

European Telco 2025: Digital Services for the Mass Market

AN IDC CONTINUOUS INTELLIGENCE SERVICE

How can telecommunications service providers (telcos) evolve their service strategy and portfolios to thrive in a digital future? The *European Telco 2025: Digital Services for the Mass Market* subscription service aims to answer this essential question. It examines telcos' evolving role in digital value chains, especially those associated with services that reach the largest possible audience – the mass market, made up of consumers and small businesses. This means tracking and forecasting the evolution of the market for core telecoms services in a changing marketplace, and understanding how these can best be complemented with new services to create new revenue streams and strengthen core services. It means understanding how telcos can best provide and communicate value to their customers, to remain relevant and build customer relationships. And how taking on the role of an enabler in the digital marketplace – enabling customers' digital lives, and enabling other digital service providers to better reach an audience, will help telcos find balance between fighting a losing battle against new competitors and fading into the background as a bit pipe.

Markets and Subjects Analyzed

- Transformation and evolution of telco service offerings in the 5G era
- Opportunities enabled by emerging technologies: 5G, edge, artificial intelligence (AI) and IoT
- Telco roles in the connected home
- TV and content strategy
- Monetization and uptake increase of 5G and FTTP
- Major trends in service pricing, bundling, and marketing
- The expansion of telcos' role into banking and payments
- Business cases around sustainability offerings
- Driving digital inclusion
- The roles of wholesale in telco strategy

Core Research

- Market Analysis Perspective: European Telco 2025
- Effectiveness of European Telcos' Consumer Strategies
- 5G in Vertical Applications: Media & Entertainment
- IDC Peerscape: driving uptake of advanced connectivity services
- European Telcos' Strategies for Media Services
- AI/ML Use Cases in Telco Services
- Mobile Banking: Balancing Innovation and Privacy
- IDC Peerscape: Driving Digital Inclusion
- Sustainability as a Competitive Tool for Telcos
- 5G and new media services
- The impact of eSIM on mass market mobile services
- Telco opportunities in cloud gaming
- European Mass Market Telecoms services Forecast, 2022-2026

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [European Telco 2025: Digital Services for the Mass Market](#).

Key Questions Answered

1. How are telcos reshaping their position in the digital economy?
2. Which emerging technologies and business models do telcos need to address and how?
3. What are the long-term scenarios and possibilities in 5G era for telcos in Europe?
4. What will be the telco revenue growth engines of the future?
5. How should telcos engage with customers and partners?
6. Where are the opportunities and the competitive threats telcos face?
7. How will changing consumer and business behaviour affect what telcos sell?
8. How do Providers demonstrate the value of their sustainability offering and how to incorporate these concepts into service propositions?

Companies Analyzed

This service reviews the strategies, market positioning, and future direction of several providers in the broad telecoms ecosystem market, including: Altiace, Apple, AT&T, Bouygues, BT, Cisco, Deutsche Telekom, eir, Ericsson, Facebook, Google, Huawei, KPN, Liberty Global, Meo, Masmovil, Microsoft, Nokia, NTT Communications, Orange, Proximus, Salt, Samsung, SFR, Sunrise, Swisscom, Tata Communications, TDC, Tele2, Telefónica, Telekom Austria, Telenor, Telia, TIM, Three, Verizon, Virgin Media, Vodafone, and Ziggo