2014 Research Agenda

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Our research business delivers strategic insight, global market data and primary research. We work in partnership with our clients to inform their decision-making with actionable advice and support.

CONFERENCE AND EXHIBITIONS
Our 150+ annual events and exhibitions are critical in driving the industry’s agenda. We bring together high-caliber decision-makers from the mobile, fixed, alternative, IT, wholesale, MVNO, broadband and satellite operator communities.

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The Telecoms Academy team delivers a public portfolio of over 50 training courses every year. The program includes intensive five-day Telecoms Mini MBA courses along with specialist next-generation technology courses.

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- WCIS World Cellular Information Service
- WBIS World Broadband Information Service
- WTVIS World Television Information Service

Key events include:

- COM World Series
- Cloud World Series
- Connect Global Events
- Broadband World Series
- Media World Series
- IRI Telecoms & Technology
- MA:DS
- VSAT Global Series
INFORMA TELECOMS & MEDIA HAVE BEEN THE LEADING PROVIDER OF STRATEGIC INSIGHT, KEY MARKET DATA AND FORECASTS FOR MORE THAN 25 YEARS.

Our analysts are spread across 5 continents and 13 research offices helping our clients make better decisions. Our team is accessible, responsive and connected to your markets, business goals and challenges.

Our clients rely on us to gather competitor and customer intelligence, steer product development and drive strategic planning.

Because our analysts spend most of their time engaging with our clients at events, briefings and through our support service, we are always close to your business needs.

WE CAN HELP YOU...

PLAN YOUR STRATEGIC DIRECTION:
– Prioritize growth opportunities
– Size market demand

BUILD COMPETITOR AND CUSTOMER INTELLIGENCE:
– Identify business drivers, threats and challenges
– Develop product, positioning and sales strategies

DRIVE PRODUCT DEVELOPMENT AND POSITIONING:
– Validate your business case and pricing strategy
– Prepare a market entry timetable

WHY CHOOSE US?

1. We provide a unique mix of in-market, sector and forecasting expertise to ensure local insight and a definitive view. We don’t sit on the fence.

2. Our analysts benefit from exclusive access to a broad community of senior-level decision makers. We don’t lock them in ivory towers.

3. We collect and interpret more data across more markets than anyone else. We don’t outsource data collection.

4. We offer a flexible model of client engagement across a broad range of formats. Choose from webinars, workshops, strategy sessions, written research, white papers and advanced database solutions.
Our services

INTELLIGENCE CENTRE

Intelligence Centre is the central online source of all of our advisory analysis, primary research, market data and forecasts. The service includes a number of powerful search, alerting and report tools including direct access to our analysts.

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www.informatandm.com/ic

WORLD CELLULAR INFORMATION SERVICE

WCIS remains the cellular world’s leading source of accurate, robust data and 5-year forecasts. The service tracks global mobile subscriptions, KPIs, financial and operational indicators in real time and includes direct access to our analysts.

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www.informatandm.com/wcis

WORLD BROADBAND INFORMATION SERVICE

WBIS is a complete broadband and multichannel TV resource featuring broadband, fixed-line telephony and multichannel TV subscriber numbers from 2000 to 2011 and broadband forecasts to 2017.

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www.informatandm.com/wbis

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WTVIS is a new, easy to use interactive forecasting tool which combines all of our TV market data and forecasts including: Pay TV and Free-To-Air, smart devices, smartphones, content, video, fixed and mobile broadband metrics for up to 148 countries.

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Consulting and customized research

OUR CONSULTING EXPERTISE IS FOUNDED ON OUR DEEP INDUSTRY ENGAGEMENT AND DELIVERED BY AN EXPERIENCED NETWORK OF ANALYSTS.

ALL OF OUR CONSULTING PROJECTS BENEFIT FROM OUR CORE MARKET DATA AND FORECASTING EXPERTISE AND EXCLUSIVE ACCESS TO A DIVERSE COMMUNITY OF C-LEVEL EXECUTIVES.

YOUR OBJECTIVES

- Message construction and validation
- Market education
- Go-to-market planning
- ROI justification
- Pricing and positioning
- Competitor tracking
- Customer segmentation and targeting
- Sales enablement
- 1-5 year planning

OUR SERVICES

- Benchmark analysis
- Surveys
- Webinars
- White papers
- Country analysis
- Company analysis
- Forecasts
- Go-to-market analysis
- Case studies
- Event moderation

THOUGHT LEADERSHIP

Educate, inform and engage your audience

WHITE PAPER

Client: Global network carrier

Project objective: Our client needed to understand the dynamics and drivers of the LTE roaming market in order to strengthen its sales and marketing message accordingly.

Informa approach: A combination of our high-level telecoms contacts and incisive analysis were at the heart of our approach. A resulting white paper used the findings of our global survey of network operators and a series of interviews with technology executives to explore this significant operator opportunity.

The international roaming market is at a crucial stage. Technology, strategic and regulatory forces all have a role to play as a broad base of customers increasingly look to use data services on their travels.

SURVEYS AND CONSUMER INTERVIEWS

Understand consumer behavior patterns to define strategic direction

STRATEGIC PLANNING REPORT

Client: Global network equipment provider

Project objective: Our client needed to understand and forecast the consumer market demand for data services and build a set of usage profiles to illustrate their impact on the network. It was necessary to understand behavior by device type, network access, service usage and data plan.

Informa approach: Benefiting from our partnership with a consumer research specialist, Informa tracked the mobile data adoption habits of 6,000 consumers across 12 different markets. This information was verified with operators via a number of interviews and an online survey of telecoms executives, which resulted in a series of five-year forecasts into mobile data usage by service category, traffic and revenues.
**RECENT CONSULTING ENGAGEMENTS**

**CASE STUDY**

**Client:** Global network equipment provider

**Project objective:** Our client wanted to promote a deeper understanding of the opportunities around mobile broadband in sub-Saharan Africa with the aim of educating a large audience of mobile operator executives. In order to provide an independent analysis of the market, our client worked with Informa to provide a view of the potential market size and the growing consumer demand for mobile broadband services.

**Informa approach:** To produce credible and meaningful analysis, Informa used the richness of its existing data to create a webinar presentation to an audience of mobile operator executives. As well as highlighting the size of the current market and using its forecasts to project the future size of the market, Informa used industry and consumer analysis to demonstrate the extent of the opportunity afforded by mobile broadband services.

**CUSTOMIZED MARKET INTELLIGENCE**

Support and enable your sales and marketing teams to target your customers more effectively

**QUARTERLY TREND ANALYSIS REPORT**

**Client:** Leading OSS/BSS vendor

**Project objective:** Our client wanted to position its solutions better in the context of its customers' strategic objectives. A detailed assessment of the challenges facing global communication service providers (CSPs) was required.

**Informa approach:** Informa's expert research on the strategies of global CSPs forms the background to this engagement, which monitors CSP activity via regular interviews and briefings on their performance and strategic direction. Each quarter, Informa highlights the key opportunities and challenges facing CSPs and presents these in a live webinar discussion with some of our client's business development executives dialing in to listen to and engage with Informa analysts.

**SPEAKING ENGAGEMENTS**

Connect your team and clients directly with our expertise

**CASE STUDY**

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Flexible deliverables

VISUALIZED DATA AND FORECASTS

Our online services now include powerful visualization tools which enable you to interrogate, manipulate and experiment with our data in powerful new ways.

POWERFUL DATA SERVICES

Our online databases enable you to perform advanced queries on the industry’s most complete collection of live, intelligently-sourced data including subscriptions, KPIs, financial and operational indicators.

TRACKERS AND FORECASTING TOOLS

Our time-series data and 5-year forecasting tools now include additional charts, graphs and tables which make comparative insights quick and easy.

ANALYSIS, CASE STUDIES AND COUNTRY PROFILES

Our cases studies and country profiles provide detailed analysis of service launches, service provider strategies and converged market dynamics.

Analysis of how operators use sub-brands to address the mobile usage needs of particular customer segments, such as students and cost-conscious consumers.
CONFERENCE PAPERS

Intelligence Centre includes exclusive access to the speaker papers from 150+ Informa Telecoms & Media annual events including Com World Series, TV Connect, Broadband World Forum, Cloud World Forum and LTE World Forum.

WORKSHOPS & STRATEGY SESSIONS

Workshops and strategy sessions enable you to engage one-to-one with our experts to assist in shaping your technology, marketing, content, device, partnership or operational strategies.

WEBINARS

Our regular webinars provide an opportunity to explore the latest topical market issues and major industry developments via engaging, in-depth analyst presentations.

INDUSTRY OUTLOOK

Now in its 12th year our annual Industry Outlook customer event brings together a world-class speaker line-up, our leading analysts and clients to discuss the issues shaping the market over the next 12 months.
Talk directly to our analysts

WE BELIEVE THAT PROVIDING DIRECT ACCESS TO OUR ANALYSTS IS CRUCIAL IN ENSURING OUR RESEARCH IS RELEVANT TO YOUR BUSINESS AND ACTIONABLE TO SUPPORT YOUR DECISION MAKING.

All of our services include direct access to all our global analysts enabling you to connect with the team via telephone, webinars and face-to-face briefings. Analyst access can be used to gain more insight into our findings, understand the background to developments or further explore our methodologies.

Unlike other research firms, analyst engagement is core to our business not an optional extra. Our teams and processes are structured to ensure analysts are available and responsive.

“Informa provides the industry’s leading client support service, both in terms of response quality and timeliness. Direct interactions with our analyst teams are routinely cited by our clients as crucial in shaping and validating their business strategies.”

Gemma Bunting is Customer Experience Manager for Informa Telecoms & Media’s Industry Research division. She is the primary point of contact for all client interactions across Informa’s premium data and research products. Gemma forms an invaluable connection between the Industry Research clients and the analysts behind Informa’s data and analysis.

Thank you very much for your excellent information. It is exactly what I was looking for. The presentation is really useful, especially in light of the fact that there is very little intelligence published on such emerging markets.

We found the information you provided to be very helpful, as your comments will help shape our work going forwards.

Thank you for being such a wonderful support for us, being so timely every single time, and always always helpful! I really appreciate it.

You saved my life on Monday morning, thank you very much!

Thank you very much for your timely response. We greatly appreciate the insight you have shared with us, as it will help us in our analysis of this continually changing, dynamic market.

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After going through the analysis you provided, I have to say that every word in both documents is beneficial and answers our current questions… as usual this is more than I expected! Thank you very much for your support and please pass my regards to your team.

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ANALYST ACCESS EXAMPLES

CLIENT:
I know that Informa has published research previously on the impact of Rogers One Number on ARPU, postpaid subscriptions and churn. Do you also have similar analysis on the impact of enriched communications propositions launched by operators (e.g., Libon, Bobsled, Tu Me, etc.)?

INFORMA RESPONSE
The main enriched communications propositions that we are aware of from mobile operators are as follows:

- Orange Libon
- Telefonica Tu Me and Tu Go (O2 UK)
- T-Mobile USA Bobsled
- AT&T Messages
- Verizon Messages
- Rogers Wireless Rogers One Number
- Joyn

Orange Libon
Giles Corbett gave a presentation at the Global Messaging World Congress in June, in which he shared some data/information with regards to the Libon service, as follows:

- The Libon service is currently being offered by Orange France’s digital brand, Sosh, as a €5 add-on monthly package which includes unlimited calls to other Libon users, landlines and mobile phones in 30 countries.
- Corbett said that the Libon pricing is “generating a very significant margin” for Orange/Sosh.
- Libon added the unlimited calling capability to its application in Sept. 2012. Within a month, the Sosh customers’ use of services such as Skype, Facetime and Viber had declined, and by November there was a significant reduction in the use of these services (see slide 13 of Corbett’s presentation).
- According to Corbett, Sosh users are shifting their usage away from Viber, Skype, etc. and back to Orange/Sosh, via Libon: “We have completely re-intermediated the company.”
- While the volume of international outbound PSTN minutes have not changed, international outbound VoIP calls are now about 100 minutes per user per month – this is new usage for Orange/Sosh.
- Inbound PSTN use has also increased 20%. People are dialing out using Libon and their normal phone number, and people receiving the call are either taking the call or calling back.
- Sosh users’ SMS traffic is more than 100 messages a day per user: “Users, if you give them the right tools, invent volumes of use not seen before.”
- Libon users are only “in the hundreds of thousands, but they are incredibly intense users”. My intelligence is that the number of Libon users is in the very low hundreds of thousands.
- The other point that Corbett made is that, so far, there has been zero marketing of Libon by Orange/Sosh.
- Corbett/Orange Vallee has also been tasked with being in a position to actively promote Libon in six Orange markets by end-2013; he told me that he thinks this will be the case by Sep-2013.

Telefonica Tu Me/Tu Go
Telefonica has stated this week that it will shut down the Tu Me service as of September 8, 2013, with the intention of refocusing its efforts on the Tu Go service, which has been launched by O2 UK. Tu Me is/was an IP-based messaging and voice application, in a similar vein to Viber, Kakao Talk, Line, etc. As of June 2012, the service had about 250,000 active users. According to some media reports, active users had increased to about 600,000 by August 2012.

The Tu Go application had between 50,000-100,000 downloads on Google Play in the past 30 days.

T-Mobile USA Bobsled Calling/Bobsled Messenger
The most recent data that I have for T-Mobile USA’s Bobsled Calling/Bobsled Messenger is that, in May 2012 (about one year after launch in April 2011), the service had 1 million users, which between them had made 10 million calls. By July 2012, the number of users had doubled to 2 million. I do not have more recent data.

AT&T Messages
AT&T has not publicly released any data about the impact of the Messages service on ARPU, postpaid subscriptions and churn. It has had between 1 million to 5 million downloads in the past 30 days on Google Play. It was launched in beta in Sep-11.

Verizon Messages
As yet, Verizon has also not publicly released any data about the impact of Verizon Messages on ARPU, postpaid subscriptions or churn. It has had between 500,000 to 1 million downloads on Google Play in the past 30 days. Verizon Messages was launched in 1Q13.

For additional information, you may also wish to view the following content which is available on the Mobile Content & Apps IC and on the Operator IC; this content also contains further information about mobile operators’ launches of Joyn services, and the take-up of Joyn services so far:

- Webinar: OTT communication: Monetization opportunities for operators and OTT players
- VoIP and IP Messaging: Operator strategies to combat the threat from OTT players (revised and updated)
- A million users for SKT’s Joyn,T but “free” might not be enough to tempt subscribers away from KakaoTalk
CLIENT: Does Informa have anything to support, or refute, the view that online video is moving to app-based systems? Are people consuming more video (and games for that matter) via specific apps rather than YouTube, iPlayer etc?

INFORMA RESPONSE
Nick Thomas, Principal Analyst, TV and Digital Media, has a comment on the trend of apps vs. browser for video viewing:

The dichotomy between apps and YouTube is a false one – the distinction is between apps (optimized for a specific platform) and browser-based services. A provider like YouTube has massive traffic on both. We do believe, however, that the general upward trend in ownership of connected portable devices will further drive app usage, especially since apps are in many cases allowing users a better video experience on their mobile devices than having to go through a browser.

The most recent iPlayer data is helpful if we make the assumption that apps primarily equate to mobile/tablet consumption, versus browser-based access via a PC (although there are exceptions to this).

In July 2013, 31% of all requests on the BBC’s iPlayer came from mobile devices (16% from tablets, 15% from smartphones), or, in other words, they were from apps rather than the browser (a reasonable assumption, in our view.) In July 2012, only 17% of all requests were from mobile (8% for tablets, 9% for smartphones). This confirms the steady growth of app-based viewing, both because of the growing use of connected portable devices, but also because the app provides an optimized experience.

The BBC iPlayer data is interesting because, for the UK at least, it has been the service which both reflects emerging usage trends, and educates users about them. In territories without such a high-profile flagship video service (for long-form professional content), adoption may evolve differently, however.

Response continues…

CLIENT: Do you have any analysis which shows that “Fiber” is perceived as a separate brand by consumers? What competitive offers can an operator provide for fixed voice? Any operator examples/success stories?

INFORMA RESPONSE
Numerous operators are attempting to market fiber-based services as significantly different from copper broadband services (Verizon FIOS, UPC Fiber Power, etc.).

One interesting development is that a variety of operators have attempted to claim the term, even if their access networks are only partially based on fiber (e.g., incumbents and their fiber-to-the-cabinet/VDSL networks, cable operators and hybrid fiber-coaxial (HFC) networks. This has led to PR – and in some cases, legal battles – but we have not seen any evidence that these battles have negatively affected take-up or consumer perception in any meaningful way, especially given that FTTC and HFC networks are more than capable of supporting the kinds of broadband speeds the vast majority of consumers want.

As such, we suspect that “fiber” has become useful shorthand in a number of markets for next-generation/superfast broadband services, especially as operators ratchet up their advertised speeds in order to set them apart from conventional services.

We doubt, however, whether the majority of consumers know or care about the difference between a hybrid fiber network and a full fiber one (i.e., fiber-to-the-premises).

This is unlikely to change given that operators are increasingly adopting a “mixed economy” of networks (i.e., some FTTC, some FTTP, etc.) and advances in hybrid fiber technologies (e.g., VDSL vectoring, G.fast, DOCSIS 3.1, etc.). The most successful fixed-voice strategies tend to be limited to arbitrage and/or bundling. Many cable and alternative operators continue to grow their fixed-line telephony subscriber bases by bundling the service for free or at a discounted flat-rate with broadband and/or TV. A number of incumbents have also slowed declines in – and on rare occasions, grown – their fixed-telephony bases through bundling.

This trend is perhaps surprising given the ongoing fixed-to-mobile substitution of voice calls, but can be explained by: a) the requirement to take out line rental in many countries in order to access DSL service; and b) consumers’ love of a bargaining (i.e., their perception that a bundle with numerous items is a better deal). These trends have left little room for pricing innovation (i.e., how can you compete with free/unlimited?).

Response continues…
We have a request coming in from our Business Solutions team looking for any M2M materials pertaining to the security and surveillance sector. We are specifically looking for CCTV-related materials but if we have anything further from that, it would be good as well.

INFORMA RESPONSE

Applications for CCTV include fixed and mobile deployments for protection of property and assets, public safety (fixed locations and events) and homes. Cameras may be deployed indoors or outdoors, on fixed infrastructure, in vehicles, in permanent locations or temporary locations such as at a public event. Wearable devices such as Google Glass will be disruptive technologies in this space.

The customer base for CCTV is therefore very broad: small and large retail, warehouse/storage providers, construction companies, logistics fleet managers, transportation providers, specialist secure logistics providers (such as cash collection), public safety and emergency services, hospitals, events organizers and stadiums, public householders, etc. Any commercial business, public sector or non-commercial organization and private individual could potentially have a need to protect its assets or ensure the safety of employees and the public.

Demand in this market is driven by factors such as crime rates (and perception of crime), trends in insurance requirements and rates of urbanization. Current high-growth examples include the protection of rail and utility infrastructure to prevent metal theft.

MNOs and surveillance

Operators’ surveillance services typically include a package of connectivity and cameras with motion-triggered alarms and video recording, GPS asset tracking and remote access control (e.g., door swipe cards). For temporary, mobile or high-volume deployments, wireless offers obvious advantages. Competitors, especially in emerging markets, include fixed-radio equipment providers such as Alvarion and many others. These vendors provide low-cost, spectrum-efficient PMP/PTP links via their local VARs, typically to large infrastructure owners such as cities, utilities and transportation companies. Getting power to cameras in fixed outdoor locations can be a challenge. Radio link providers often provide IP cameras with Power over Ethernet. Professional Mobile Radio vendors (e.g., Tetra) also compete in this space and have the benefit of mobility.

Advantages to mobile network operators (MNOs) are the low costs and the way that the existing wide coverage plus femtocells can improve indoor coverage, for example in retail malls. Most alarms applications are very low bandwidth and so use 2G networks. Surveillance cameras can also be relatively low bandwidth due to advances in compression. Clusters of cameras in a single location will need dedicated backhaul and 3G capacity. Operators must balance the needs of their mobile consumers with those of CCTV, especially if they are permanently transmitting.

Video-based M2M applications need to use a 3G-only network. 3 UK provides its provisioning platform (Ericsson) to third-party M2M service providers, such as Stream. It claims the margin on one CCTV M2M connection is more than 50 times larger than the margin on a smart-meter connection.

Response continues…
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2014 Research Agenda

Smart network, smart operator
A new set of tools are emerging in the market, allowing operators to redefine their business model while maintaining value-chain position and integrity.

These tools are often borrowed from the IT domain and currently include software-defined networking (SDN), virtualization and APIs.

SDN will dramatically change the network world. It has the potential to transform the telecoms industry by improving the ability of carriers – both wired and wireless – to flexibly deliver bandwidth “on demand”.

Informa’s research in 2014 will seek to map the impact of the cloud-SDN revolution on infrastructure economics as well as the impact of commoditized IT platforms running network elements. We will also benchmark technology and vendor activities with SWOTs and scorecards.
**VOLTE – THE FUTURE OF MOBILE VOICE**

**KRYSTIN PAULIN**
**SENIOR ANALYST**

Mobile voice still represents that vast majority of global mobile service revenues but it is a commodity facing severe price pressure and increasing competition from OTT alternatives.

Voice over LTE is the mobile industry’s answer to this harsh strategic reality and 2014 will be its breakthrough year that will see it expand from a handful of early adopters in South Korea to a variety of carriers and markets worldwide.

VoLTE is a tremendous opportunity for operators to fundamentally transform voice services and defend today’s huge voice revenues, but it is also proving a huge challenge to design, deploy and monetize.

Informa’s research in 2014 will address the key strategic challenges and opportunities in the emerging VoLTE market including business models, technology, deployment, devices and services.

**DE Delivering Better Video Experiences**

**DIMITRIS MAVRAKIS**
**PRINCIPAL ANALYST**

Mobile video has become a major driver for traffic in mobile networks, forcing operators to create mechanisms to optimize or even throttle third-party video services. This is especially the case for new LTE networks, where high speed and low latency are critical for its success in the market.

New technologies entering the market aim to improve the delivery of video, especially over LTE networks. Mobile-video optimization technologies continue to evolve while broadcast technologies can enhance video delivery. We are also seeing an increasing focus on managing service quality and delivering improved E2E SQM. CDNs and caching technologies also play a role.

Informa’s research in 2014 will explore the tools and strategies available to operators to enable them to deliver better video experiences and the potential benefits stemming from this.

**ENERGY EFFICIENCY**

**JULIAN BRIGHT**
**SENIOR ANALYST**

Telecoms operators are adopting greener and more sustainable approaches to energy use as part of the wider drive by industry to reduce carbon emissions and limit the consumption of scarce resources.

Networks account for a staggeringly high proportion of their energy needs. Techniques such as network resource optimization, self-organizing networks, decommissioning legacy, inefficient technologies and the use of alternative energy sources can all help to reduce power requirements.

Informa’s research in 2014 will focus on the growth of green networks, and when the ROI can be made for the transition to new technologies. We will employ written analysis to explore the options and potential benefits for operators, and to evaluate vendors’ response to the challenge through the development of more sustainable and energy-efficient networks.
THE FUTURE OF TELCO R&D
FRANCESCO RADICATI
SENIOR ANALYST

Research and development has, historically, sat at the heart of the telecoms operator’ business.

But in recent years the shift towards IP-based technologies has seen innovation shift away from telcos to Internet firms and start-ups headquartered on the US West Coast.

As a result, many operators have cut back on their R&D. Others are attempting to reposition and revitalize their R&D divisions; for example, by shifting them into newly-formed digital divisions, using them to incubate new businesses or becoming testing laboratories for third-party digital businesses.

This research looks at the different approaches being explored by telcos and whether these new initiatives can ensure a positive future for telco R&D.

CARRIER WI-FI – TAMING THE UNLICENSED BEAST
MIKE ROBERTS
PRINCIPAL ANALYST

With Wi-Fi now carrying some 75% of smartphone data traffic globally, and mobile networks the remaining 25%, carriers are racing to integrate Wi-Fi more deeply into their networks and businesses to improve the end-user experience and protect (or in some cases attack) mobile data revenues.

However, carrier Wi-Fi challenges abound. Most notably that end users want Wi-Fi everywhere but are increasingly unwilling to pay for it. That has led carriers to develop new tools and business models that generate revenues from elsewhere in the value chain, with mixed success.

Informa’s research in 2014 will track leading carriers and vendors as they work to “tame the unlicensed beast” by making Wi-Fi a more seamless and valuable part of their networks and services.
Wanted! Innovation and growth strategies

2014 Research Agenda
Many telcos have set up dedicated digital business units over the last two years while others have chosen to spread digital services and innovation more evenly across their organizations.

Informa has already published nine in-depth digital-operator profiles and in 2014 we will add a number of new ones from Asia, Latin America, the Middle East and Africa. They will explore – in depth – how telcos have gone about organizing their digital activities, which sectors they are prioritizing, who they are partnering with and the impact of digital services on their total revenues.

Part of this research program will include a digital scorecard where we map the operators’ strengths and weaknesses across a whole range of digital services.

Telecoms operators are building large partner networks across their businesses as they look to enter new markets and learn to accept that there is a limit to their own skills and competencies.

Informa has developed a number of products, including trackers and digital profiles, that detail partnerships from a service, technology and operator perspective.

In 2014, we will pull together a number of different trends looking across the 1,000+ operator partnerships that we have identified. These will highlight where operators have been most and least active, how partnership business models vary and where the best opportunities lie for new partnership segments and business models.

How serious and how effective are operators in targeting vertical market opportunities?

Informa’s in-depth tracking of leading operators’ activities in industries such as healthcare, utilities and transportation provides a rational assessment of revenue diversification success.

Benchmarks of the top 30 operators in specific verticals are provided, combining a dataset and accompanying analysis of customer wins, partnerships and value propositions.
DIGITAL SERVICES: SHOW ME THE MONEY!

MARK NEWMAN  
CHIEF RESEARCH OFFICER

For all the excitement about the potential of new digital services, such as cloud computing, M2M or mobile payments, there are very few examples of operators which have developed successful digital-service business models.

Through our research into telcos’ digital service strategies, Informa has managed to build a picture of the current size and potential of these different service categories.

In 2014, Informa will bring together this data and assess the importance of digital-service revenues in the context of the broader traditional telecoms market. It will seek out the examples of operators with the most successful digital-service businesses and assess the extent to which these can be replicated by operators in other markets.

SMALL IS BEAUTIFUL: FOCUSING ON SOHOS AND SMES

CAMILLE MENDEL  
PRINCIPAL ANALYST

Whatever the country, wherever in the world, the small enterprise is viewed as a key driver of economic growth and entrepreneurship.

Importantly for service providers, small enterprises have growing ICT needs and brand trust in telcos.

Industrializing value propositions for small enterprises is a key priority – but one size does not fit all.

Based on extensive primary research, Informa identifies the key mass verticals among small enterprises – and how to sell to them effectively.

WHOLESALE 2.0

NISHI VERMA NANGIA  
SENIOR ANALYST

Rather than providing new digital services directly to end users, telcos are coming to realize that they may be able to play a more valuable role by enabling third-party service providers. These could be, for example, OTT players or vertically-focused M2M service providers.

To address such opportunities, telcos are beginning to explore the extent to which they can exploit the capabilities that already exist within their wholesale departments. The big challenge is how to develop new business models that are very different from the traditional telco-to-telco wholesale model.

In 2014, Informa will explore which wholesale technologies and business models can support these new digital services.
SIZING THE CARRIER-BILLING OPPORTUNITY

NIDHIR MAUDGALYA
PRINCIPAL FORECASTER

Outside the iOS walled garden, the likes of Google, Samsung, Microsoft, Mozilla, Opera, Nokia and BlackBerry have all turned to carrier billing to enable purchases in their respective mobile app and digital content ecosystems.

A growing number of operators are bending to OTT app store demands by introducing direct billing and levying a far lower revenue share. For the operators, billing is the most tangible opportunity they have left to retain a place in the mobile apps value chain following the app-store revolution that has swept aside carrier-branded services.

In 2014, we will be sizing the carrier-billing market and estimating its growth potential over the next five years, as well as assessing potential threats from alternatives such as mobile-money wallets and street slot-machines that turn cash into digital money.

PAYMENTS IN THE CLOUD

SHAILENDRA PANDEY
SENIOR ANALYST

Mobile payments in “bricks-and-mortar” stores have long been seen as synonymous with NFC and handset-based authentication. Such an approach gives operators the opportunity to hoist themselves on the payments value chain by authenticating payments via SIM cards – the only handset real estate over which they still have control.

But, over the past couple of years, retailers such as Starbucks and online players such as PayPal have been experimenting with cloud-based ways of enabling in-store payments via mobile devices. They promise a much more transformative shopping experience than NFC.

We will look at the cloud-based alternatives to mobile NFC payments that are emerging and assess which of the competing approaches have the strongest chance of long-term success.

AUTOMOTIVE OEMS

JAMIE MOSS
SENIOR ANALYST

Fleet & asset tracking has been a bread and butter M2M service since the 1990s. Now government mandates for stolen vehicle recovery and emergency crash notification, combined with lofty auto-OEM aspirations for connected infotainment, is inexorably pushing embedded in-vehicle connectivity to the everyday driver.

Automotive is the most dynamic sector of today’s M2M industry. Building on existing primary statistical research and scorecards, this research program profiles key auto-OEMs via a series of case studies examining their connectivity, business model and service provision strategies.

Where is the true value for them and is there anything for wireless carriers beyond the mobile broadband data powering in-car Wi-Fi hotspots?
Smartphones and high-speed broadband are out of the reach of more than half the world’s population. But this does not necessarily mean that they cannot get access to Internet services.

Operators in emerging markets are experimenting with a number of different “2G” solutions for delivering Internet services such as SMS, USSD and Bluetooth.

In the meantime, initiatives including internet.org, Google’s Project Loon, Microsoft 4Africa, white space Wi-Fi and satellite connectivity share the goal of bringing down the cost of access to Internet services.

In 2014, we will look at the strengths, weaknesses and market potential of these different solutions and some of the innovative new companies that are behind them.

MVNO markets have been growing for a number of years and are expected to continue to do so. While the US and Europe continue to represent the most important poles for MVNO activities, some Asian markets, most importantly China, are now embracing the “alternative business model”. In Latin America, Colombia and, shortly, Mexico, are leading the way.

Informa will continue to market-size MVNOs and forecast their activities in 70 markets around the world. Superstars and mega failures will continue to provide material for case studies and teach the “do” and “don’t do” lessons in the MVNO space.

We will also track the progress of new OEM MVNOs, fashion brands and, potentially, new players from the OTT world.

While the telecoms operators’ main focus for big data involves feeding information back into CEM and loyalty programs, there is another, directly monetizable, opportunity.

Information about where mobile users are using their phones, at what time of day and for how long has real value to companies in a whole range of different industries. These include retail firms, entertainment companies and other B2C product and service providers.

Informa will look at examples of companies that have bought this data from operators, how they use it and where new opportunities lie in new markets and sectors.
The traditional wholesale-centric roaming market is in full evolution as a result of regulation, technology innovation and the switch into data-centric retail price plans.

While Europe is in the process of eliminating roaming charges altogether, regulators are pursuing similar initiatives in other regions. The focus – and profitability – of roaming is gradually shifting from wholesale to retail.

In the meantime, Wi-Fi and “multi-IMSI” solutions are eroding operators’ roaming revenues even further.

In 2014, we will update our roaming forecasts and market outlook. We will also look at new roaming opportunities in Wi-Fi and connected devices such as laptops and tablets.

Build it and they will come? LTE is the fastest-growing mobile technology that the world has ever seen, but its full potential has yet to be realized.

New opportunities for LTE involve a move away from generic horizontal services. They will require the targeting of discrete verticals such as public safety, healthcare and oil and gas.

The common theme across industries is a need for real-time intelligence, often delivered as a mobile video stream or 3D image.

Our research focuses on targeting and partnering strategies to maximize LTE’s potential.

In the past three years, telecoms operators have started building 800,000 square meters of data center space to capture cloud revenue opportunities.

Informa’s market-leading telecom cloud research stream continues to track, assess and advise on the right path for telcos to monetize cloud services – whether it be IaaS, PaaS, SaaS or other emerging service opportunities.

Focus areas include enterprise cloud applications; opportunities in the wholesale cloud and cloud enablement partnership strategies, backed with case studies of operator best practice.
Value shifts, value creation and value destruction
THE BIG PICTURE: VALUE CREATION OR DESTRUCTION?

MILENA COOPER
FINANCIAL ANALYST

Over the last five years, the telecoms and digital media industry has changed dramatically as value has shifted away from traditional communications to new services and devices.

Informa is now embarking on a major new research program that seeks to map and quantify these changes. In some cases, value is being created, in other cases, it has shifted – but there will also be examples of value that is destroyed.

This first phase of research will quantify and analyze the size of the total industry value chain by sector. It will answer the following questions:

- Where has value been created and lost?
- Which are the most successful segments and why?
- Has overall value in the system increased and how has this compared with other economic growth factors?

THE NEXT FIVE YEARS: SCENARIO-BASED ANALYSIS

GARETH SIMS
HEAD OF FORECASTING

The second part of our value-chain analysis is forward-looking and will be based on a number of different potential scenarios for the evolution of the telecoms and media industry.

Such scenarios could include the rapid shift of a large proportion of services and applications into the cloud or the failure of telecoms operators to develop compelling new voice and messaging services.

Our research will explore where most value will be created and why and what the implications will be for different types of companies across the value chain – telecoms operators, infrastructure vendors, handset OEMs and traditional and digital media firms.
Intelligent pricing and bundling
MOBILE BROADBAND PRICING EVOLUTION

DARIO TALMESIO
PRINCIPAL ANALYST

The gradual transition to data-centric pricing is inevitable but if operators move too quickly they risk losing some pricing levers and causing self-inflicted ARPU dilution.

In 2014, we will continue to advise operators by providing thought leadership, vision, market data and case studies of best practice and worst practice in pricing mobile data.

Overall, although we feel that operators need to be realistic in their expectations (accepting the limitations of their own IT systems), we believe that there is more to be done in both emerging and mature markets.

Ultimately the industry needs to move towards customer-centric prices rather than data-centric ones if the players want to implement effective data monetization strategies.

ANALYSIS
MARKET DATA
CASE STUDIES

PRICING STRATEGIES AND BEST PRACTICE FOR FIXED AND MOBILE SERVICE BUNDLING

TONY BROWN
SENIOR ANALYST

In mature markets, bundling has gained serious momentum. While quad-play has been around for some time, we will see more assertive propositions, especially from European incumbents, in 2014.

Historically, operators’ primary goal in introducing quad-play has been to reduce churn, particularly in the mobile customer base, and thereby reduce subscriber acquisition and retention costs. We will produce case studies of operators successfully deploying quad-play strategies.

We will also look at how operators can avoid heavily discounting the individual components of a bundle and thereby destroying overall value.

We will produce case studies, analysis and a set of guiding principles on how to create the perfect multiplay strategy.

ANALYSIS
CASE STUDIES

CAN SHARED DATA PLANS BE SUCCESSFUL OUTSIDE THE US?

ARI LOPES
PRINCIPAL ANALYST

While US operators are consistently pushing ahead with family-shared, corporate-shared and multidevice shared plans, the rest of the world is only just starting to dip its toes into this pricing concept.

In 2014, Europe will see a proliferation of “shared plans” but with more of an emphasis on multidevice service plans for individuals rather than family plans.

We will produce case studies and analyze the different offering models – and also track the successful examples of shared plans.

ANALYSIS
CASE STUDIES
Informa believes 21st Century Fox president Chase Carey was on the money when he declared at the company’s first investor day in August that “Consumers actually want the bundle; they just want a different bundle”.

While there are plenty of faults with today’s pay-TV packages, consumers love the convenience and simplicity of bundled content at a flat-rate price. New devices, OTT delivery and cloud-TV features promise to enable service providers to assemble packages that can not only help keep customers, but increase ARPU and attract new market segments which have historically not paid for TV.

Informa’s research in 2014 will focus on identifying and analyzing the most disruptive and successful TV pricing and marketing strategies from the TV, telco and OTT worlds, via a series of trackers, case studies and overarching reports.

Whereas mobile operators in the developed markets have been more focused on managing the explosion of data traffic, emerging market operators face the challenge of how to get their customers to become regular consumers of mobile data.

Strategies can include zero-rating some content and websites – for example Wikipedia or Facebook. We also expect to see operators extending some of their successful zonal-based pricing concepts for voice services into data.

We expect to find great examples of innovation and data monetization in 2014 across high growth markets in Latin America, Africa and Asia.
Customer first
With competition coming from not only other operators but also OTT companies, telcos need to provide a best-in-class service to their customers.

Customer experience management should be at the heart of operators’ strategy as it will help them to develop a holistic customer view across all the different parts of the organization.

Informa’s 2014 research will provide examples of how operators are using CEM as a way to improve their customer focus. It will also explore the different initiatives from various divisions within the organization, from network and IT to customer care.

“Big data” provides telcos with an opportunity to improve their operational efficiency and deliver a better quality of service. A powerful analytical engine gives them an unprecedented opportunity to understand customer demands and pitfalls in real time.

As such, big data puts operators in a unique position to meet their customers’ expectations by offering a best-in-class customer experience, from the network to other customer channels (retail, call center and Web portal).

Informa 2014’s research will assess operators’ initiatives on how to use big data to improve their services and customer experience. It will also examine the different big data propositions offered by different vendors and how they can benefit operators.

More and more operators are deploying new ways to interact with their customers. From improving call-center capabilities to investing in new smartphone self-care applications, operators are trying to engage better and more often with their clients.

Operators now have the challenge of not only providing a seamless experience across all these channels, but also making sure they offer the right channel experience for all the different customer segments and functions.

In 2014, Informa will produce a series of case studies on how operators are managing the customer experience across all these different channels. It will also tackle operators’ initiatives on smartphone self-care applications and how these applications will evolve to enhance the customer experience.
LOYALTY – FROM RETAINING TO DELIGHTING CUSTOMERS

Operators need to invest in building long-term relationships with their customers in order to improve their long-term profitability.

Loyalty strategies are evolving, but there is plenty more to be done to really engage with the customers throughout their entire “customer lifetime”.

Segmentation and more relevant approaches are required to make customers more willing to stay with operators for longer periods.

Informa 2014’s research will look at the different aspects and components of loyalty strategies such as premium customers, prepaid strategies and innovative loyalty programs involving concepts such as gamification and contextual rewards.

MYSTERY SHOPPER – EXPOSING THE RETAIL EXPERIENCE

The “mystery shopper” is a research program providing a snapshot of real-life “bricks-and-mortar” retail experiences conducted across a number of cities and countries globally.

Primary research is collected from a series of in-store visits across various outlets, including mobile operator and third-party stores, from a variety of regions at a specified point in time.

The main focus of the research is on the handset retail experience. This involves analyzing how handsets and tablets are positioned in-store through promotional displays and also by sales assistants.

This research is complemented by discovering which handsets are most recommended in-store, and a scoring mechanism of the sales assistants’ expertise according to their knowledge of the devices.

EFFECTIVE SEGMENTATION FOR A POST-PC WORLD

In the post-PC world, connected devices, objects and networked applications outnumber humans.

Within the enterprise, these tools provide new ways for humans to interact with co-workers, clients and partners – and to create business intelligence.

But as value moves from providing connectivity to supporting interaction, service providers need new ways to dimension and segment enterprise needs.

This requires a deeper understanding of business processes, which can now be improved and de-materialized. To help service providers, Informa has developed a new framework to triage and segment enterprise service opportunities.
2014 Research Agenda

Swimming with sharks: Life in the OTT lane
WEBCRTC: TELCO FRIEND OR FOE?  
MIKE ROBERTS PRINCIPAL ANALYST  

WebRTC has developed at Internet speed and will explode onto the scene in 2014 with such force that the vast majority of telcos and vendors worldwide will have to factor it into their strategies and roadmaps if they haven’t done so already.

What happens when real-time communications is built into the Web itself, and browsers on billions of smartphones, tablets and PCs start delivering the type of voice and video services that used to be the preserve of communications service providers and, more recently, OTT players?

The answer is significant disruption for all communications players including CSPs, OTTs and their vendors. Informa’s research in 2014 will chart the rise of WebRTC and its growing impact on the global telecoms and Internet markets.

MOBILE MONEY: BEYOND PAYMENTS  
GUILLERMO ESCOFET SENIOR ANALYST  

Mobile money has become ubiquitous in many parts of the developing world, especially Africa. But beyond remittances, payments and mobile top-ups geared at consumers, mobile money also has the opportunity to become a transformative tool for enterprises and other organizations such as the public sector.

At the same time, the hasty rollout of mobile-money services has left holes to plug around issues such as revenue assurance and fraud prevention. Also, most mobile-money services currently operate as closed loops, limiting their monetization potential.

We shall be exploring the different options that exist for interconnecting mobile-money services, as well as solutions to make these services more leak-proof and robust and extend their reach into enterprise sectors such as m-government.

TRACKING THE OTT AND IP COMMUNICATIONS REVOLUTION  
PAMELA CLARK-DICKSON SENIOR ANALYST  

We are witnessing an explosion of mobile-centric OTT voice and OTT messaging services, all looking to repeat the success of services such as WhatsApp, which recently hit 350 million users per month.

Most of these services are developed by start-ups but we are also seeing telcos and OEMs attempting to gain a share of the global market.

Informa Telecoms & Media is building an OTT Communications Tracker service which provides a detailed analysis of the services provided by all OTT providers globally. It also plots the growth in the use of OTT communications services in terms of usage, messages and revenues.

The data is available in a single easy-to-use spreadsheet and a quarterly PowerPoint update.
MOBILE APPS: THE GLOBAL PICTURE

JAMIE MOSS
SENIOR ANALYST

Mobile apps are the biggest success story, yet also the biggest smokescreen in the telecoms industry. We all love them, none of us can do without them, yet very few parties benefit financially from them. Only a handful of developers make a living, while the greatest benefactors are those selling the hardware for which apps act as differentiators.

The age of the mobile applications store has created a world where our default expectation is that software should be free. Consequently, the level of functionality and daily utility that is required to compel a consumer to part with as little as a one dollar annual subscription fee is huge.

This report makes a definitive statement about mobile apps, for all major stores: their size, user-base, downloads, revenues and traffic generated.

OPENNESS AND APIs

GUILLERMO ESCOFET
SENIOR ANALYST

Telcos have believed for some time now that they need to open up their network APIs if they are to play a role in future digital ecosystems. A number of them have established API programs as part of a bid to work with developer communities.

But the business case or rationale for doing so remains unclear. And some of the early protagonists have now either shut down or radically overhauled their API programs.

This research will look at where telcos need to go next in terms of developing their API programs. It will assess where there may be opportunities for monetization and what other broader benefits an open API program can deliver both to telcos and to their customers.

ANALYSIS
MARKET DATA
FORECASTS
Future television
In world of increasing choice, as the number of viewing options increases, broadcasters and content providers face a significant challenge in making sure that their content can be found by an audience.

Internet companies such as Google and Netflix, and retailers such as Amazon, which are now entering the TV space, have great experience in delivering suggestions and recommendations, while social media has boosted the power of peer recommendations. What can operators and service providers do to compete and deliver valuable recommendations to their customers?

Informa’s research in 2014 will focus on new developments in the market and will include case studies of best practice from adjacent industries where appropriate, including mobile and retail, in order to provide insight into how companies can best meet consumers’ needs – and get maximum value from expensive content assets.

**HOME-ENTERTAINMENT ECOSYSTEMS**

As consumers embrace more and more options for acquiring their entertainment both at home and on the go, media firms, service providers and equipment manufacturers need to face up to the challenges of new behaviors, new business models and new competitors/partners.

Key opportunities will include the shift to Cloud-TV services, low-cost streaming devices and the launch of new game consoles from Sony and Microsoft.

Informa’s research in 2014 will help our clients grappling with these value chains from a number of angles:

- A quarterly home entertainment tracker will report and analyze key market developments,
- Case studies on “digital disrupter” firms will highlight technology and business innovations
- Analysis of the key segments that drive the market – gaming, audio and TV.

**TELCO TV 2.0**

Few telcos have achieved the kind of success they desired with IPTV, but the challenges that drove them to enter the TV market have not changed.

Fiber-to-the-x networks are costing billions of dollars to roll out, yet superfast broadband services alone will only generate marginal increases in ARPU. All the while, cable operators continue to make faster progress with their superfast broadband and TV bundles, while Internet firms threaten to take the lion’s share of demand for new kinds of TV service.

Informa believes telcos should disrupt the TV market by harnessing the potential of new smart devices, OTT delivery and cloud TV infrastructure strategies.

Our research in 2014 will focus on identifying and analyzing the most successful telco TV strategies via a series of trackers, case studies and overarching reports.
TV AND BIG DATA

TED HALL
SENIOR ANALYST

The TV industry – along with the rest of the media industry – likes the idea of big data and most players are now able to generate significant amounts of it.

But few have the ability to gather, mine and analyze big data effectively to create meaningful insights. Amid the big data, how can broadcasters, advertisers and operators find the small data that actually matters?

Informa’s research in 2014 will focus on new developments in the use of data by TV and media companies and will include case studies of best practice from across the industry. This will also dovetail with our research around content discovery and recommendation, and evolving digital advertising.

ANALYSIS
CASE STUDIES

Evolving Digital Advertising

NICK THOMAS
PRINCIPAL ANALYST

While consumers increasingly embrace digital media, for some types of content, advertisers are still reluctant to follow those consumers’ eyeballs and are allocating their budgets to traditional media. Yet until the advertising dollars migrate to digital, the promise of the digital media future will remain unfulfilled.

What can the various stakeholders – content owners, publishers, broadcasters, platform owners and advertising agencies – do to accelerate the adoption of digital advertising in 2014?

Informa’s research will focus on the growth of digital media advertising across different categories to identify best practice.

We will address the challenges of measurement and also look at the remaining obstacles to creating the kind of relevant personalized digital advertising that remains the holy grail of the industry.

ANALYSIS
A world of connected devices
The “Internet of Things” – such a bold and evocative, yet hard-to-define concept. So many devices could potentially benefit from “talking” to the Internet, and to each other, via radio connectivity.

Consumer electronics excites the world of M2M because of its scale, as Moore’s Law and MIPS-driven goods continue to create unprecedented levels of consumption. US$ 1.1 trillion’s worth of CE will have been sold globally in 2013, according to the Consumer Electronics Association.

Imagine if just a portion of that was connected… now imagine if it all was! This report provides case studies identifying the connectivity strategies, business models and technology choices of major CE players, comparing the cost of embedding different technologies into new M2M/IoT devices.

The success of Apple and Samsung in controlling the high-end mobile device value chain is having a knock-on effect on the other leading OEMs.

Meanwhile, Internet giants like Google, Amazon and Facebook are also pursuing strategies to verticalize the functions that will help them maintain growth and create new market opportunities.

In the mass market, some chipset makers, notably MediaTek and Qualcomm, are helping less well-known brands to de-verticalize and reduce their spending on R&D. This allows them to focus on industrial differentiation and dedicate more attention to the commercialization of their devices.

Our research will assess whether this trend towards de-verticalization will be enough to enable the emergence of new players to challenge the established device vendors.

The ability to pack evermore features and functionalities into a mobile phone is slowing as most main technologies have now been integrated.

The current points of differentiation on a handset are mainly based on the magnitude of a technology – the number of megapixels in a camera; the size of the screen and its resolution quality; or the number of application processors and speed.

In an effort to improve on these differentiation points, there is another “rung” of technologies that is being explored by companies in the devices value chain.

In 2014, we will be assessing the impact of new technologies including: the use of flexi-screens; heterogeneous computing; augmented reality; and advanced recognition technologies, such as gesture and voice control.
WEARABLE ELECTRONICS
DAVID MCQUEEN
PRINCIPAL ANALYST

With most platform owners, operating systems and vendors behind the concept, there are many indications that wearable electronics will be the next smart-technology revolution. With the requisite number of “hubs” (e.g., smartphones) and bearer technologies, specifically Bluetooth Low Energy, now available, there is enough momentum to create a viable marketplace.

It is not only the possibility of additional hardware that is enticing, where a number of features and functionalities are extracted from the smartphone into peripheral accessories – it is also the opportunity beyond that for an explosion of related applications and services.

WEB-BASED OS AND CONSUMER CLOUD
MALIK SAADI
PRINCIPAL ANALYST

While Apple and Android devices have proved incredibly popular, they remain out of reach for most people in emerging markets.

Backed by a number of major operating groups, it is here that Web-based operating systems, such as Mozilla’s Firefox OS, represent the biggest potential market. Underpinned by open HTML5 technology, these Web-based OSs allow for the provision of lower-cost devices.

With the potential promise of both applications and storage held on the Internet and in the cloud, the argument for low-cost, “dumb” phones being able to access data services, rather than just the expensive smartphones, becomes a more viable proposition.
OUR ANALYSTS ARE SPREAD ACROSS 5 CONTINENTS AND 13 RESEARCH OFFICES. THEY ARE INFORMED, OBJECTIVE AND READY TO APPLY PRACTICAL ‘REAL WORLD’ EXPERTISE TO YOUR BUSINESS CHALLENGES AND OPPORTUNITIES.
Apple Sales Soar In India
May 30, 2013
Smartphone subscription rates in India are up 52% year over year, more than any other country except Taiwan, according to Informa.

U.S. Pay-TV Subscriber Numbers Up for 2012, Fourth Quarter
March 6, 2013
Meanwhile, a recent report about Western European pay-TV trends highlighted that the region saw its first-ever subscriber decline in 2012. In the report, which could kick off a cord-cutting debate in Europe, research firm Informa cited more than 380,000 pay-TV customer losses in Western Europe, with a UK gain unable to offset big drops in Spain and Italy.

Facebook Bolstering Efforts to Address Hate Speech
May 29, 2013
“This should be a big concern for Facebook,” said Shailendra Pandey, an advertising analyst at Informa Telecoms & Media in London. The companies pulling advertising “are big brands and they bring in a lot of revenue each quarter.” Advertisers that suspend campaigns with Facebook will return when the matter is resolved because it’s an important medium for the industry,” said Pandey.

Will Telecom Italia Get Expansion Approval?
July 9, 2013
Francesco Radicati, research analyst at Informa Telecoms & Media, discusses Telcom Italia ahead of the watchdog’s decision on the company’s spinoff plan and whether it would create a “competitive imbalance.”

Thin wire could strip Telstra of high speeds
September 24, 2013
“The diameter of the copper is important,” said Informa telecommunications analyst Tony Brown. “This is not an exact science, as there are so many variables in it, but if you lower the diameter of the copper you lose about 15 per cent of the speed.”

Screen design and smartphone subscription rates
October 7, 2013
I think LG is doing this to show it is innovative, to do something different and to stand out from the rest of the bar-style screen devices that we have at the moment,” said David McQueen, a mobile device expert at tech consultants Informa. “But I don’t think consumers are going to be that interested by a slightly curved design. However, we do think there will be interest if flexible screens are used to offer different form factors. For example a device that you snap round your wrist or a traditionally-shaped smartphone whose screen wraps around the sides onto a bit of the back so that the edges become touch-screen rather than hard buttons.

Ted Hall, senior analyst with Informa Telecoms & Media, believes that the threat Netflix provides to set-top boxes extends beyond the networks to the pay-TV providers themselves. “The danger for Virgin Media is that its customers will find Netflix to be a revelation that they would not otherwise have stumbled upon, opening their eyes to a low-cost subscription TV service that satisfies their core entertainment needs,” he said. “Rather than strengthening the appeal of TiVo, the addition of Netflix could in fact do the opposite and encourage customers to cut the cord and settle for a cheaper combination of broadband, Netflix (via other devices) and free-to-air TV.”

Netflix Stock Boom May Bring Gloom to Hollywood
September 10, 2013
Ted Hall, senior analyst with Informa Telecoms & Media, believes that the threat Netflix provides to set-top boxes extends beyond the networks to the pay-TV providers themselves. “The danger for Virgin Media is that its customers will find Netflix to be a revelation that they would not otherwise have stumbled upon, opening their eyes to a low-cost subscription TV service that satisfies their core entertainment needs,” he said. “Rather than strengthening the appeal of TiVo, the addition of Netflix could in fact do the opposite and encourage customers to cut the cord and settle for a cheaper combination of broadband, Netflix (via other devices) and free-to-air TV.”

Europe mobile: Vodafone’s deep pockets could influence rivals
September 19, 2013
It’s reported that Vodafone is poised to spend a lot of money in Italy, said Informa consultant Francesco Radicati. One acquisition target his organization has mentioned is Fastweb. With its fixed assets, and partnership with Sky TV, it’s the “best bet for triple-play”. Vodafone could offer in Italy, he said. Another good target for Project Spring would be Spain, said Radicati. There’s already a deal with Orange Spain to roll out a fiber network to cover 6 million buildings in 50 cites. Informa believes buying a cable player like broadband communication and entertainment company ONO would give Vodafone more subscribers and better access to the TV market, he said.

LG announces curved screen phones to launch in 2014
October 7, 2013
I think LG is doing this to show it is innovative, to do something different and to stand out from the rest of the bar-style screen devices that we have at the moment,” said David McQueen, a mobile device expert at tech consultants Informa. “But I don’t think consumers are going to be that interested by a slightly curved design. However, we do think there will be interest if flexible screens are used to offer different form factors. For example a device that you snap round your wrist or a traditionally-shaped smartphone whose screen wraps around the sides onto a bit of the back so that the edges become touch-screen rather than hard buttons.

At revamped Etisalat, acquisitions regain traction
August 5, 2013
“There has been quite a lot of changes at Etisalat over the past couple of years to equip the company to cope better with the challenges of being a large international organization,” said Matthew Reed, a senior analyst at Informa in Dubai.

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A recent study by industry analysts Informa indicated that, by the end of 2013, OTT messaging traffic would be twice that of traditional SMS texts, topping out at around 41 billion messages sent every day (compared with 19.5 billion sent via SMS). However, despite this catalog of impressive statistics, OTT messaging will not be pushing out SMS services anytime soon. Informa analyst Pamela Clark-Dickinson even predicts that SMS revenue will continue to increase through to 2016, partly because the insularity of OTT messaging communities means that “users typically use SMS when communicating with non-OTT users” but also because “SMS is starting to hit its stride in the enterprise mobile messaging market.”

THE WALL STREET JOURNAL

Substantial Growth Potential for Pay-TV operator
OSN, Says Arqaam
September 15, 2013

“there are hundreds of free-to-air channels and there are lots of state-backed broadcasters that do not necessarily have to operate on a commercial basis,” says Matthew Reed, an analyst at Informa Telecoms and Media. “This makes it a quite difficult TV market in many ways.” Moreover, Internet TV providers and video content sites such as YouTube are also knocking at the door of consumers. Informa forecasts a pay-TV penetration in the region of 13% in 2017, up just three percentage points from 10% last year.

THE GUARDIAN

How Twitter became a beating pulse of global news
September 13, 2013

“It has become phenomenally integrated into our culture in a way that very few Internet companies are,” said Nick Thomas, a digital media analyst at Informa Telecoms & Media. “It has grown way beyond its techy roots to become part of the fabric of life for hundreds of millions of consumers worldwide. This is a platform where you’ve got Stephen Fry and Justin Bieber, and then an acceleration of news, so there’s a diversity that is its strength.” Such an unfettered platform will bring its own challenges as a public company, Thomas said, as Twitter will have to resolve its commitment to being an open platform with renewed pressure from advertisers and shareholders to clean up the more “unhygienic” aspects of the site.

The National

OSN goes international with UK launch of TV channel Ya Hala
August 21, 2013

OSN launching outside its domestic market with an impending IPO suggests the company is showing that it has future plans for expansion outside the home market, which will be a positive thing in terms of market positioning and potential future investors,” said Michael Dean, a research analyst at Informa Telecoms and Media. “We are seeing a trend of Arabic media interest in looking to expand outside their home markets and raise their profile on a global level, such as Al Jazeera having just launched a new channel in the US. “Additionally across the Middle East, OSN is a known proprietor of quality Western content in terms of movies and TV series so it is interesting to see it coming to the UK to promote niche Arabic content.”

The Telegraph

Apple iPhone 5S and 5C: fingerprint sensor and plastic make iPhone 5 debut
September 10, 2013

Malkit Soadi, of analysts Informa, said the new devices were “mainly addressed at new audiences with the aim of extending the market opportunities of the iPhone beyond the high-end segment of the market”. He added, however, that Apple had much to prove with the new devices, as its appeal has come under pressure in important new markets, despite a slight recovery in Western market share. “The timing of this launch is crucial as the industry is getting close to the end of the third financial quarter and the iPhone’s performance during this period has been largely below expectations, particularly in China where the growth rate is falling rapidly,” he said. “It is becoming obvious that Apple can no longer afford to address the whole world as a single market for its iPhone.”

The New York Times

Digital Music, the African Way
March 24, 2013

“I think there’s a feeling of ‘Let’s give it a try’, where before everyone was saying, ‘I’m just going to sit on my ball and refuse to play,’” said Simon Dyson, an analyst at Informa, a research company in London. “Informa estimates that 70% of the African music business consists of local repertoire, with international artists, who dominate elsewhere, representing only a minority of what people are listening to. That presents an additional challenge for the major record labels and digital services based outside the region, which tend to generate the bulk of their sales from a handful of hits.”

FINANCIAL TIMES

Rapid rise of chat apps slims texting cash cow for mobile groups
April 29, 2013

The data, collected for the Financial Times by telecoms and media consultancy Informa, highlights the rapid rise of a technology that did not exist five years ago but is seen by some as a potential challenger to Facebook’s dominance in social networking. Pamela Clark-Dickson, senior analyst at Informa, said internet messaging was increasingly used as a substitute for SMS in a number of markets.

BLOOMBERG TELEVISION

What’s Vodafone’s Next Move After Verizon Deal?
September 3, 2013

Dario Talmesio, Principal Analyst at Informa Telecoms & Media, discusses the deal with Anna Edwards on Bloomberg Televisions “Countdown.”

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THE AGE

‘There’s no crisis, my job is done and now I’m gone’
July 13, 2013

Tony Brown, senior analyst at Informa Telecoms and Media, questioned Mr Quigley’s assertion that the design and architecture of the NBN were complete, and predicted that the role of chief executive would be hard to fill. “To say that the foundations have been laid would be a stretch, to say the least,” he said. “The fiber network still only passes 1.7 per cent of the total homes and we still don’t know whether this is going to be a fiber-to-the-home or a fiber-to-the-node network.” Mr Brown said the NBN Co chief executive was an incredibly tough role. “You are squeezed between two political parties and the media. You would have to be very brave to take this role before the election without knowing who your bosses would be and what sort of the network you’d be rolling out.” He questioned whether any overseas executive with suitable experience would “be prepared to come down there and put up with the kind of stuff that Quigley has had to put up with.”
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