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The evolving IPTV and VAS model for the telecoms operator

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Abstracts

Industry convergence is increasing the pressure on telcos to refine the role they wish to play in content markets. Historically, telcos have participated in two of these content markets. Mobile operators have offered value-added services (VASs) such as portals, ringtones, wallpapers, and premium voting or competition lines; while fixed-line operators have offered premium broadcast services such as pay-per-view video on-demand (VoD) and subscription IPTV services. Mobile operators have had more success in the VASs market than their fixed-line counterparts in the premium broadcast market, as fixed-line operators have had to compete with established cable and satellite operators that have responded to their entry by pushing deeper into quad-play markets. However, the VASs model is now also facing significant competition as the OEM-controlled app store challenges the operator controlled portal as the primary channel for content delivery on mobile devices.

This report reviews the evolving market for content services, examines the causes of strategic failure and success in the case studies of BT and Orange, and offers a framework for telecoms operators looking to develop their business-to-consumer (B2C) content service strategy and vendors looking to enable this market.

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