

Service Provider Strategies Intelligence Service

Part of the Service Providers and Markets Service Area Package

Data and research assessing the growth opportunities for service providers and exploring the strategies necessary for success, including guidance on designing, building, positioning and partnering to most effectively monetize new services. This Intelligence Service focuses on service providers, their performance, service innovations, and current and future role in the wider digital economy.

“ Growth beyond market share is back on CEOs’ agenda. CSPs must re-think their identity and sharpen their digital tools to play and sell in an ever co-opetitive market. As boundaries between Hyperscale, telco, and IT vendors and CSPs blur, telecom operators must start considering all business models and technology options and write a new social contract with customers, employees, and government. ”

Dario Talmesio
Research Director

Service Provider Strategies Intelligence Service

Part of the Service Providers and Markets Service Area Package

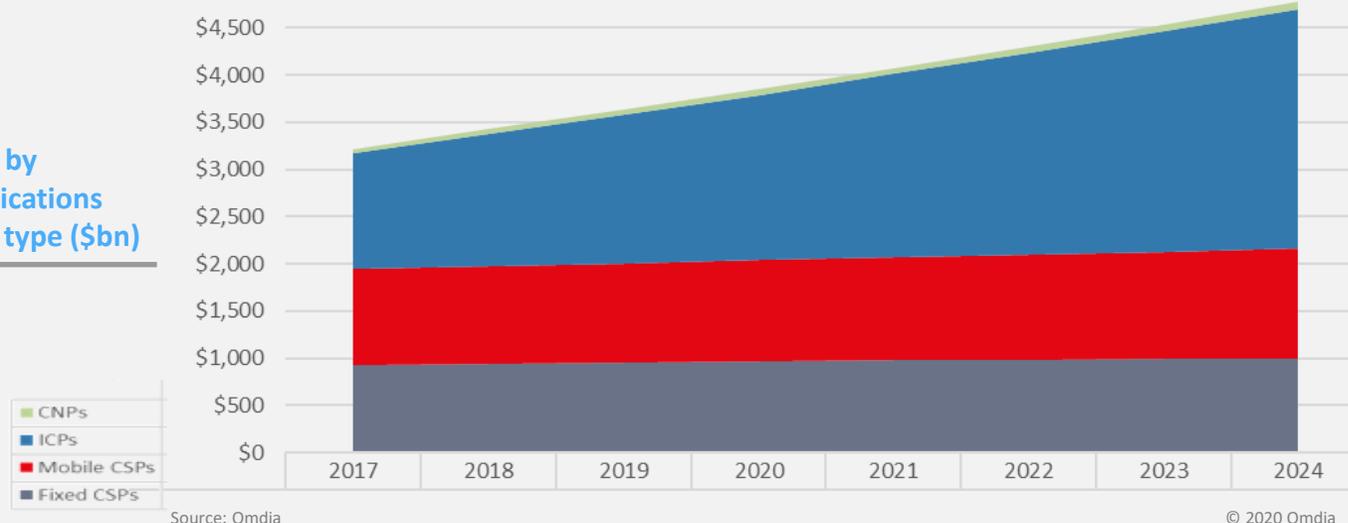
HOW OMDIA HELPS YOU

- Transform your strategy based on the best practices of leading 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 how effectively service providers are performing, innovating and monetizing new services.

KEY QUESTIONS ADDRESSED

- Which services will drive future market growth?
- Which markets offer the greatest potential for new entry?
- How should service providers look to deploy and monetize new services such as 5G?
- Where and why are traditional and new competitors growing?
- What will the impact of COVID-19 be across the digital economy?
- How will service revenues and subscriptions for mobile, fixed and TV markets change?
- How best should service providers compete in a changing market?
- What are the major innovations being implemented by service providers across the globe?
- What are the most effective investment and partnership strategies for exploiting emerging digital services?
- Which technologies are underpinning new service innovation?

Revenue by communications provider type (\$bn)



Service Provider Strategies: Our Expert Analysts



Dario Talmesio
Research Director
Service Provider
Strategy & Regulation



Paul Lambert
Principal Analyst
Service Provider
Strategy & Regulation



Sarah McBride
Principal Analyst
Service Provider
Strategy & Regulation



Stephen Myers
Principal Analyst
Service Provider
Strategy & Regulation

Service Provider Strategies: Deliverables



MARKET DATA

—Annual—

5-year forecasts for mobile and fixed services, and service provider revenue and Capex, CSP and Hyperscale financial benchmarks.



MARKET TRACKING

—Quarterly—

Quarterly market trackers focusing on 5G service innovation, telco-consumer tech platform partnership, and fixed-mobile convergence



REPORTS

—Ongoing—

Exploring major service provider trends, service innovation and monetization, and topical themes.



OPERATOR PROFILES

—Annual—

Detailed analysis of major operating groups with additional analysis of the digital strategies of major operators.



ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



ANALYST ACCESS

—Ongoing—

Prompt responses from Omdia's analyst team to urgent and unique questions.

Service Provider Strategies: Market Data

Mobile Subscription and Revenue Forecast

Five year forecast including the outlook for total mobile subscriptions by technologies, as well as a forecast for mobile service revenues.

DETAILS

Frequency: Annual

Measures

- Subscriptions
- Revenues
- ARPU
- Penetration

Geographies:

- Global and regional totals

COVERAGE

- **Subscriptions** (Total, Prepaid, Postpaid)
- **Unique users** (Total, Population penetration)
- **Mobile service revenues**
- **Mobile voice revenues**
- **Non-SMS revenues**
- **Mobile SMS revenues**
- **ARPU** (Total, Mobile voice, Non-SMS, SMS)
- **Subscriptions** (by technology)

Mobile Broadband Subscription Forecast

Five year forecasts for the mobile broadband telecoms market including total, mobile, and portable broadband device connections.

DETAILS

Frequency: Annual

Measures

- Subscriptions
- Population
- Population penetration
- Percentage of active mobile broadband users
- Mobile broadband penetration

Geographies:

- Global
- Totals by region (4) and sub-region (8)

COVERAGE

- **Non-M2M subscriptions** (Subscriptions)
- **Mobile connectivity – Total - mobile broadband** (Subscriptions)
- **Mobile handsets** (Subscriptions, Percentage of active mobile broadband users)
- **Portable devices** (Subscriptions, Percentage of active mobile broadband users)
- **Mobile broadband penetration**
- **Total population**
- **Population penetration**

Service Provider Strategies: Market Data, cont'd

Fixed Wireless Access Subscription Forecast

Five year forecasts for the fixed wireless access broadband market, with fixed wireless access broadband connections split by technology as well as total broadband connections.

DETAILS

Frequency: Annual

Measures

- Subscriptions

Geographies:

- Global
- Totals by region (4) and sub-region (8)

COVERAGE

- Fixed broadband total
- Fixed wireless 5G
- Fixed wireless LTE
- Fixed wireless WiMAX
- Fixed wireless proprietary

Fixed Broadband Subscription and Revenue Forecast

Five year forecasts for the total fixed broadband market, providing total broadband connections split by technology as well as service revenues.

DETAILS

Frequency: Annual

Measures

- ARPU
- Service revenues
- Subscriptions
- Household penetration

Geographies:

- Global and regional totals

COVERAGE

- Fixed broadband total
- Cable modem
- DSL
- Fiber
- Fixed wireless access
- Other broadband technologies

Service Provider Strategies: Market Data, cont'd

Total Fixed Voice Subscription and Revenue Forecast

Five year forecasts for the fixed voice market including subscriptions by technology, service revenues, subscription revenues, and call revenues.

DETAILS

Frequency: Annual

Measures

- Subscriptions
- Call revenues
- Subscription revenues

Geographies:

- Global total
- Totals by region (4) and sub-region (8)

COVERAGE

- **PSTN** (Subscriptions)
- **ISDN** (Subscriptions)
- **Fixed wireless telephony** (Subscriptions)
- **Cable telephony** (Subscriptions)
- **VoIP** (Subscriptions)
- **Fixed voice** (Call revenues, subscription revenues)

5G Mobile and Fixed Subscription Forecast

Five year forecasts for 5G mobile subscriptions and 5G fixed subscriptions worldwide, split by region and country.

DETAILS

Frequency: Annual

Measures

- Subscriptions

Geographies:

- Global total
- Totals by region (4) and sub-region (8)

COVERAGE

- **5G mobile**
- **5G fixed**

Service Provider Strategies: Market Data, cont'd

Communications Provider Revenue & Capex Forecast

This forecast covers four types of communications providers: fixed and mobile CSPs (communications service providers, or telcos), internet content providers (ICPs), and carrier-neutral providers (CNPs).

DETAILS

Frequency: Annual

Measures

- Capex
- Total Revenues

Geographies

- Global total
- Totals by region (4) and sub-region (8)

COVERAGE

- Financials – Fixed connectivity
- Financials – Mobile connectivity
- Financials – CNP & ICP

Telecom and Hyperscale Platforms Financial Benchmark

A snapshot of the consolidated group level financial performance of 39 largest telecom companies and 28 hyperscale platforms, with benchmarking against the average.

DETAILS

Frequency: Quarterly

Measures

- Revenue growth
- EBITDA margin
- Operating expense ratio
- Capital intensity
- Free cash flow (FCF) to sales ratio

COVERAGE

- 39 largest telecoms groups – Communication Service Providers (CSPs)
- 28 hyperscale platforms – Internet Content Providers (ICPs)

Service Provider Strategies: Market Tracking

5G Service Provider Tracker

Service provider 5G launches, operator 5G service announcements, and 5G initiatives by country and region

Frequency: Quarterly

This tracker covers service provider 5G launches, operator 5G service announcements, and 5G initiatives. It includes 5G spectrum used for commercial services as well as 5G network-sharing agreements. It provides a detailed and comprehensive view of concrete 5G launch plans and the 5G-specific services offered.

Hyperscale and Telco Partnerships Tracker

Telco and hyperscale internet players' partnership activity in key emerging digital markets.

Frequency: Annual

This tracker covers telco and hyperscale internet players' partnership activity in key markets driving digital growth. It identifies where and how companies are partnering to extend their reach beyond their core legacy activities into digital service growth markets.

Service Provider Fixed-Mobile Convergence Tracker

Service providers' fixed-mobile convergence (FMC) activities

Frequency: Annual

This tracker covers global service providers' FMC activities at three levels: the corporate-level convergence of fixed/TV with mobile businesses, fixed/TV with mobile at commercial-bundling level, and fixed and mobile technology convergence for the provision of broadband services (convergence at a technology level).

Enhanced Telco Communications Tracker

This tracker comprises data on operators' commercial launches of VoLTE, Wi-Fi calling, voice over Wi-Fi, Rich Communications Services, and Web Real-Time Communications.

Frequency: Quarterly

Service Provider Strategies: Market Tracking, cont'd

Telco Services Innovation Radar

A detailed summary of new and innovative services that were announced or launched by TV, fixed, mobile, and integrated operators

Frequency: Quarterly

A summary of 246 new and innovative services that were announced or launched by TV, fixed, mobile, and integrated operators during the quarter. The radar collates publicly confirmed news sources and presents the data in an easily navigable format.

Global Mobile Sub-Brand and Digital Brand Tracker

Sub-brands and digital brands by mobile service providers

Frequency: Annual

This tracker analyzes the global penetration and adoption of sub-brands and digital brands by mobile network operators.

Service Provider Strategies: Reports and Analysis

Trends to Watch Reports

Analysis of the latest market developments and predicted trends, with an assessment of the implications and recommendations for key market players.

Frequency: Annual

Our Trends to Watch reports provide an annual assessment of the major trends predicted to shape key markets in the region in following year, with recommendations.

Case Studies – Assessing Outperformance

Detailed assessments of specific service innovations and roll outs

Case studies covering services or products launched by service providers. These reports analyze service evolution and go-to-market strategy, with proof points exploring outcomes.

Operator Reports

Detailed portrait and analysis of the major operating groups in the Europe, including financial and operational KPIs.

Frequency: Annual

Our Operator reports offer a comprehensive portrait of major operating groups, with analysis of their performance (including financial performance), market dynamics, key developments, strategic approach, with an overview of their latest product and service launches..

Digital Operator Profiles

Assessments of the digital strategies of major operators in the region.

Frequency: Annual

A series of profiles analyzing the digital strategies of leading operators. Each profile assesses the operator's digital strategy, its digital service developments and deployments, and the performance of and prospects for the group's digital businesses.

Service Provider Strategies: Reports and Analysis, cont'd

Communications Provider M&A Review and Outlook

This report provides an insight into the recent merger and acquisition (M&A) activity

Frequency: Quarterly

This report focuses on M&A activity within the four types of communications providers: both fixed and mobile CSPs (communications service providers, or telcos), internet content providers (ICPs), and carrier-neutral providers (CNPs). Through the M&A route, communications providers get an opportunity to gain entry into new geographic markets, acquire top talent, and consolidate downstream activities

Thematic Reports

Regular commentary and analysis reports addressing critical themes impacting service providers.

[COVID-19: The Road to Recovery in Service Provider Markets](#)

Analysis of the outlook for service providers and markets globally as the world emerges from the COVID-19 pandemic.

[Service Provider Strategies: Healthcare](#)

The healthcare sector offers long-term growth with COVID-19 serving as a catalyst for reform. Service providers have opportunities for growth through digital transformation and the implementation of new technologies.

[ESG: Strategies for Creating a Purpose-Led CSP](#)

The research examines how leading communications service providers (CSPs) are pursuing environmental, social, and governance (ESG) strategies to create purpose-led organizations and benefit our environmental and societal well-being.

[Service Provider Digital Strategies: Global Benchmark and Analysis](#)

This benchmarking report assesses and compares the digital strategies of 10 major service provider groups around the world based on a new benchmark.

Related Content: Service Providers & Markets Service Area Coverage



Service Area Package: **Service Providers & Markets**

Service Provider Strategies
Intelligence Service

Service Provider Markets
Regulation Intelligence Service

Service Provider Markets –
Americas Intelligence Service

Service Provider Markets –
Asia Intelligence Service

Service Provider Markets –
Europe Intelligence Service

Service Provider Markets –
MEA Intelligence Service

World Information Series –
Service Provider (WIS-SP)

5G Spotlight Service

World Cellular Information
(WCIS) Series Spotlight Service

World Telecoms Financial
Benchmarks Spotlight Service

World Broadband Information
(WBIS) Series Spotlight Service

World Cellular Investors
Spotlight Service

About Omdia's Service Providers & Markets Services

Omdia provides expert analysis and data on service providers, their markets, and the strategies for success. We can help you assess which markets and services will drive future growth, understand the changing digital landscape, navigate market regulation, benchmark competitors, and select the appropriate partnerships and business models to exploit new technologies, services and segments.

Our global team of domain and local market experts, leveraging the most comprehensive industry dataset available, will help you unlock value in entirely new and profound ways.

Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. **Contact us** if you have a project that you would like to discuss with a member of the team.

Our “Ask an Analyst” Service Provides Best in Class Customer Support

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

Draw on our expertise

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

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



Tom Coate
Customer Success
Manager



Kâren Dyer
Customer Success
Manager



CONNECT WITH US

 @OmdiaHQ | [ondia.com](https://www.ondia.com)

Customer success

E: customersuccess@ondia.com

SALES

US: +1 (212) 652 5335

APAC: +61 (0)396 016 700

EMEA: +44 (0)7771 980 316

ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.