Europe, Middle East and Africa Telco 2025: Infrastructure and Operational Transformation

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Faced with a saturated and declining market for traditional telecom services and the increasing domination of cloud-based OTT services and solutions, telcos are under extreme pressure to transform their strategies, infrastructure, ecosystems, and operations. They must work out when and how to compete, with whom to partner, where to operate in the digital value chain, how to identify and access emerging opportunities, and how to support the resulting explosion in complexity. They must transform their IT, networks, and operating models through convergence and virtualization to become agile, relevant, and trustworthy suppliers to customers and partners alike. IDC's *Europe, Middle East and Africa Telco 2025: Infrastructure and Operational Transformation* service presents IDC's analysis and insight into the future of the telecommunications industry across EMEA.

Markets and Subjects Analyzed

- Impact of 3rd Platform technologies and "innovation accelerators" on telcos: cloud, analytics, mobility, IoT, and digital transformation
- Network function virtualization (NFV) and software-defined networking (SDN)
- Infrastructure, staff, and operational models
- Platform economy and other emerging business models
- Telco cloud portfolios and strategies
- Customer experience
- The Internet of things (IoT)
- 5G and LTE
- New markets and customer types
- Advanced data analytics

Core Research

- Market Analysis Perspective: The 2025 EMEA Telco, 2018
- Europe, the Middle East, and Africa CSP Spending 2018–2022 Forecast
- Virtualization, Containers, and Beyond: CSP Networks Virtualization in EMEA
- EMEA CSP 2018 Outlook: Toward Telco 2025
- IDC FutureScape: Worldwide Cloud 2018 Predictions — Implications for Western Europe
- EMEA Radio Access Outlook: Toward 5G
- EMEA Telco Managed Services Market 2018–2022 Forecast
- EMEA Telco NCIS and Maintenance Market 2018–2022 Forecast
- EMEA Telecoms Equipment Market 2018–2022 Forecast
- Telco Multicloud Strategies in EMEA
- European Enterprise Communications Survey, 2018: Strategic Outlook Toward Telco 2020

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: Europe, Middle East and Africa Telco 2025: Infrastructure and Operational Transformation.

Key Questions Answered

1. How do telcos need to transform to compete in tomorrow's market?
2. What part do telcos have to play in a post-3rd Platform world, and where should they position themselves?
3. Should telcos be cloud providers or cloud enablers?
4. How will telcos' ICT needs evolve, and how can equipment providers meet them?
5. How can ICT solutions providers help telcos create relevant new operating models?
6. What impact will NFV and SDN have on telco infrastructure and operating models, and what opportunities will they enable?
7. Which telcos have compelling digital transformation strategies?
8. How can telcos best utilize advanced analytics to improve their customer insight?
9. How can telcos best work in the ecosystem of vendors, integrators, ISVs, and consulting companies?
10. What is the size and growth of the technology and country markets for telco infrastructure?

Companies Analyzed

This service reviews strategies, market positioning, and future direction of several providers in the broad telecoms ecosystem, including:

AT&T Inc., Accenture plc, Amdocs, Atos S.A., Avaya Inc., BT Group plc, Bharti Airtel Limited, Capgemini S.A., CenturyLink, Inc., Cisco Systems, Inc., Colt Group S.A., Dell Inc., Deloitte, Deutsche Telekom AG, Hewlett Packard Enterprise Enterprise, Huawei Technologies Co. Ltd., LM Ericsson Telephone Company, MTN Group, Netcracker Technology Corp., Nippon Telegraph and Telephone Corporation, Nokia Corporation, Oracle Corporation, Orange S.A., Swisscom AG, Tech Mahindra Limited, Telefonica S.A., Telenor ASA, TeliaSonera Aktiebolag, VMware, Inc., Verizon Communications, Inc., Veon Limited, Vodafone Group plc, Wipro Limited, Zain Group

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IDC UK Ltd, 5th Floor Ealing Cross, 85 Uxbridge Road, London W5 5TH, United Kingdom

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