

Next Gen Telcos: New Telco Economics by 2025

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Abstracts

This report provides an assessment of the potential futures for telcos by 2025, taking into account expected evolutions in the digital economy, with a focus on connectivity, IoT, OTT and IT markets. It first puts in perspective the key stakes that telcos have to tackle. It then looks at how major telcos are indeed trying to address with transformation plans for 2020 through an in-depth benchmark. A very large focus on 13 digital markets is then conducted to determine the major opportunities for telcos leveraging some of their genuine assets. The report finally draws 4 disruptive scenarios for 2025 and assesses for each of them the likely portfolio of services, the organisation and processes, the potential revenues (with a breakdown per type of revenue) but also the EBITDA and FCF margins, showing how telco economics could be radically transformed.

Telcos are in a crucial need to reinvent themselves. Their pure connectivity revenues (voice, messaging, broadband, linear TV) are expected to be flat at best at 1,130 billion EUR for the next 4 years, while CAPEX are continuing to increase (6% in 2015) with the development of digital services (OTT, IT and IoT), pressuring the networks with an ever increasing demand.

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