

Smart Cities: A Challenging but Attractive Opportunity for Network Operators

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‘Smart Cities: A Challenging but Attractive Opportunity for Network Operators,’ a Research Report, analyzes the smart city proposition for network operators worldwide and how they are addressing the opportunity. The report discusses the urbanization trends worldwide and provides an in-depth analysis of elements of smart city services, the stakeholders in smart city projects and effective operator approaches and business models built around five, detailed operator case studies (AT&T, KT, Deutsche Telekom, Telefonica and KPN) and reviews of developments in China and India.

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Key Findings

- At a fundamental level, the smart city is an important and attractive opportunity for network operators. Cities are the engines of economic growth, but with growing populations they face important challenges many of which can be addressed through ICT and digital technologies.
- By their nature, smart city projects are complex, long term and unique with many stakeholders and a variety of priorities and business models. There is also strong competition from global and local vendors.
- Smart city growth is often not continuous and network operators need to carefully consider potential growth across their footprint, combined with their positioning in the different markets where they are present.
- Network operators are well positioned for the growth of M2M and IoT, which are the basis for many smart city services such as transport related, surveillance/ security and smart metering. Partnerships



enable access to smart city expertise.

- Prior to allocating significant resources, operators need to both see a significant emphasis by governments on smart city investment and be sure they are positioned to take advantage.
- In most countries, however, there is no significant central government involvement, and city projects tend to move forward only when funding is made available locally, with only limited market potential.
- The most common approach is for operators to address various verticals that are attractive in themselves on a nationwide basis, but can also form part of a broader smart city project.
- Pyramid does not believe that the option of investing into dedicated smart city resources is viable for most operators, and rather recommends focusing on M2M and IoT services (and networks) which lowers risk and leaves smart city opportunities open.

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Synopsis

“Smart Cities: A Challenging but Attractive Opportunity for Network Operators,” a Research Report by Pyramid Research, analyzes the smart city proposition for network operators worldwide and how they are addressing the opportunity. The report discusses the urbanization trends worldwide and provides an in-depth analysis of elements of smart city services, the stakeholders in smart city projects and effective operator approaches and business models built around five, detailed operator case studies (AT&T, KT, Deutsche Telekom, Telefonica and KPN) and reviews of developments in China and India.

The report is organized as follows:

- Introduction _ Background and overview: This section looks at the key trends that form the context of smart city projects, highlighting the rise of megacities. A discussion of how to define a smart city is also included.
- Smart city scope, stakeholders and value chain: This section analyzes the elements of a smart city, city priorities and smart city stakeholders. It also presents the smart city value chain and provides a theory of a virtuous circle triggered by smart city projects.
- Analysis of operator approaches: This section reviews the various smart city opportunities available to operators and an examination of most effective operator approaches to smart city services.
- Case studies: This section includes five operator-specific case studies (AT&T, KT, Deutsche Telekom, Telefonica and KPN) analyzing a sample of smart city initiatives. It also includes two country-level case studies that analyze the smart city plans of the Chinese and Indian governments as well as operator initiatives in the two countries.

Reasons To Buy

- This Report provides a comprehensive examination of the smart city proposition for network operators, smart city projects, value chain and key stakeholders as well as effective operator strategies to help operators make informed decisions pertaining to investments in networks and technologies, develop key partnerships and optimize return on investment.
- This report compares smart city strategies and operator footprints and analyzes various smart city business models and approaches to help executives understand the growth opportunities and

challenges facing their companies in the emerging field of smart city services.

- The comparative analysis of smart city go-to-market approaches from five leading operators will help service providers to determine key considerations for assessing smart city projects and develop innovative, effective business models to maximize their opportunities.
- The report incorporates an easily digestible, executive-level assessment of smart city projects and the role of network operators worldwide built around insights directly from the market stakeholders, which enables decision makers to quickly get up to speed with the current and emerging trends and make informed business decisions.

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