

Telecoms in 2020: consumer

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Abstracts

By 2020, a plethora of different players will supply, deliver and manage the consumer digital world, which will be dominated by the Web, video and interactivity. The role of telcos will have altered dramatically and many will no longer be 'telcos' in the traditional sense of the word. They will be plugged into consumer services in different ways around the world depending on their competencies, assets, brand and individual market dynamics. They will have had to rapidly evolve their business models to address new and highly disruptive competitive threats. In some cases, this will mean stepping back from the most hotly contested digital arenas such as retail content and advertising, and focusing on core competencies.

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In a nutshell

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Ovum view

Key messages

Broadband is firmly established as the fourth utility

Video will dominate the next ten years

A crucial role in supporting quality of experience (QoX)

Broadband access will account for the majority of telco consumer revenues in 2020

More than ever, success for consumer telcos will depend on scale and efficiency

Recommendations for telcos

LEAN or SMART? Plan now for the mid to long term to create the right foundations for success

Regardless of which role is chosen, costs need to come down

Aggressively develop network intelligence capabilities and traffic/usage insights

Address complexity as a priority: a prime domain is the digital home

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2013–16

2017–20

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Development timeline

2009–12

2013–16

2017–20

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Development timeline

2009–12

2013–16

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