

# Is Telecom Innovation at Risk?

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## Abstracts

Telecom systems vendors' R&D spending remains in the range of 13-14% of their revenues (on average), but venture capital funding of telecom start-ups has fallen steadily in recent quarters. Telecom-related patent filings are still rising at a strong rate, but there's a growing consensus that telecom vendors' differentiation must come from software, applications, and services. We agree, but believe current VC and vendor R&D trends threaten innovation.

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Executive summary

In a nutshell

Ovum view

Innovation is threatened by fewer VC commitments and big vendors' cost pressures

What is the cost of lower levels of investment?

How can vendors use their increasingly scarce resources?

How can vendors get VCs interested and engaged in telecom again?

What role do the Chinese vendors have to play?

What does the power shift to the mobile world imply for innovation?

What does the shift in growth to emerging markets imply for innovation?

Tight budgets for telecom vendors, big and small, create challenges and opportunities

VC support of telecom dropped starkly after the 1999–2001 bubble and weakened further in 2008–9

Industry increasingly relies on the big vendors for advances in technology

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