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Managed Services in LTE Era Report 2011-2016

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Abstracts

Managed Services Enter the Rapid Growth Stage: Which Mobile operators are taking advantage of this OpEx saving opportunity?

Are the other operators losing out by not formulating managed services strategies?

Managed Services is having a transformative affect on the wireless value chain in general and operators in particular. The managed services market was around $55 billion in 2010, we believe the market is poised to reach $86 billion by 2016.Global trends that are driving managed services include the explosive growth of data services and advent of LTE networks. Our research suggests that increasing number of operators want to capitalise on the plethora of tangible and intangible benefits offered by managed services. This report details all the latest developments in this sector along with the strategies that will help the operators to maximise their gains.

Mastering the Value Disciple of Operational Excellence

MNOs need to understand the importance of optimising business processes across the functional and organisational boundaries and externalise all non-core activities. Maintaining current operations while building for the future requires enormous investment in enabling systems, tools and business processes. Several operators are addressing these challenges by transferring network related functions as well as of B/OSS and service delivery application, infrastructure and business process management functions to an outsourcing partner.

This report describes the managed services strategies for MNOs who are planning to deploy LTE. In LTE environment, MNOs need to adopt a lean business model and overcome organisational limitations. This will help MNOs to reduce the payback period and maximise profits while remaining competitive. Operators across the globe are

embracing managed services particularly in the EMEA region, Asia Pacific and the Emerging markets of India and China. However, many US carriers view networks as a source of competitive advantage and do not want to embark on managed services strategy. Visiongain believes that these carriers will continue to manage the networks in-house until 2013, with LTE deployment providing the necessary cost saving needed to increase the EBITDA levels. We discuss these opinions and analyse their feasibility.

Capitalising on Managed Services - Strategies and Potential Revenues

Our research suggests that increasing number of operators believe that they do not need to have a complete control over their LTE networks. This outlook is gearing operators towards managed services. Visiongain believes a properly structured and executed managed service for LTE networks will deliver between 10% and 20% OpEx savings, which in certain cases can have a real effect of increasing EBITDA by 8%.

What is Different about this Report?

We conducted an independent and unbiased non-vendor affiliated assessment of the Managed Services topic. We interviewed key industry players in order to gain an in-depth view of the market. We believe such a research will help you in assessing the market potential of Managed Services.

Some of the key points that emerged from this research include:

In 2011, Managed Services have evolved into a broad category. It is one of the fastest growing areas in the telecoms industry. Visiongain believes Managed Services will play a key role in the way the telecoms industry will shape up in the coming years.

Managed Services now extend beyond the traditional definition of outsourced IT services to cover managing applications stores and emerging areas such as cloud computing and SaaS (Software as a Service). Managed Services will evolve around the cloud.

Managed Services will further gain popularity as the drive towards cost-control with LTE networks intensifies.

Much of the growth in outsourced services is coming from EMEA (Europe, Middle East, and Africa) and Asia Pacific. Western Europe, India and China will emerge as key LTE Managed Services markets.

Visiongain believes outsourcing will save 25-30%in OpEx in an ideal case scenario, however if operators fail to integrate their various managed services initiative across their value chain, the savings reduce to 5-10%.

The degree and scope of managed service contract will vary greatly across the globe, but in all regions, operators will embrace managed services at some level.

Operators may find it easiest to stick with their existing managed services providers as they migrate to LTE.

We believe that with Managed Services operators can expect a faster ROI usually half the time compared to in-house LTE management.

Majority of operators in US will focus more on business strategy, sales and marketing and outsource technical and operational aspects by 2016.

Over 65% of MNOs will use some form of managed services by 2016.

Questions Answered by this Report

Which MNOs have adopted managed services for their LTE networks?

What is the market opportunity for managed services providers?

What are the implications for MNOs who embrace managed services and how does it affect their position on the value chain?

What are the benefits, challenges and barriers? Are there any negatives to be considered?

Do managed services enable MNOs to modernise and ease the transition from GSM to LTE?

Do managed services enable operators to finance the deployment of LTE?

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What direction are managed service deals gearing?

To what extent can managed service deals help drive transitions to LTE?

What impact can telecom vendor managed service deals have on the competitive mix of LTE service deployments?

What is the addressable market for managed services?

Who are the key players in the managed services market?

What are the drivers for managed services?

What are the regional differences in managed services adoption?

What are the operators' views on managed services?

How can managed services providers overcome operators' reluctance to use them?

What is the five-year forecast for managed services?

What are some of the innovative managed service offerings?

Where are the opportunities for managed services providers?

What is the SWOT analysis for Managed Services from Operator/Managed service Provider Perspective?

Who needs to read this report?

MNOs and MNVOs can make informed decision before embarking on managed services strategy. They can gain an insight into MSP's strategies and compare various solutions on the market

Managed Services Providers can identify the types of MNOs likely to embark on a managed services strategy. They can also analyse the consolidation opportunities in this market by 2016. The report also offers insights into the market developments and recommendation to succeed in this competitive market place

Backhaul service providers can understand the LTE market dynamics and managed services strategies pursued by operators

Financial institutions: How will the search of new managed services opportunities shape the competitive landscape among telecom vendors and operators?

Greenfield operators can understand how to capitalise on managed services and gain competitive advantage over established players

Investors can understand the managed services offerings and market, its value chain and potential

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