

NetEvents EMEA Press Spotlight
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Calling Winners and Losers as Operators Add More Services

Catherine Hammond
Principal Analyst

1

The revenue opportunity of value added services.

2

The importance of getting the basics right.

3

The customer benefits of value added services.

Value-added ICT services account for a small share of operator revenue

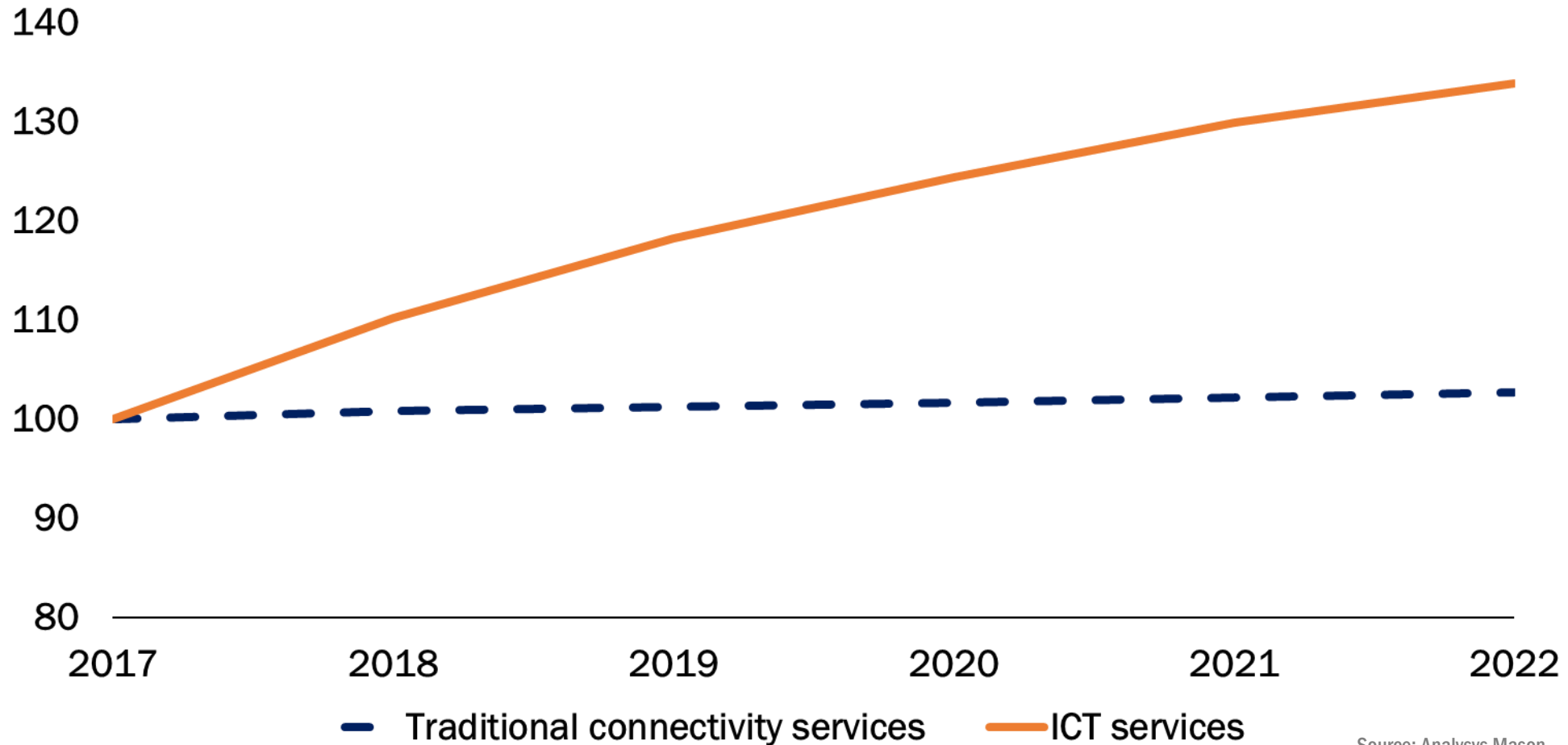
Operator revenue from enterprises, Europe, 2017



Source: Analysys Mason

Significantly, growth will come from these new services

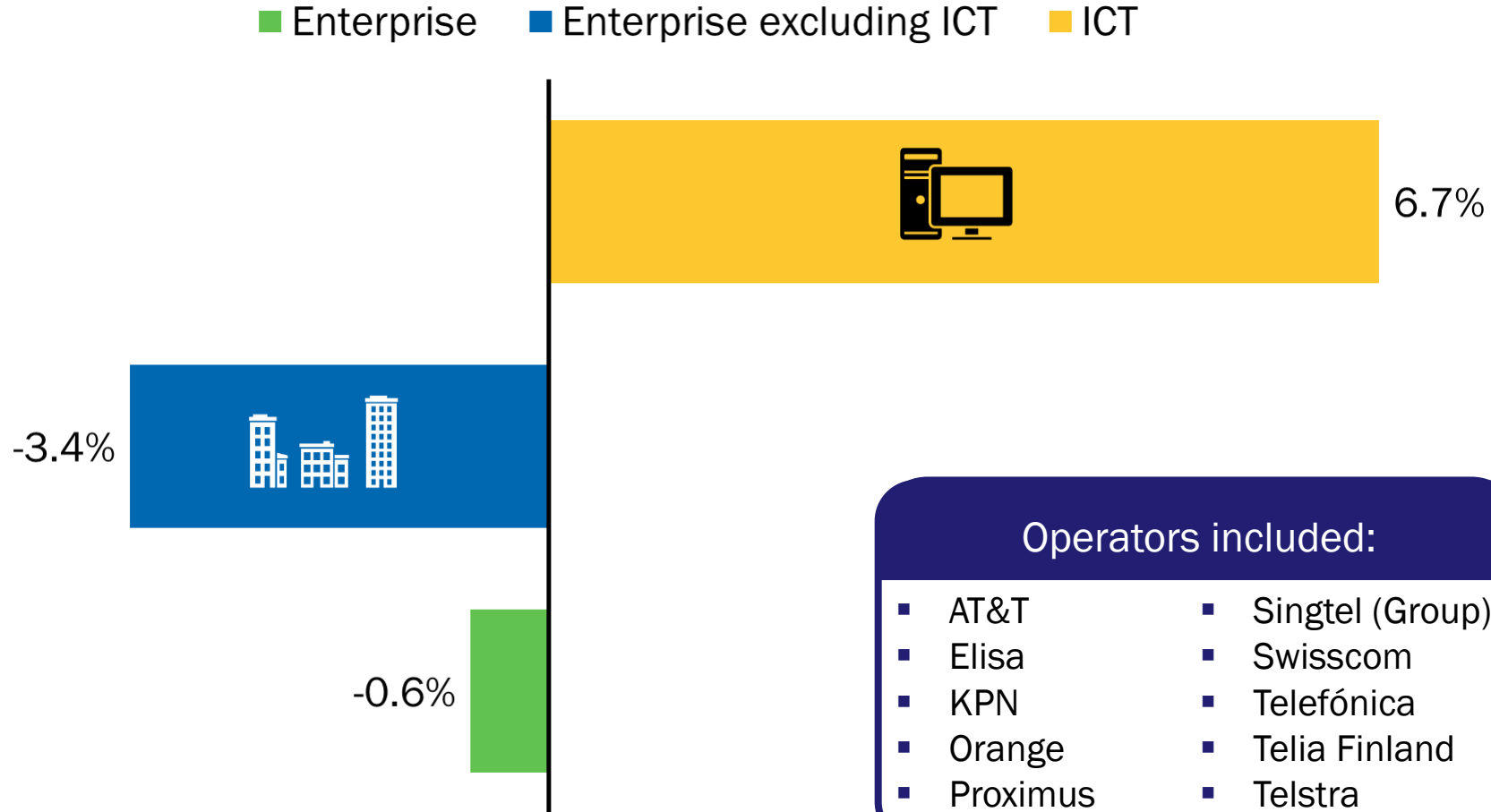
Operator enterprise revenue by service type, Europe (2017=100)



Source: Analysys Mason

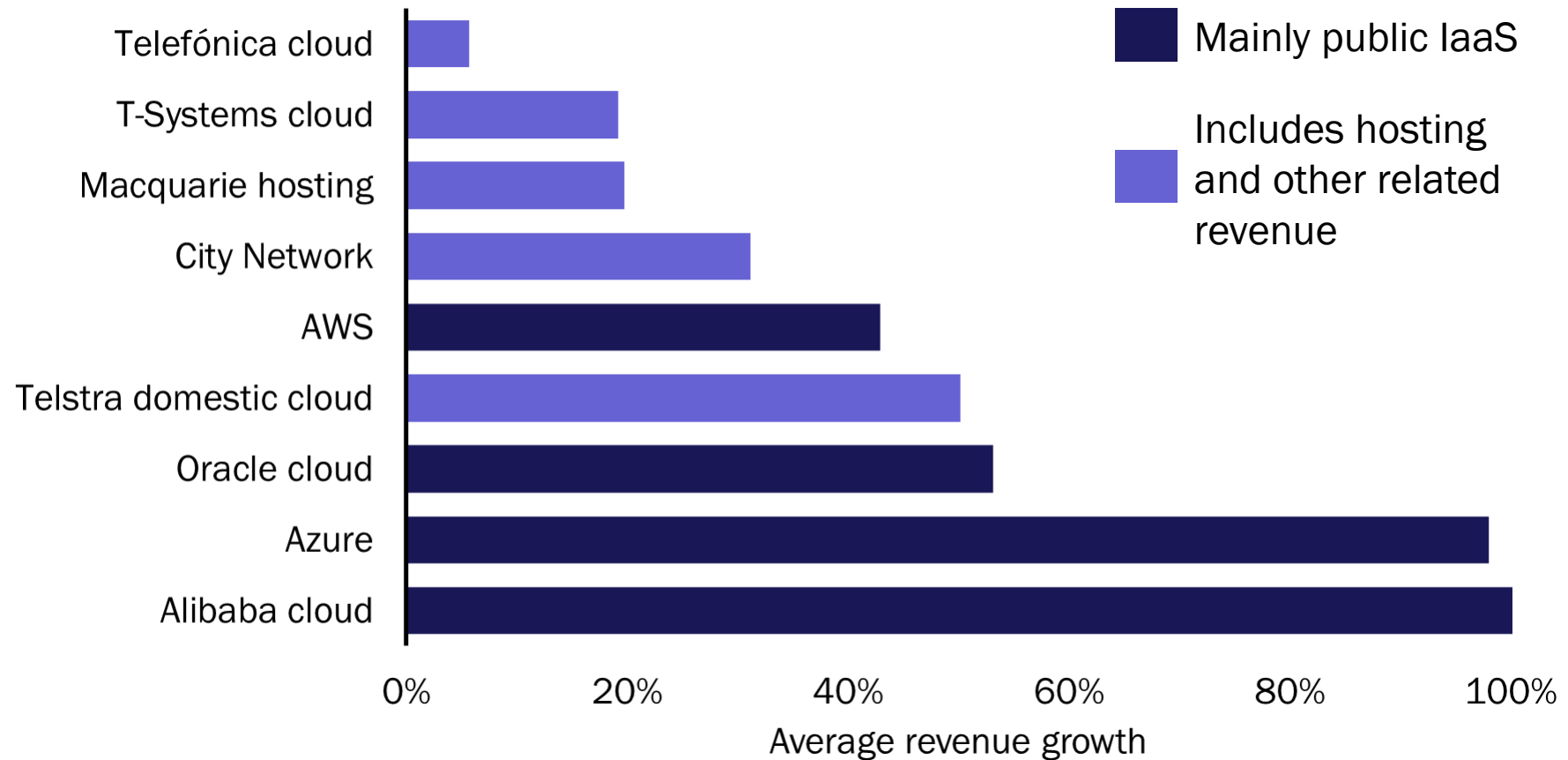
Many operators are relying on ICT services for revenue growth

Breakdown of enterprise revenue growth, 1H 2017 vs 1H 2018

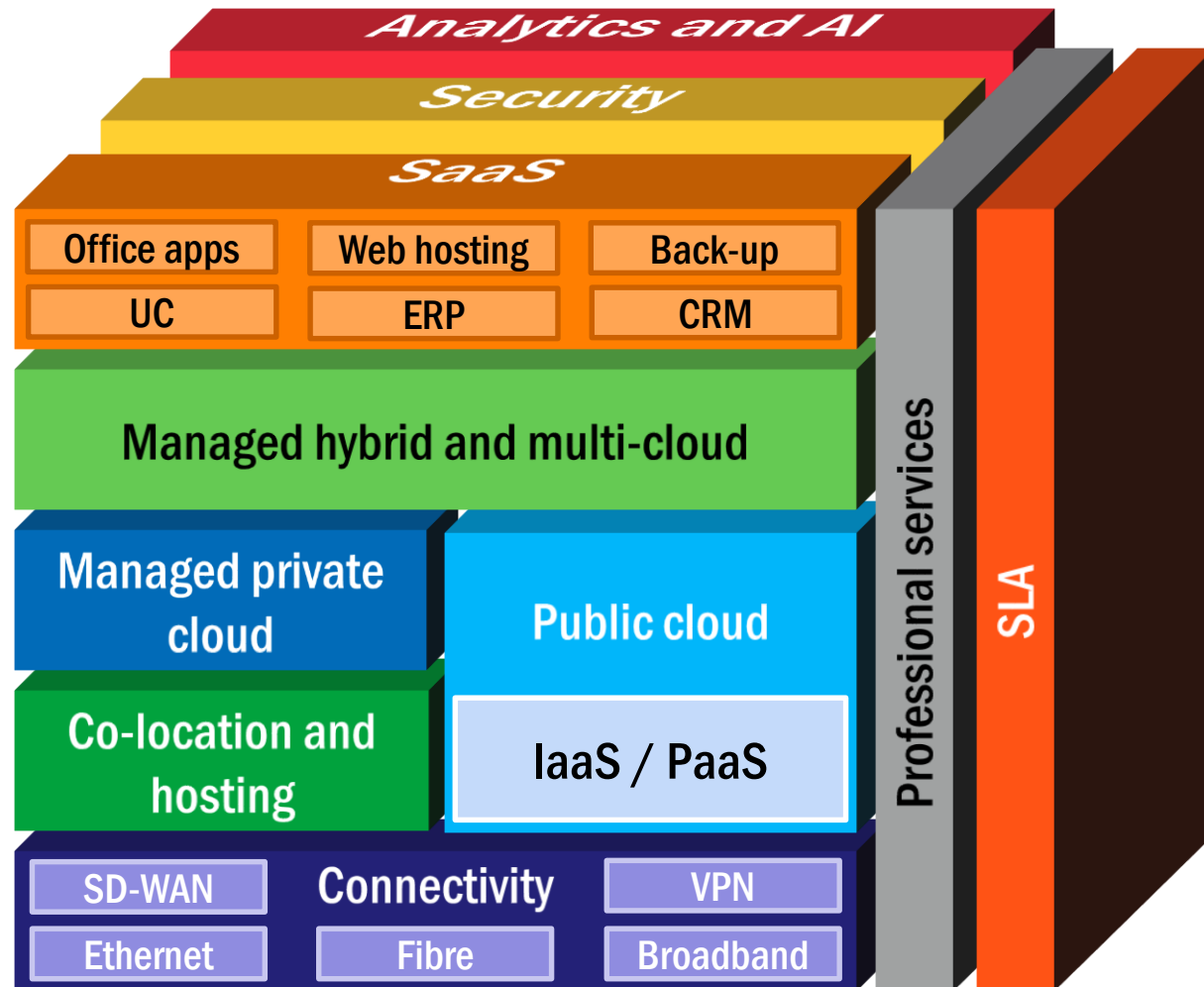


Cloud revenue is growing much faster for tech players than for operators

Growth of public cloud platforms compared with operator cloud revenue, year-on-year growth, 2016–2017

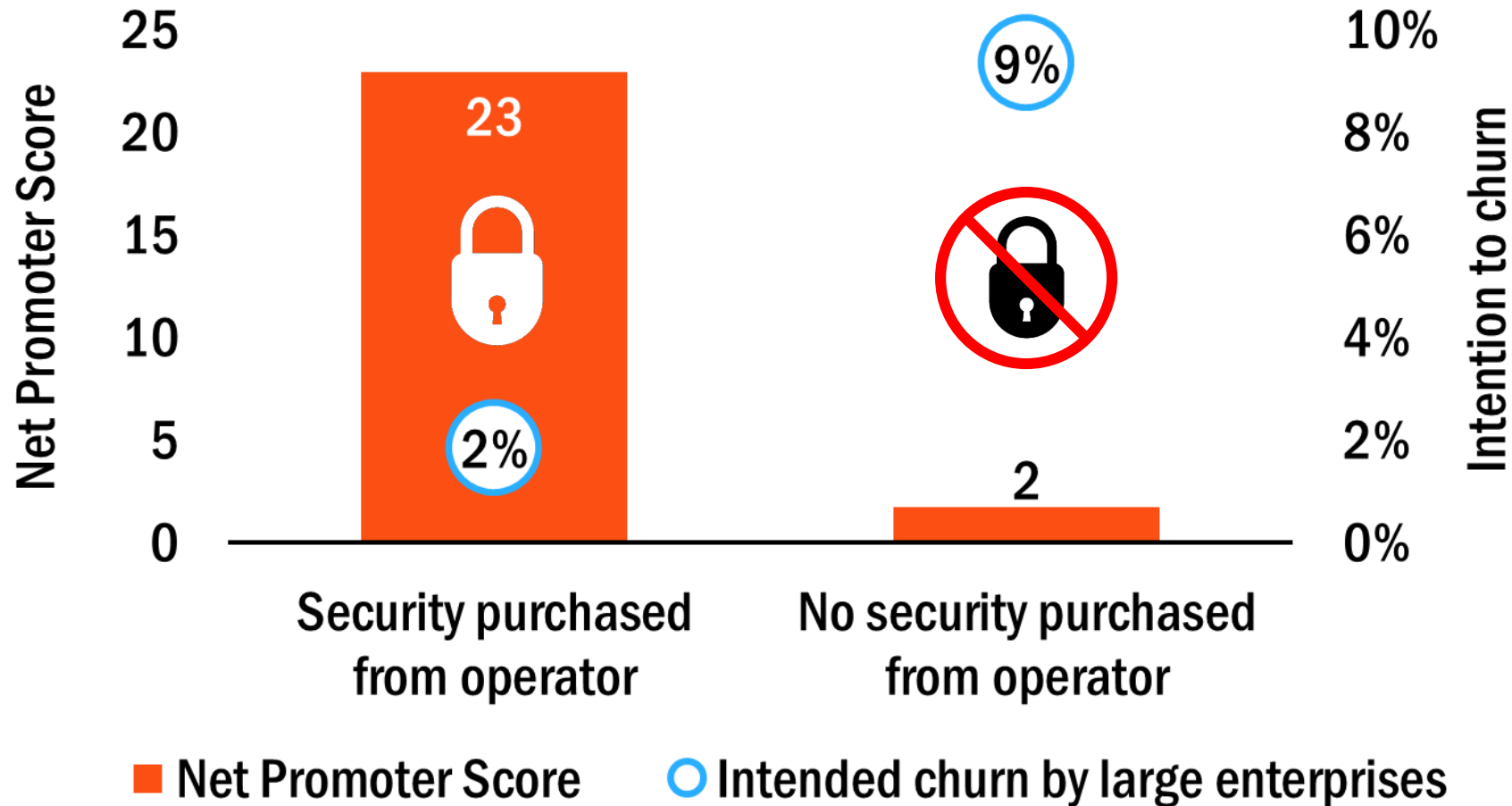


Network connectivity is foundational for delivering value-added services



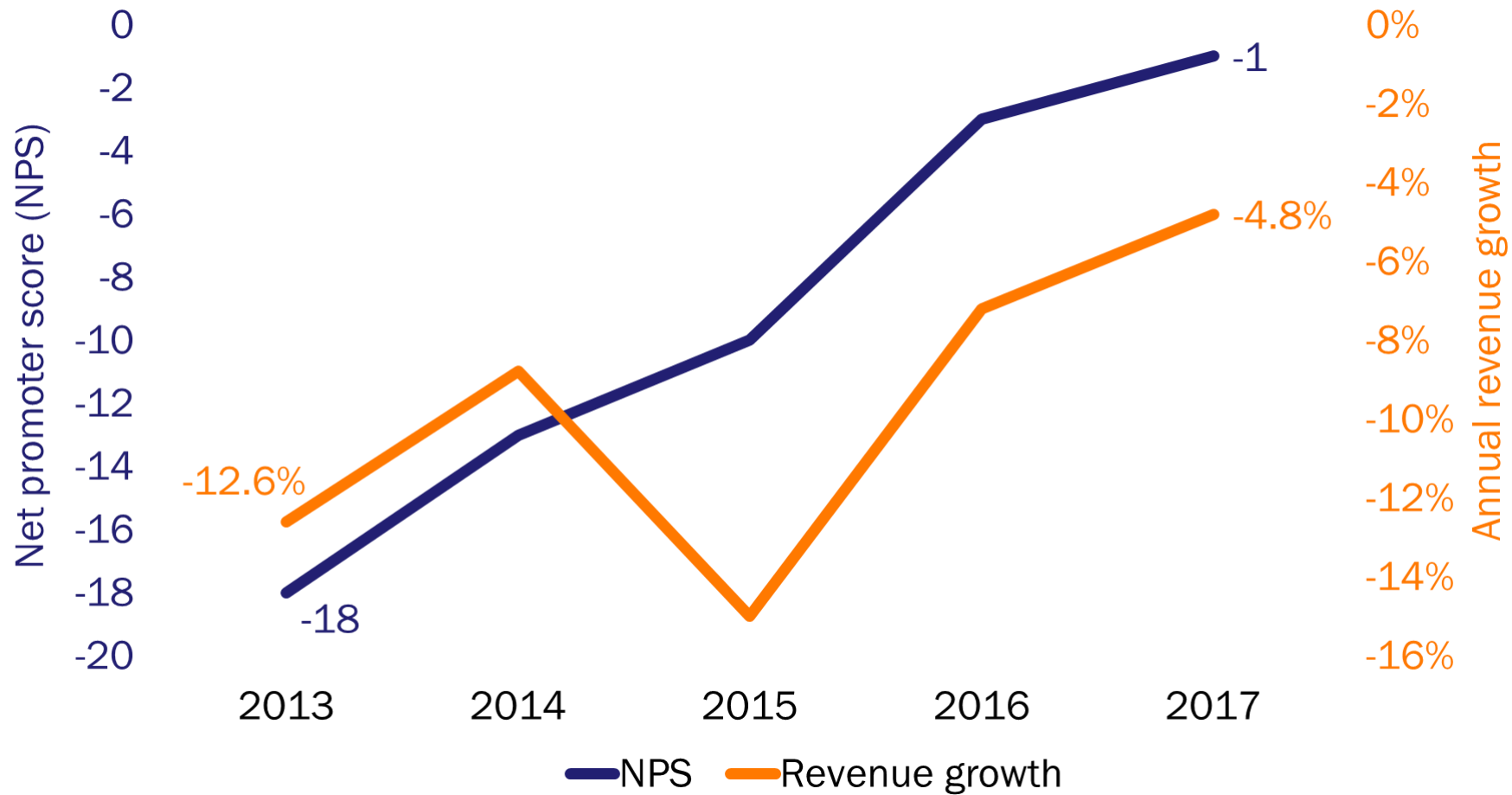
Source: Analysys Mason

Customer satisfaction is an important determinant of the success of value-added services for operators

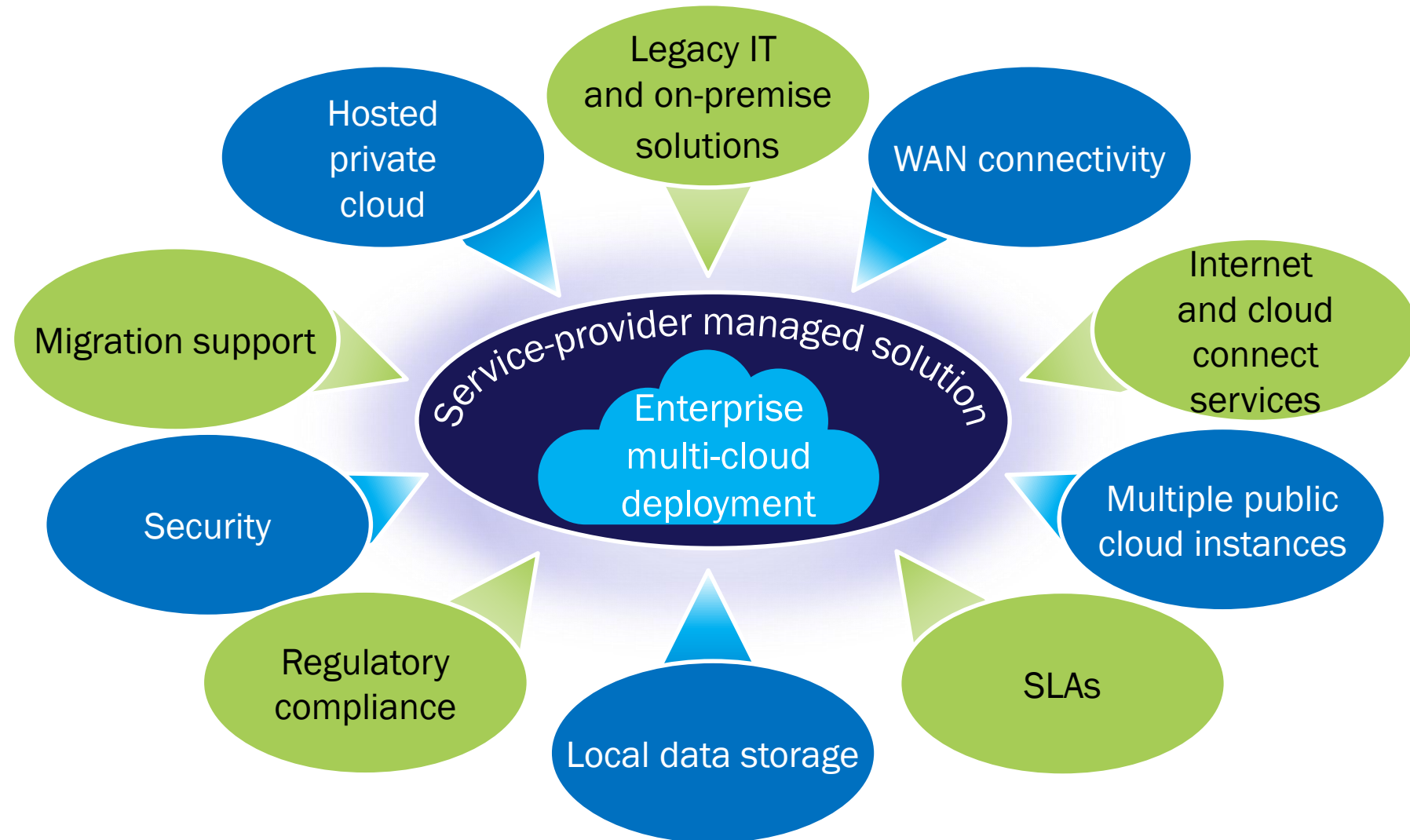


Source: Analysys Mason Enterprise survey 2017

Improved customer satisfaction is supporting the turn around of KPN's enterprise division



Service providers can bring real benefit to enterprises by supporting them in managing IT complexity



The potential business benefits of adopting value added services are many and varied



Contact details

Catherine Hammond

Principal Analyst

catherine.hammond@analysismason.com

 catherine-hammond-1691961

Boston

Tel: +1 202 331 3080
boston@analysismason.com

Cambridge

Tel: +44 (0)1223 460600
cambridge@analysismason.com

Dubai

Tel: +971 (0)4 446 7473
dubai@analysismason.com

Dublin

Tel: +353 (0)1 602 4755
dublin@analysismason.com

Hong Kong

Tel: +852 3669 7090
hongkong@analysismason.com

Kolkata

Tel: +91 33 4003 3093
kolkata@analysismason.com

London

Tel: +44 (0)20 7395 9000
london@analysismason.com

Madrid

Tel: +34 91 399 5016
madrid@analysismason.com

Manchester

Tel: +44 (0)161 877 7808
manchester@analysismason.com

Milan

Tel: +39 02 76 31 88 34
milan@analysismason.com

New Delhi

Tel: +91 124 4501860
newdelhi@analysismason.com

Oslo

Tel: +47 920 49 000
oslo@analysismason.com

Paris

Tel: +33 (0)1 72 71 96 96
paris@analysismason.com

New York


Tel: +212 944 5100
newyork@analysismason.com


Singapore

Tel: +65 6493 6038
singapore@analysismason.com


Stockholm

Tel: +46 709 211 719
stockholm@analysismason.com

 @AnalysysMason

 linkedin.com/company/analysys-mason

 youtube.com/AnalysysMason

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