

What Mobile Operators Can Learn From Utilities

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Abstracts

The mobile industry is now facing similar challenges to those that confronted the fixed telecoms industry five years ago. Gone is the sumptuous revenue growth in mature markets as data revenues only go so far as offsetting falling voice revenues. Instead, mobile operators are faced with slow growth or no growth at all as they battle the commoditization of their basic voice and data services, while struggling to find new revenue sources. Faced with this reality, mobile operators should tap into the experience of the utility industry on how to adapt to a slowly growing, but stable, cash-rich market.

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In a nutshell

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Scope

Industry structure

Structural/functional separation can unlock value in the network

Utilities have learnt how to rely on a single network

Femtocells and Wi-Fi offload break the operator's ideological opposition to the utility model

Products

Voice and data are mostly all that the operator has

Cross-selling can work occasionally, but for most players it won't work

Operations

Stability and good cash flow excite investors

It is time to reassess the FMCG versus utility services model

The first role of new technology is to improve operational efficiency rather than create new revenues

Mobile assets should be profit centers and operators need asset management expertise

Pricing

Two pronged pricing – rental plus usage

Voice is subsidizing data: a need to rebalance data pricing

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