



# New-entrant strategies in the mobile market: lessons for incumbents



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## About this report

This report provides a view of investment trends of a representative sample of telecoms operators worldwide and analyses the different approaches adopted by greenfield and established operators.

The report identifies three main areas where the approaches between the two categories of operators differ:

- investments and operating models (capex and opex)
- business models and revenue streams
- ecosystems and network openness.

It complements several of our reports, including our capex and opex forecasts, to give a picture of the possible evolution of investments and business models of different types of operator.

The report also provides recommendations for operators.

It is based on several sources:

- Analysys Mason's internal research, databases and forecasts
- interviews with stakeholders in the operator market.



### KEY QUESTIONS ANSWERED IN THIS REPORT

- How do operators think they will improve their profitability and the efficiency of their systems, and what should they invest in?
- What are the key differences in investment patterns between established operators and greenfield operators and what do these trends suggest about the operators' long-term ambitions?
- Which lessons can established operators learn from new entrants? Which strengths should established operators take advantage of?
- How can incumbent operators benefit from the entry of new operators?



### WHO SHOULD READ THIS REPORT

- MNOs' strategy executives and CxOs.
- MNOs that want to understand how their capex and opex strategies, their business models and their ecosystem positioning align with the wider industry.
- The investment community.



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- Video, Gaming and Entertainment



## Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



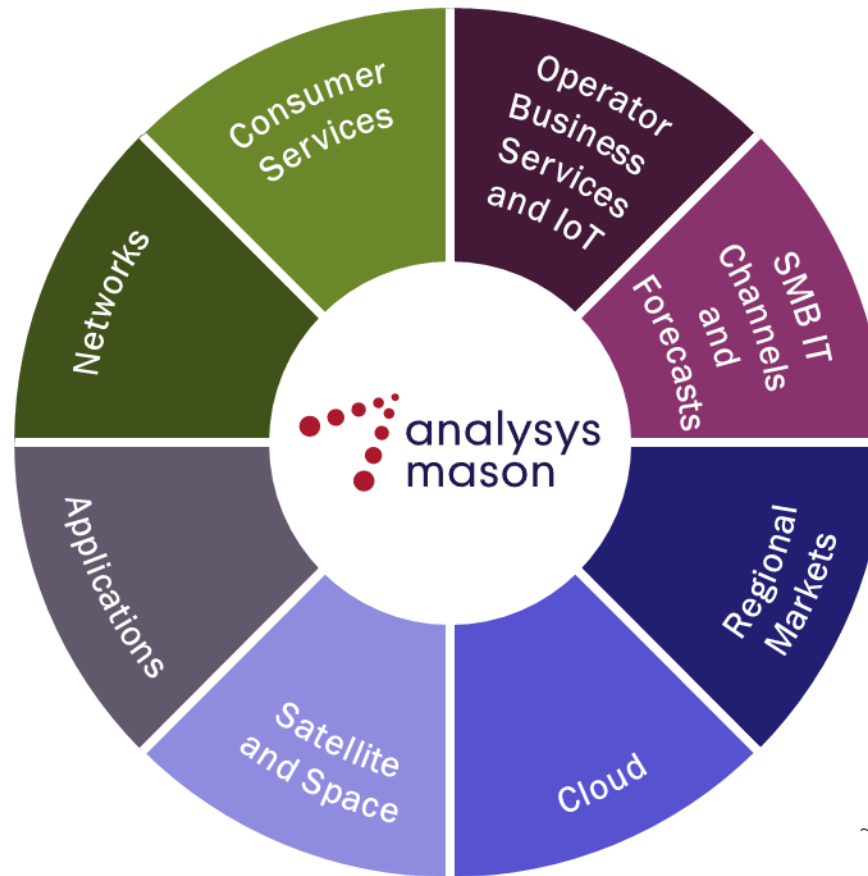
## Applications

- Network Automation and Orchestration
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## Satellite and Space

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- Space Applications and Infrastructure



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## SMB IT Channels and Forecasts

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- SMB Technology Forecaster



## Regional Markets

- Global Telecoms Data and Financial KPIs
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- European Core Forecasts
- European Telecoms Market Matrix
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## Cloud

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- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



## DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



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