



Global Telecoms Industry - Key Trends - OTT, M2M, Big Data and the Cloud

Telecoms -Market Demand, Growth, Opportunities and analysis of Top Key Player Forecast to 2021

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Description

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OTT, M2M, Big Data and the Cloud drive the Global Telecoms Industry The broader telecoms environment continues to be very challenging in 2014 and looking towards 2015 there still are many technological, economic and regulatory changes that the industry faces. The market is highly competitive and ruthless with those operating in the telecoms, mobile, broadband, digital media and ICT industries alike all scrambling to retain and build new revenue streams.

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Every day hundreds of thousands of new devices, as well as new people, are added to the telecommunications networks that span the globe and there is no indication whatsoever that the demand is going to slow down any time soon – we see it continuing for decades to come. Yet, at the same time, many telcos and ISPs are struggling to maintain their profitability.

This defies economic logic. Market economics will tell you that when demand increases companies are stimulated to build more in order to sell more; and if that doesn't happen other companies will happily step in to take up the slack and compete for that extra demand. But this is not happening in the telecoms market. Operators are dragging their feet in the building of new infrastructure – in particular new fixed infrastructure such as FttP. In the mobile market also we see great problems on the supply side, with network congestion and network breakdowns.

In these conditions; the telecoms industry is again realising the importance of the customer as increased competition and economic pressure forces the operators to attract and retain customers. New tools and techniques are now being deployed to assist this process, with real-time processing and data analytics being used to improve the customer experience. Operators are also increasingly reviewing service packages in order to entice the customer.

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While data management is becoming critical to business operations – very few companies have a good understanding of where their data is at any given time. As well as this; the enormous amount of data that is now being collected is placing a real strain on infrastructure, software and services. There clearly must be more intelligent ways to manage the data and both cloud deployments and Big Data analytics will remain hot trends for the near future. Indeed by 2015, BuddeComm can see that "the cloud" will be just another delivery model for a range of as-a-service offerings.

The role of external data centres are set to increase with organisations embracing this concept. The data centre market includes tele-housing facilities, co-location facilities, cloud and IT services, content hosting, connectivity and interconnection. They are important for the emerging developments surrounding cloud computing and the Internet of Things (M2M).

Mobile technology and smart devices continue to lead the way and mobile broadband has in fact become the fastest growth area for the overall telecoms sector. This in turn sees the number of Internet users continues to increase as the penetration of both fixed and mobile broadband becomes more accessible around the globe.

While the story for the traditional players in the telecoms market is all about shrinkage, on the other hand we see significant growth in many of the new subsectors of the broader ICT market, which includes cloud computing, data centres and M2M. The big picture reveals that many of the benefits and opportunities for telecommunications stretch far beyond the network and apply to social and economic benefits, healthcare, education, digital economy, businesses, new job creation and the green economy. All of these are potential opportunities and benefits that can be created on top of a robust global telecommunications infrastructure.

Examples of key insights:

The telecoms sector is the largest industry in terms of employment in the world and therefore developments in this sector have far reaching impact.

The role of external data centres is set to increase with organisations embracing this concept.

It has become clear that Over-The-Top (OTT) is 'the new normal' for the telecoms industry - with the emerging all-IP networks; telecoms services are basically moving to an OTT model.

Telecommunication infrastructure has become a commodity and it is about time we started treating it as that. The added value no longer resides in the commodity itself, but in what you can do with it; new revenues are not coming from the commodity but from the products and services that are built on top of it.

A vertically-integrated telco models make it impossible to adequately react to market changes.

It has now well and truly sunk in among most of the businesses experiencing challenging economic circumstances – adapt or perish. There won't be many organisations that will not be affected by the rapid changes in technology. The key here is that by using these new technologies you can start taking costs out of your business model. Customer experience is increasingly important to service differentiation; retaining customers in this competitive and economic environment is challenging. Data in this report is the latest available at the time of preparation and may not be for the current year

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