

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.

Contents

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

List Of Tables

LIST OF TABLES

Table 1: Drivers of change and their impact — network infrastructure

Table 2: Network infrastructure vendor positioning

Table 3: Key events and drivers summary — network infrastructure vendors

Table 4: Customers needs and drivers and their impact on network infrastructure requirements

Table 5: Business models and revenues, network infrastructure vendors

Table 6: Network infrastructure technology development timelines

List Of Figures

LIST OF FIGURES

Figure 1: DWDM's ability to keep backbone costs down through capacity increases is leveling off

Figure 2: Infrastructure vendors' changing models

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