

Mobile broadband profitability: a shared responsibility

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Abstracts

Vendors are continuing to use the 'scissor-effect' diagram in their marketing to highlight the threat of rapid data traffic growth in developed markets and the risk it brings to operator margins. However, marketing based on this diagram today is increasingly irrelevant because the industry has moved on. There will be ample opportunities over the coming five years for operators to avoid the cataclysm. Nevertheless, the industry as a whole needs to work together to stop the 'scissor-effect' becoming a self-fulfilling prophecy.

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Executive summary

In a nutshell

Ovum view

Please, enough about the 'scissor-effect'

Unrepresentative of today's reality and ignores mitigating factors in the future

Operators need to focus on the network and tariff innovation

Infrastructure vendors need to build trust and not just networks

Wholesalers risk being cut out of the market

Regulators have a supporting role

Key messages

Deconstructing the scissor-effect

Vendor scare tactics are undermining the response to a valid threat

Mobile broadband is not voice

Cost allocation is critical

Not all operators are created equal

Network congestion today is a focused issue

Power-users hogging a shared resource

Device penetration is a key factor

Peer-to-peer is not just an issue to content providers

Very few cells affected

Traffic is a future threat only if nothing is done

Even flat-rate tariffs can be tenable

Vested interests pose the greatest threat to profitability

Vendors are making too much noise

Operators are guilty too

Protecting future profitability is a shared responsibility

Time for a cocktail

The network remains key for operators for the next five years

Short-term gains must support long-term goals

Traffic management is a short-term win, but also viable for the longer term

Backhaul upgrade is inescapable

Offloading traffic is gaining prominence

Infrastructure upgrades bring efficiencies today and tomorrow

Tariff innovation is necessary, but difficult for operators to achieve

A move towards packages tiered by speed

Time-based access makes a comeback

Gold, silver and bronze: a lot of talk, but an insurmountable challenge

Potential for dynamic pricing to reduce busy hour peaks
Fair usage policies may be dull and clumsy, but they must be enforced
Infrastructure vendors must build trust and not just sell boxes
Wholesalers need to revise their business models
Regulators need to support industry development

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