

# Carrier Wi-Fi: Monetization Models and the Future of Wi-Fi in the Context of 5G

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## Abstracts

Carrier Wi-Fi: Monetization Models and the Future of Wi-Fi in the Context of 5G

### SUMMARY

'Carrier Wi-Fi: Monetization Models and the Future of Wi-Fi in the Context of 5G', a thematic research report by GlobalData, provides an analysis of the business models available to different operators to benefit from and monetize Wi-Fi networks. It includes data and insights on the Wi-Fi technology status and trends with respect to the growth in installed base of Wi-Fi hotspots, homespots and devices and traffic worldwide. The report outlines the future evolution of the technology as mobile networks migrate to 5G. Built on real-world examples, the report examines the five key business models for Wi-Fi, their fit by operator type and the critical considerations and strategic options for operators and vendors.

The installed base of Wi-Fi enabled devices continues to grow, driven in large part by the growth of smartphones. The technology has developed to better support operators and opened the door to multiple business models, enabling lower costs, new revenue streams and improved services.

The report is structured as follows -

Section 1: Market Context. This section provides data and insights on the Wi-Fi technology and outlines the future of the technology.

Section 2: Business models. This section provides an assessment of business models built around Wi-Fi worldwide, and examines these business models from

the perspective of their fit for different operator types taking into account operator portfolio breadth.

Section 3: Key findings and recommendations. We conclude the report with a set of key findings and critical considerations and recommendations on Wi-Fi network evolution and business models.

## SCOPE

Key findings of the report include -

Standardization, performance improvements and operator support continue to drive Wi-Fi adoption. Homespots and low cost hotspot deployment have increased the total number Wi-Fi areas (hotspots + homespots) from less than 30 million in 2013 to 85 million in 2016, with expectations of 113 million for 2018.

Wi-Fi supports multiple business models for operators. There are five broad Wi-Fi business models available to network operators which can and should be used in combination (they are not mutually exclusive), though not all are relevant to all operator types. Integrated (fixed-mobile) and fixed-MVNO operators can benefit from all the different business models available while mobile first operators are more limited.

The investment and operational costs of Wi-Fi must be kept low because the revenue upside is limited. There are multiple partnership opportunities which can help to keep costs down including joint ventures, roaming, wholesale, OTT providers, Wi-Fi specialists, venue owners, advertisers, payment providers etc.

Wi-Fi network revenue upside must be maximized and thus sold across the organization from the consumer and business facing departments to advertising/media and wholesale divisions.

Wi-Fi helps networks evolve by accelerating migration to 4G, freeing up spectrum for refarming and can form part of future heterogeneous networks and 5G. Wi-Fi or not, unlicensed spectrum will form part of future LTE and 5G networks.

## REASONS TO BUY

The report provides a comprehensive examination of operator business models in the global market to help executives fully understand market dynamics, determine what works and what doesn't, formulate effective product development plans and optimize resource allocation and return on investments.

Each business model is analyzed to highlight notable approaches as well as how different types of operators, whether fixed only, fixed-mobile or mobile only are leveraging the technology to suit their particular context.

The report highlights innovative and progressive approaches from operators around the world, including both developed and developing regions.

The report discusses concrete opportunities for Wi-Fi, providing a number of actionable recommendations for operators and vendors.

The report provides multiple insights into Wi-Fi including the current status, standards development, traffic growth, factors impacting use, network cost minimization approaches and technology evolution.

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