

IMS, main driver for a new telecommunication world or only a new hype: a scenario methodology approach with stakeholder analysis

Final Dissertation M.liit in Marketing

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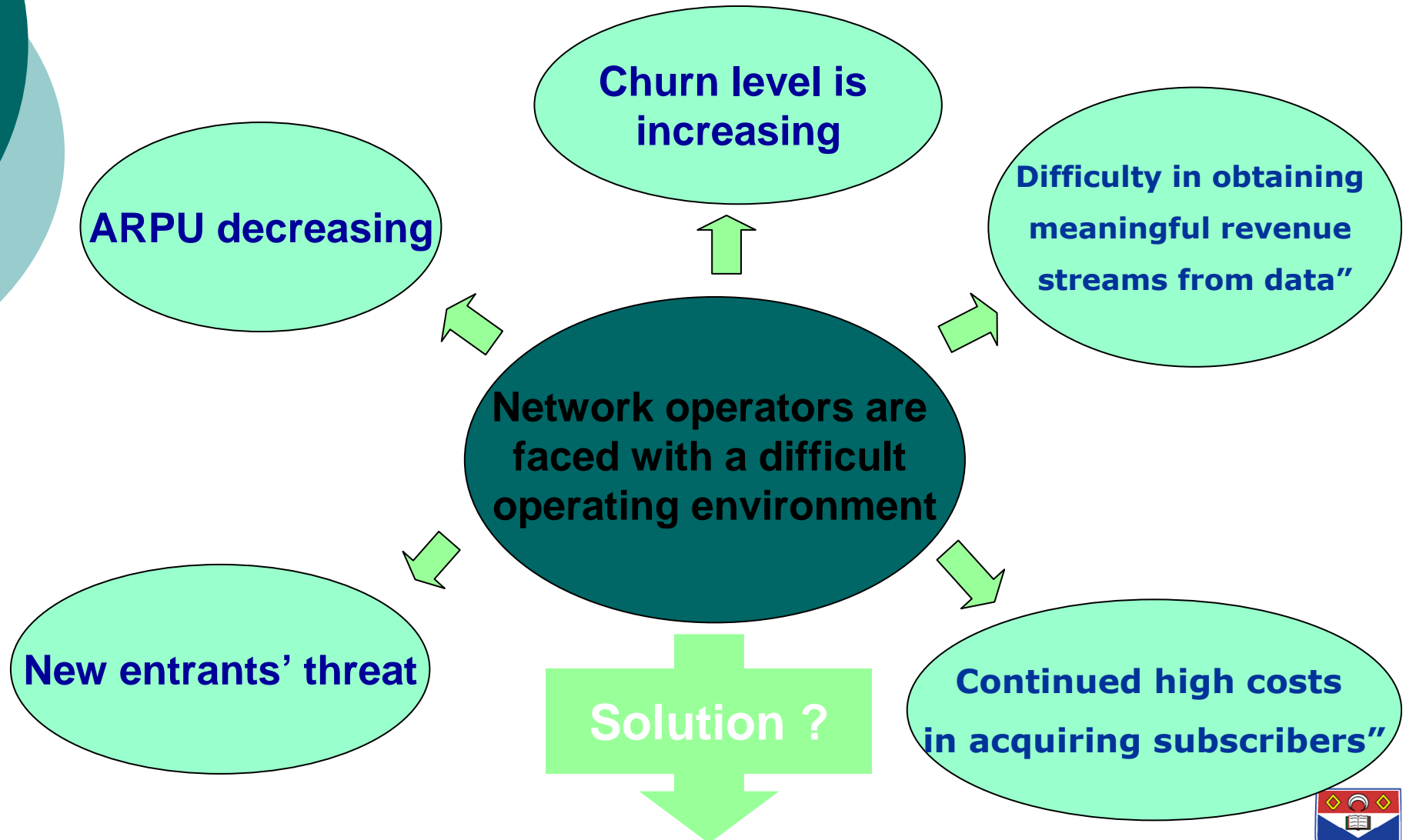


Agenda

- Today's situation
- Scenario Planning Approach
- Methodology followed
- 4 Scenarios and strategic implications
- Signposts

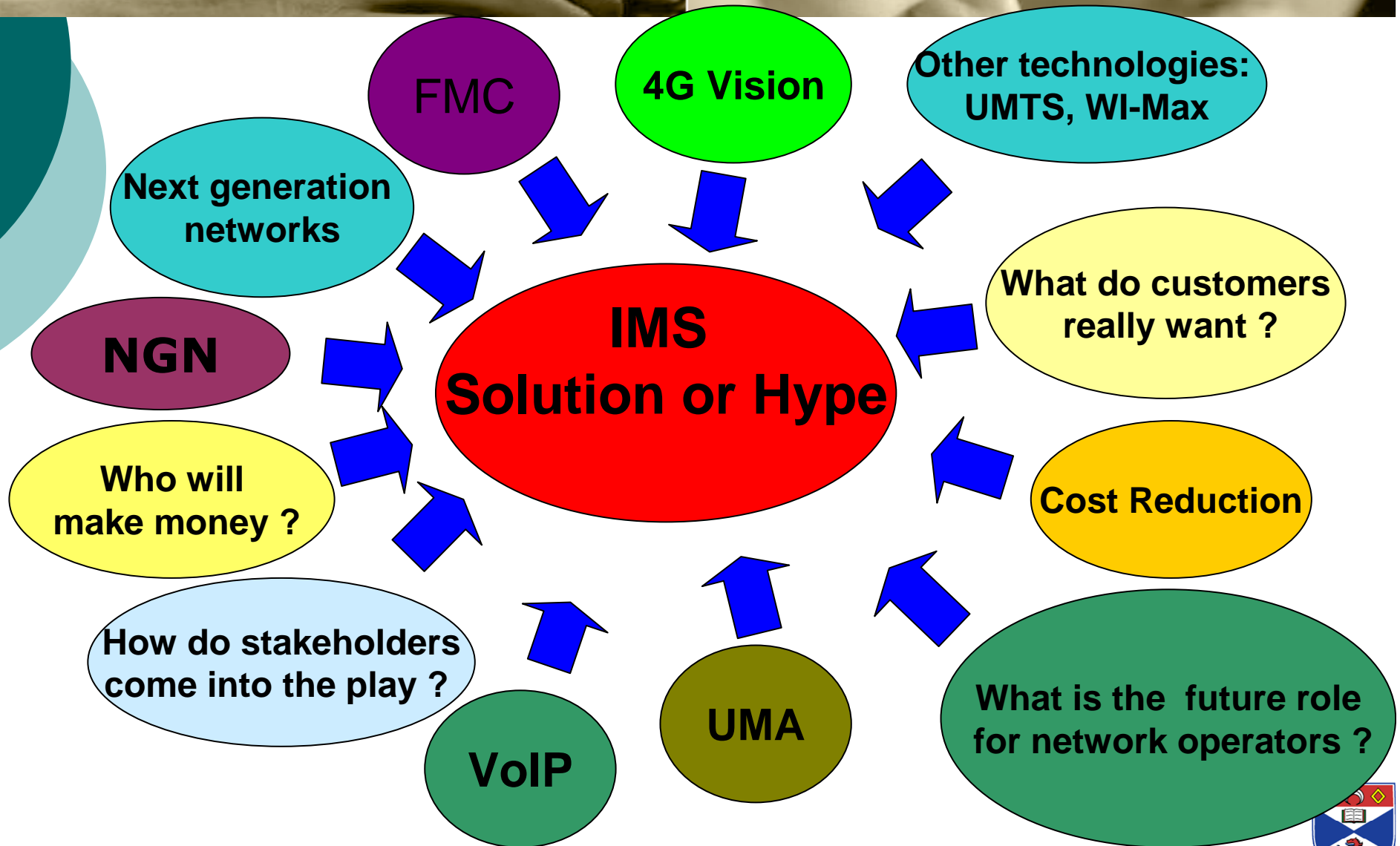


Today's situation



Today situation cont'd

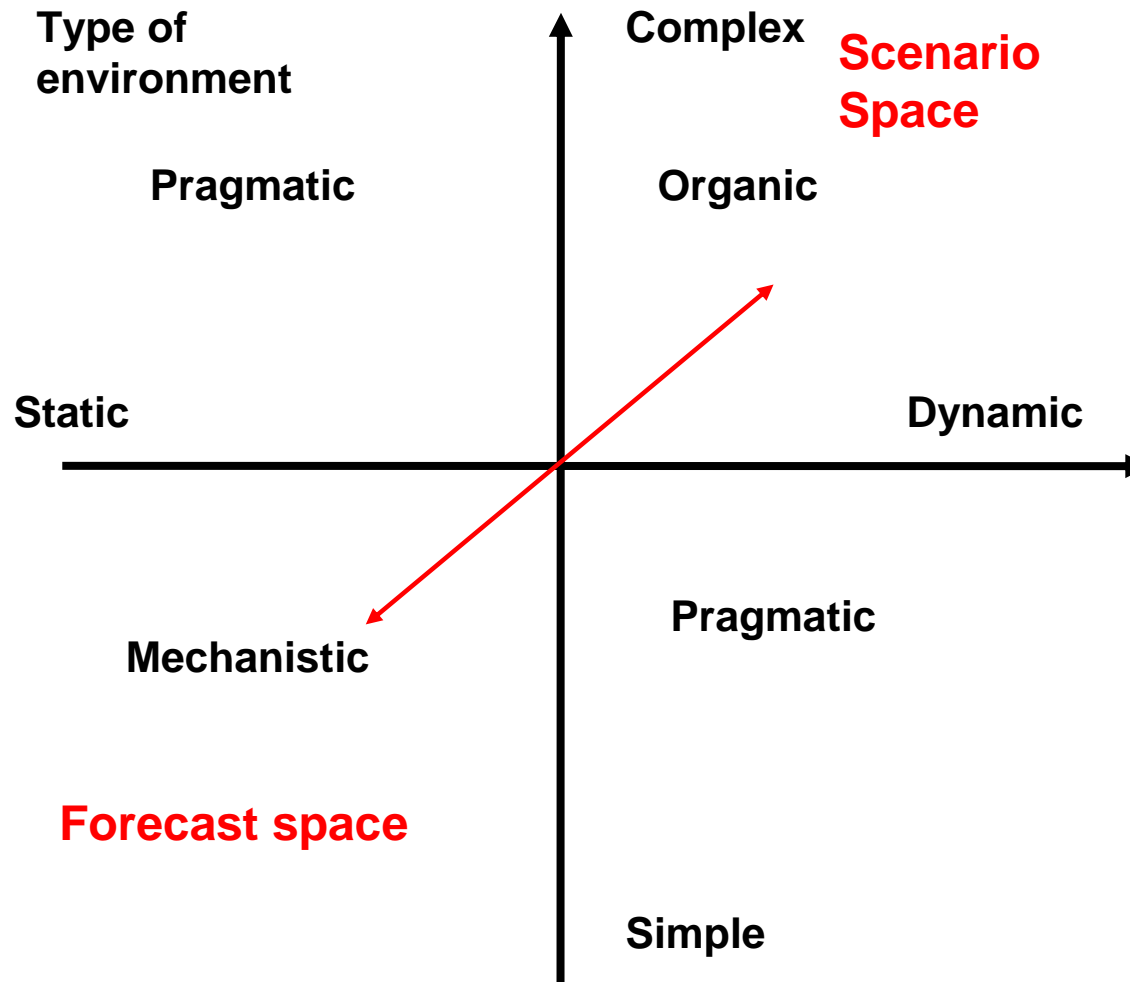
Lots of noise, confusion and question marks in telecom Industry



Scenario Planning

Scenario is considered suitable to investigate an issue in a complex and dynamic environment as telecom industry

Scenario versus Forecast





Methodology followed

I. Definition of the scope and time frame for our issue

II. Information Gathering:

- Research in academic and on line articles, company web sites, industry reports, standard bodies' web sites, books
- Industry experts' interviews

III. Data analysis

IV. Stakeholder's analysis and classification

V. Selection and ordering according to uncertainty and importance of the ten drivers

VI. Scenario Building

VII. Scenario Logic



The ten drivers

Importance

1) Network Operators' Will to deploy IMS in the right way.

2) The killer app arrives or not

3) Needs and wants of the customers of more compelling and cheaper services and a change of mentality

4) IMS enables cost reduction

Certain

Uncertain

5) Competition for operators

6) Customers understanding of new services that IMS enables

7) Effective Convergence

8) Customers loyalty-decreasing churn rate

9) Influence of other technologies

10) Interworking with legacy networks



The day after tomorrow scenario

IMS is successful and 4g vision is fully delivered

○ What we need to believe in order to bring about this scenario:

- Operators will deploy IMS in the right way
- Killer app arrives

Winners:

- Operators
- Users
- Equipment
- Vendors
- Handset Manufacturers
- IT Vendors

Losers:

Operators who didn't believe in IMS

Problems that have been solved:

Operators: Increasing ARPU, decreasing churn rate, decreasing costs, preventing NEW ENTRANTS' threats

- **Users:** having access to different ways of communication (voice, data, Video) regardless of the device and the network

- **Equipment vendors:** IMS represents a large source of revenue requiring a complete infrastructure upgrading

Strategic implications:

- Operators become service providers, release services very quick, understand customers' needs

- Customers enjoy convergence and combinational services, collaborate and demand new customized services (pull model)

- Vendors deliver devices and infrastructures that allow operators and customers to talk each other



Waterloo scenario

Operators tried to deploy IMS but failed

- **What we need to believe in order to bring about this scenario:**
 - Operators' will to deploy IMS in the right way
 - Killer app has not arrived

Winners:

- Operators that did not believe in IMS
- New Entrants
- Users

Losers:

- Operators who have implemented IMS
- Equipment Vendors

Problems that have been solved:

- Need of users for cheap and easily manageable services

Strategic implications:

- Operators don't change mentality, don't implement correct strategy to deploy IMS
- Customers are not ready for convergence, they look for compelling services but at lower price and easy to manage
- Vendors want to keep the intelligence into the devices



Midway scenario

Operators didn't believe in IMS, but customers was ready for convergence, UMA is the killer app

- **What we need to believe in order to bring about this scenario:**
 - No operators will to deploy
 - Killer app arrives

Winners:

- Wireline Operators that have invested in UMA
- Equipment Vendors that have provided UMA systems
- Users
- New Entrants
- Handset manufacturers

Losers:

- Operators that did not believe in UMA

Problems that have been solved:

- Users have better coverage, save money and have an only phone
- Operators increase revenues
- Vendors increase revenues

Strategic implications:

- Operators want to use their existing core network to deliver all GSM/GPRS services
- UMA has to be able to scale when the number of the users increases
- Operators want customer can use their PSTN numbers
- Operators want a large choice of handsets, being user-friendly
- A clear billing system is required



Back to the past scenario

In 2011 the situation has not changed in comparison with 2006, any form of FMC failed, operators has looked to growth their revenues by 5 % customers seek only to save money

○ What we need to believe in order to bring about this scenario:

- No operators will to deploy
- Killer app has not arrived

Winners:

- New Entrants to some extent

Losers:

- Operators
- Equipment Vendors
- Handset Manufacturers
- Chip Manufacturers
- IT Vendors
- Customers

Problems that have been solved:

- None

Strategic implications:

- No mentality change
- No unified world
- Operators deliver only cheap services, handset manufacturer focus on basic features devices
- ARPU decrease dramatically
- No brand loyalty means churn rate reaches the highest levels
- Operators, Handset manufacturers don't collaborate
- Only new entrants gain some advantages delivering cheap and easy to use services



Signposts

Factors to monitor which scenario is coming to pass

- Types of Handsets produced and sold
- Where revenues for data services come from
- How many IMS platforms are sold
- Number of testing and trialling
- Degree of interoperability
- Churn rates and Customer satisfaction





Summary

- Operators are facing several difficulties that hinder their growth
- FMC is considered the new revolution in telecom world delivering a 4G vision
- A big issue is whether IMS is the main driver for FMC or only a hype
- 4 scenarios have been built to paint different futures according to the most important drivers:
 - In 'The day after tomorrow' 4G vision is completely delivered thanks to complete IMS deployment
 - In 'Waterloo ' Operators believed in IMS but failed and 4G vision has not been delivered'
 - In 'Midway' Operators didn't believe in IMS but UMA became the killer app
 - In 'Back to the past' nothing has changed and operators see their revenues increasingly going down
- Signposts are put forward to monitor which scenario is going to pass



谢意

Merci

tack

спасибо

Thank you

danke

ευχαριστίες

Grazie

Bedankt

grazias