understand how wholesalers are reaching and serving additional customer segments with research into the variety of indirect channels used by CSPs and how they support their channel partners.

What's new for 2020?

Wholesale announcements tracker – summaries of significant wholesale market announcements including new service launches and enhancements, infrastructure deployments and upgrades, industry collaborations, and other market developments during the year, with brief analysis of their potential market impact.

Key Deliverables

Global wholesale market forecast – updated and extended forecasts of national and wholesale market revenues.

Wholesale innovation analyzer – analysis and evaluation of innovative wholesale services, strategies and partnerships announced during 2019 with Ovum's assessment of their potential for success.

European wholesale market share report – annual analysis of the wholesale revenues of leading telcos in Europe, together with investigation of how and why their shares of this mature market are evolving.

Wholesale customer survey – our biennial survey of the needs, priorities and views of the buyers and users of wholesale services.

Themes for 2020

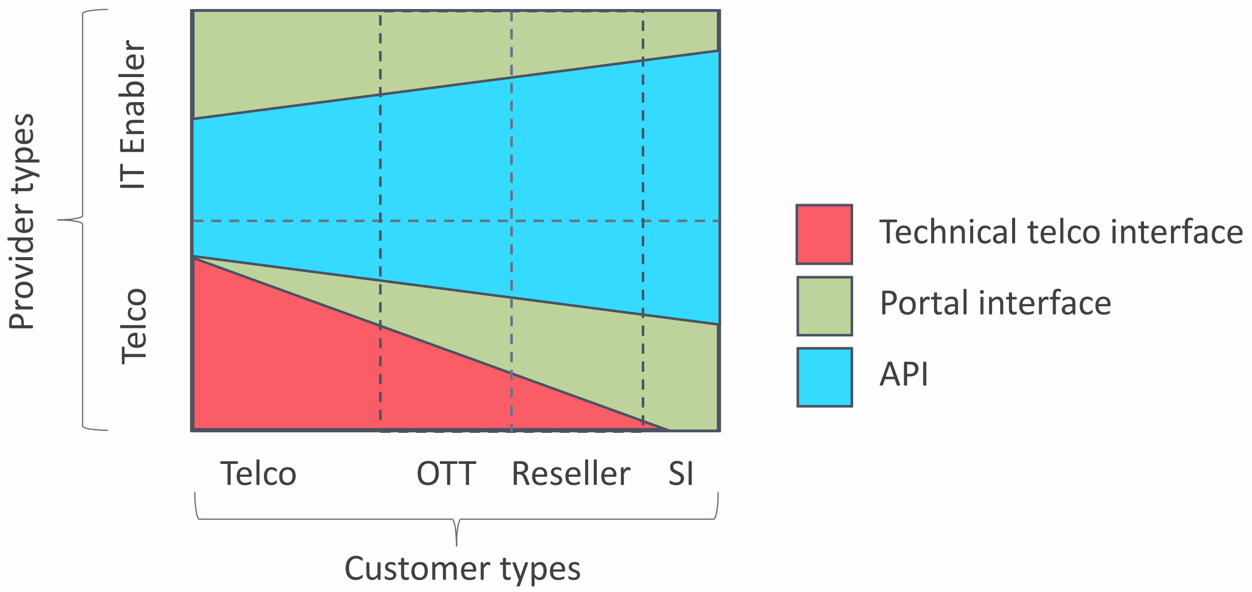
National wholesale market studies
During 2020, we plan to analyze the national wholesale markets in a variety of countries. Our research will include an overview of the wholesale players in the market, wholesale market dynamics and service trends, and customer segmentation. The studies are intended to provide service providers with the key information and analysis they require when considering entering a new market.

Developing wholesale channels and channel partners
Service providers employ a range of indirect channels to reach different customer segments, including traditional wholesale, B2B2C, distributors, resellers, and agents. We will research the channel partner programs operated by a variety of telcos to discover how they aid their partners, including tailored services, interfaces, contract terms, customer care, and other forms of support.

The case for wholesale-only service providers
The number and variety of wholesale-only communications service providers is growing. Some are focused on providing broadband access services, some offer point-to-point capacity services, and others are limited to mobile network services. Their business models differ significantly from those of companies that also serve consumer and enterprise retail markets. We will analyze the impact wholesale-only service providers have on the markets where they operate and decide whether they have a long-term future in the telecoms ecosystem.

> *Ovum's annual analysis of new wholesale services, strategies, and partnerships has evaluated 99 shortlisted innovations launched by 70 different companies.*

Wholesale customer segments' preferred wholesale customer interfaces



Source: Ovum

5G Accelerator

The Market Challenge

Service providers are under intense pressure to revitalize the anemic economic performance of their businesses.

5G offers a rare chance to reignite fortunes, become more competitive, and find new growth opportunities, especially in vertical segments. But 5G will also require a complete rethinking of the way CSPs approach telecoms and IT infrastructure, and the way they work with the wider ecosystem of suppliers, partners, and customers.

Understanding where and how to play in a world that promises thousands of 5G business cases is the main challenge for CSPs and their vendor partners. Ovum will help CSPs and vendors in separating the hype from the reality, the immediate opportunities, and the long term strategic direction.

Dario Talmesio
Practice Leader

How Ovum helps you

CSPs: Understand the 5G opportunity, make better informed planning, and learn lessons from their peers.

Vendors: Acquire an informed view on CSPs and overall market direction.

Identify telcos' strategies for 5G monetization beyond eMBB and FWA, into the future of vertical and horizontal implementations.

Understand how service co-creation works and how growth opportunities are exploited in a solution-oriented environment.

Evaluate the performance of CSPs and markets as their initial 5G experience becomes measurable. Is the huge 5G promise starting to deliver results? If so, where and how?

What's new for 2020?

Research into the **5G performance CSPs** who have launched 5G eMBB and FWA in 2019 – **measuring and benchmarking their results across the world.**

Exploring the **next phases of 5G** – how does 5G change the approach to enterprise and enterprise-vertical use-cases for humans and things?

Sizing and forecasting 5G CSPs and 5G markets – the global and local picture.

Cases studies and lessons learned in 2019, and new approaches for 5G in 2020.

The big 5G questions answered: Public or private? Vertical or horizontal? At the edge or centralized?

Key Deliverables

Bi-annual forecasts covering 5G forecast by market for the main use case (eMBB , FWA).

Quarterly market trackers on 5G deployments by CSP, including vertical use cases.

Reports on 5G proposition – network, marketing, pricing, and service strategy by CSPs.

Reports on the strategies and platforms required to manage 5G ecosystems.

Market reports evaluating leading strategies for 5G propositions.

Consumer and enterprise insights into behaviors and attitudes towards 5G.

Key conference and event summaries and briefs.

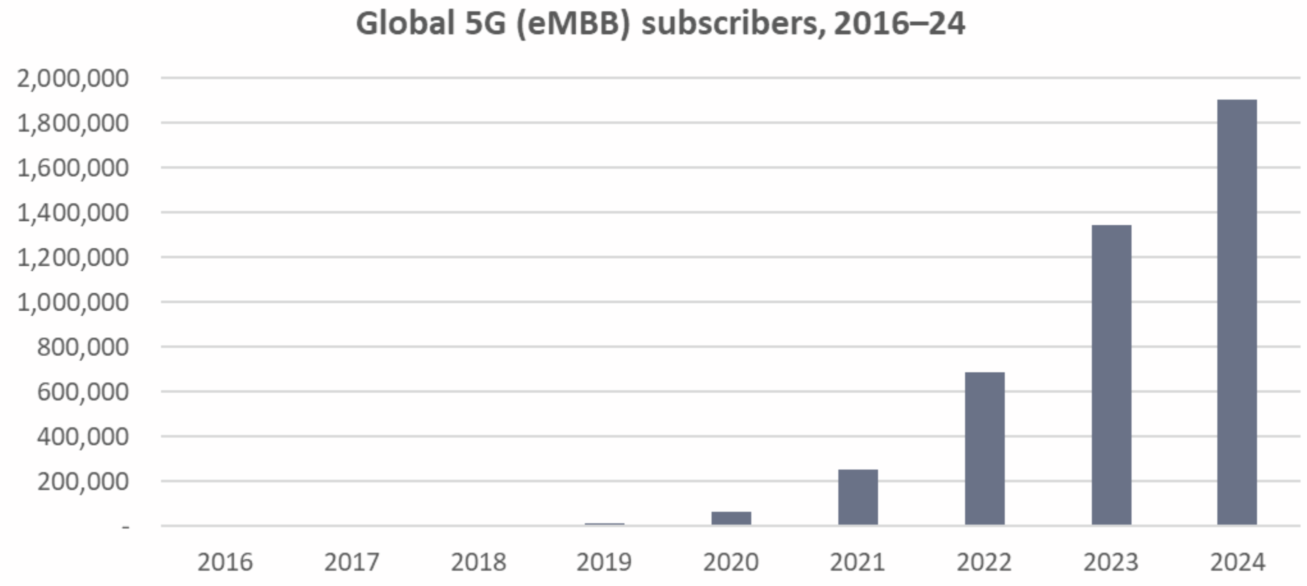
Themes for 2020

5G early learnings and market direction: how to prepare for growth
2019 marked the year of vast commercial 5G deployments in key markets. Globally, CSPs will want to learn from these first-movers and understand how to create appealing market propositions for consumer and enterprise customers. Key to 2020 is understanding the performance of 5G eMBB and 5G FWA, in particular how to monetize it and the service service strategy to adopt to complement the connectivity business - QoE, pricing strategies, marketing, network, services, and devices.

Outlook for 5G: toward vertical and solution-oriented use cases
As networks become more pervasive, CSPs and vendor partners start planning enterprise-specific and vertical-specific commercial use cases. Some will require a different approach to business models but also new approaches to service design and implementation. 5G will start being implemented for machine-oriented (e.g., IoT) use cases, and there will be a renewed focus on the monetization of data and insights. The overarching theme will be ecosystem management and service co-creation.

New approaches to network ownership
The arrival of 5G is a catalyst for new approaches to network planning, deployment, and ownership not just by CSPs but also enterprises and industries. Network sharing will be more frequent, as will vertical dis-integration, with CSPs selling off tower businesses. Meanwhile, enterprises will want to have more direct control of their networks and including possibly owning it. Does it leave CSPs out of the picture? Will CSPs compete head-to-head with their network vendors? Or, will CSPs become expert on made-to-measure networks?

CSPs will have 1.9 billion 5G mobile subscribers by 2024, more than 20% of overall global subscribers.



Source: Ovum

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