

The Future of the Telecoms Industry: How to navigate in a climate of intense disruption and change

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Abstracts

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SUMMARY

The telecommunications industry is in a curious place right now. Mobile phone usage, internet traffic and data consumption has exploded and is only set to accelerate as far as most can see, yet telecoms companies that provide the facility to do any of these things, are struggling to grow at present.

There are multiple issues but principally it is not obvious what business model telecoms companies should adopt in order to secure their futures. Furthermore all kinds of large new disruptive events in the industry are looming over the next decade, from the emergence of new technology that might disrupt the main players, the building of the 5G network, trying to realize the dream of the internet of things and colossal M&A activity.

There are some good opportunities present in the industry, but without careful planning and redesigning of the traditional telecommunications business model, it is entirely possible some of the world's biggest carriers might struggle to stay independent over the next few years.

KEY HIGHLIGHTS

As traditional voice, fixed line and messaging business models are eroding away, telecoms companies are having difficulty finding the best method to innovate and capture new business.

All kinds of internet based services are effectively absorbing the key areas that telecoms companies once dominated. The future for these companies involves finding new monetization pathways, but deciding just which to pursue is proving complex for the world's largest carriers.

The positive for these companies though is that they control the means of distribution and the infrastructure which is an extremely strong business position to be in. Telecom companies are attempting multiple new business models, from providing content, to complete connectivity packages, spreading into new business sectors, consolidation and tiered speed packages. As yet though, no clear method for escaping the traditional telecoms model has emerged.

Every few years the telecommunications industry comes up with another technology designed to replace older networks and handle the increased demands on data, latency and a wide variety of other concerns.

The latest technology under development is 5G and as with other generations it is being hailed as far superior to anything that has been seen before. 5G should provide speeds that will allow the IoT concept to be realized and creating smart cities.

If the technology is as strong as the industry claims, it could have some interesting effects of the nature of competition in the market, because customers may start to choose 5G technology over fixed broadband in their homes for instance.

However some analysts are skeptical and see this technology as another money spinner with limited value, when new Wi-Fi technology might actually make expensive new 5G mobile contracts unnecessary.

Appetite for merger and acquisition in the telecoms industry has been strong for a long time among leading company CEOs. Regulators and politicians, however, have not been so keen. Previous efforts directed towards merging some of the big players in the United States have failed on account of concerns competitiveness would suffer enormously.

Now the Justice Department in the US has lost the case against the planned merger between AT&T and Time Warner the way has been left open for consolidation. Many within the industry say this is required, primarily for two reasons: to compete against the rapidly expanding Chinese telecoms giants, and to plough the required level of

investment into the new 5G network. Much change is afoot.

SCOPE

Examine the business landscape in the telecoms industry and how the big players are coping

See just how the environment is difficult and new business strategies need to evolve

Explore some of the biggest M&A deals, why they happened and how they are fairing

Prepare for the new 5G and Internet of thing environments and how they might effect the big carriers

REASONS TO BUY

What are the big players doing in the telecoms industry to cope with static revenue problems?

Why is the industry suffering from issues of static revenues?

Will 5G and the internet of things give the industry a boost?

What players have a successful strategy at present?

Contents

Executive Summary

The telecoms business model is under threat

5G is perhaps not the boost that the telecoms industry needs

Merger and acquisition activity in telecoms forecast to change market landscape

Internet of Things to transform industry and consumer behaviors

Telecoms industry disruptors are approaching from all angles

The Telecoms business model is under threat

The era of static revenues is proving difficult to escape

What business model to choose is a huge problem for the carriers

Reinvesting in networks and becoming a utility company is working for some

Content provision is an expensive and imperfect solution

Many that have invested in content cannot make it work

A three stage solution focusing on advertising might be the answer for some carriers

5G is perhaps not the boost that the Telecoms industry needs

5G is a significant upgrade over the previous generations

Carriers see IoT as being their key opportunity with 5G

Is upgrading the mobile network worth it for struggling telecoms companies?

It is difficult to predict whether IoT tech will even need 5G support

5G might not actually generate any new revenues for the big carriers

Some carriers and manufacturers are being more cautious around 5G technology

There is a battle developing between Wi-Fi and 5G

Merger and acquisition activity in telecoms forecast to change market landscape

AT&T and Time Warner merger deal will transform telecommunications in United States

Judge ruling on AT&T and Time Warner ignites showdown for possession of 21st

Century Fox

T-Mobile deal with Sprint faces obstacles but would appear likely to go ahead

Ability of Europe to create genuine global player is about to be tested

Mixed signals from French telecoms regulators leaves much uncertainty regarding the future of European market

Internet of Things to transform industry and consumer behaviors

Initially sidestepped, telcos are finding relevance in IoT development

Industrial Internet of Things will provide opportunities for telecommunications in industry of tomorrow

Automotive market is first industry to bring mass market appeal to IoT

Everyday life is expected to be a natural home for Internet of Things, attracting telecoms firms, but progress has been slow

Telecoms industry disruptors are approaching from all angles

Telecoms disruptor companies see internet access as an opportunity market for new satellite broadband tech

New generations of Wi-Fi and disruptor tech Li-Fi are en route and how that will affect the market is unclear

Telecoms carriers are responsible for internet security and the threat is increasing

OTT brands are continuing to disrupt telecoms business models

The point of complete saturation might be approaching

Key Findings

Appendix

Sources

Further Reading

Ask the analyst

About MarketLine

Disclaimer

List Of Tables

LIST OF TABLES

Table 1: UK 5G spectrum auction 5th April 2018

List Of Figures

LIST OF FIGURES

Figure 1: Average UK household spend on communications services 2005 to 2015

Figure 2: Fixed line and wireless telecoms global market value 2013-2022

Figure 3: T-Mobile network coverage map 2014-2017

Figure 3: Leading global telecoms companies revenues compared 2013-2017

Figure 5: UK Average monthly data consumption per household GB

Figure 6: 5G theoretical speeds compared to previous technologies, Mbps

Figure 7: 5G theoretical latency compared to previous technologies, milliseconds

Figure 8: Top ten countries by average mobile speed in 2018

Figure 8: Top ten countries by average broadband speed in 2018

Figure 10: AT&T Time Warner merger

Figure 11: Comcast merger with 21st Century Fox is possible

Figure 12: T-Mobile and Sprint merger in US is being mooted

Figure 13: Vodafone

Figure 14: Amazon Web Services revenues 2013 to 2017 (\$bn)

Figure 15: BP

Figure 16: Model of a 'connected power station'

Figure 17: Huawei and Groupe PSA, DS 7 Crossback artists impression

Figure 18: Internet of Things home

Figure 19: OneWeb satellite

Figure 20: Li-Fi connecting to a device

Figure 21: OTT messaging and voice services

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