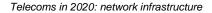


# **Telecoms in 2020: network infrastructure**

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# **Abstracts**

Ovum's core Telecoms 2020 scenario has implications for the owners and suppliers of network infrastructure. Scaling, from transactions to terabits, will require silicon, software, and systems innovation in a climate where investment is constrained by traffic growth outstripping revenue growth. Telcos must develop charging models that tie resources to revenues. Vendors will divide into two camps — full-service and specialized — to more effectively support their customers' evolution.





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Executive summary

In a nutshell

Scope

Ovum view

Everyone wants to use it, but how it will be paid for remains unclear: What's a poor network to do?

Key messages

Competitive forces narrow the options: Full-service vendors/system integrators and specialized vendors

Software enables open networks and leads to business model redefinitions and security concerns; but hardware still matters

Meeting the "multi-terabit challenge" will require significant industry R&D and cooperation on standards

The network demarcation point is very likely to move into the connected home and office

Networks will become more intelligent as they track presence, location, and

authentication and optimize and manage terabits and transactions

Recommendations for telcos and network infrastructure vendors

Telcos

Infrastructure vendors

Telecoms network infrastructure in 2020 — the broad view

Network infrastructure industry overview

The SMART, the LEAN, and the in-between

Drivers of change in network infrastructure

Application bandwidth requirements, fueled by IP video, will increase the role of fiber

The mismatch between resources and revenues will make network investments increasingly challenging

Opportunities and risks derived from open networks

Network infrastructure industry structure and player positioning

Structural changes

Network infrastructure vendors split into "full service" and "specialized"

Vendors with full-service aspirations include Alcatel-Lucent and Ericsson

Customer partnership pitfalls

Distinctions between "hardware" and "software" vendors blur

A rise, or at least not a decline, in captive component capabilities within system vendors is likely

Managed service providers / outsourcers / SIs will have specialized roles



Opportunities and threats **Opportunities** Threats Network infrastructure development timeline — vendors Network infrastructure customers and markets The world of 2020 Fixed and mobile operators become increasingly indistinguishable Network infrastructure development timeline — customers 2009-2012 2013-2016 2017-2020 Network infrastructure services and revenues The world of 2020 Network infrastructure development timeline — services and revenues Network infrastructure services and technologies The world of 2020 Network technology life cycle stage Network infrastructure development timeline — technologies Investment considerations



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