



6G value chains: optimising the operator's role



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About this report

This report analyses the likely shape of the business models – and associated value chains – that will emerge with the evolution of the metaverse. This will be a process of significant change starting now, and extending to 2030 and beyond, by which time we envisage a Universal Digital Fabric (UDF)¹ that will enable the next generation of metaverse and 6G businesses.

The report provides predictions, roadmaps and recommendations for traditional and new telecoms operators, to help them formulate their strategies to maximise their role in metaverse value chains. It describes the value chains in the context of four layers, each of them providing different opportunities and challenges for operators. It also analyses the importance of converged, software-defined telecoms networks in various stages of evolution of the full metaverse/6G model and recommends how operators should capitalise on the assets and expertise that they have.

It is based on several sources, including:

- material developed for a keynote presentation for the Analysys Mason European Telecoms Summit 2022
- interviews and surveys of traditional and new operators and other stakeholders such as cloud providers
- forecasts of operator investment and ownership models for mobile, fixed and cloud infrastructure.

This document is for Analysys Mason's subscription service customers only. Usage is subject to the terms and conditions in our copyright notice. See slides 20 and 25 for definitions of the Universal Digital Fabric. For further information, see Analysys Mason's [Network requirements for the metaverse: towards 6G and a Universal Digital Fabric](#).



KEY QUESTIONS ANSWERED IN THIS REPORT

- How will value chains change to support industrial 5G platforms and future 6G/metaverse services?
- Which operator assets are essential to the development of the UDF to enable 6G/metaverse services?
- How can operators maximise the value of these assets in new value chains, however these eventually shape up?
- Should operators try to move to a digital services role or focus on infrastructure and on other strengths that can be adapted and expanded for future businesses?



WHO SHOULD READ THIS REPORT

- Strategy and futurism teams within operators
- Strategy and standards teams within vendors and other ecosystem players that are active in developing new platforms and frameworks for industrial 5G-Advanced (5G-A) and 6G/metaverse.
- Leaders of relevant industry organisations (for example, Telecom Infra Project and Open Compute Project)



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Research overview

Strategies to future-proof current 5G networks and business models





Value chain strategies for operators in the Industrial Edge Platform

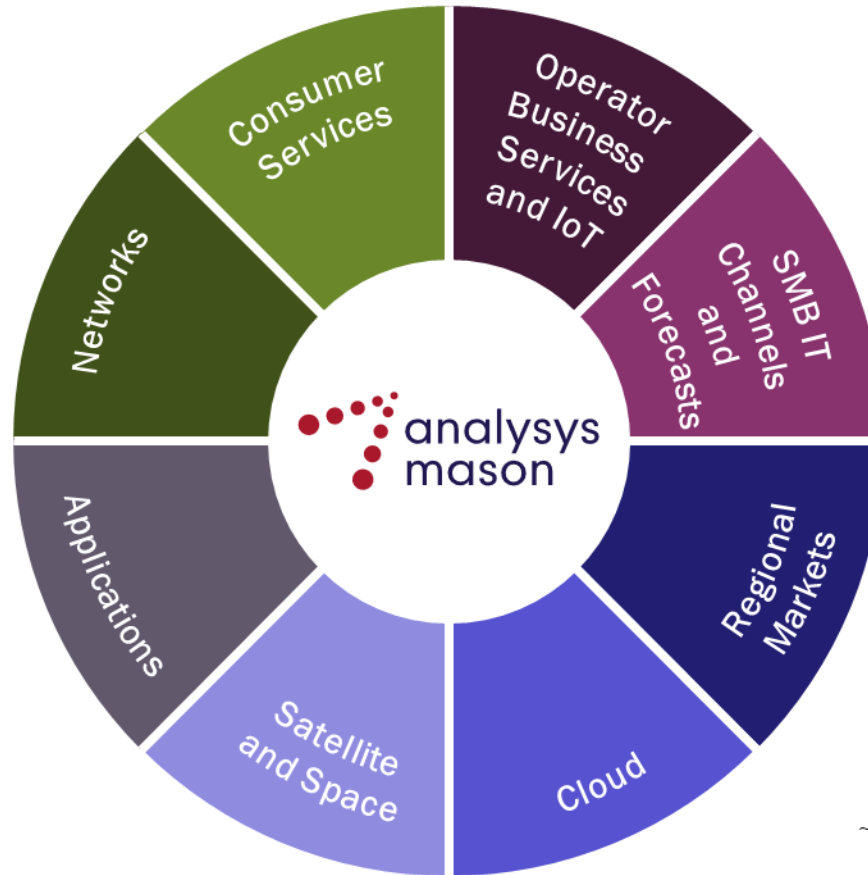
Value chain strategies for operators in the Universal Digital Fabric

Appendix

About the authors and Analysys Mason

Our research services

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Networks
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 - Regional results and worldwide totals
 - Operator historical data

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