

2021 Research Themes

Topics shaping the industry and driving our focus

DATE

January 2021

Introduction: behind our 2021 themes

Scope

Building on content published in 2020, this document outlines the key research themes GSMA Intelligence will focus on in 2021.

2021 themes

Our 2021 research themes address the key trends and questions shaping the evolution of the telecoms industry in 2021 and beyond, and what they mean for players across the ecosystem.

What's ahead?

These themes set the direction of our Research Agenda and will be addressed throughout the year by means of reports, blogs, webinars, presentations, infographics and briefings with our clients.

About GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide. It is the most accurate and complete set of industry metrics available, comprising tens of millions of data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media. Our team of analysts and experts produce thought-leading research reports across a range of industry topics.

2021 Research Themes

Navigating the
impact of Covid-19:
short term versus
long term

Expanding the
internet's reach:
charting the impact
of mobile

Operator revenue
diversification:
rethinking growth

Mobile

**Fixed,
TV and
Convergence**

Devices and services:
understanding the
rapidly evolving
digital consumer

Capturing the 5G
opportunity:
B2B and B2C

**IoT &
Enterprise**

**Digital
Consumer**

Digitisation
of industries:
the new enterprise
agenda

Network
transformation:
building the network
of the future

Navigating the impact of Covid-19: short versus long term

There isn't a part of the global economy that wasn't disrupted by Covid-19 in 2020. There isn't a sector that won't change. 2021 will go a long way to determining the long-term impact of Covid-19 for consumers, businesses and societies.

While the impact on the telecoms industry looks less severe than on the broader economy, changes to the telco *modus operandi* will happen. Consumers are more tech-savvy and digital than ever, and advancing digitisation is now an imperative for enterprises.

What does this mean for the telecoms industry in 2021 and beyond? How should operators position themselves to adjust to the new customer and competitive dynamics?

Key 2020 research

- [Covid-19 impact on operators - quarterly series](#)
- [Covid-19 impact: digitisation moves up the agenda for businesses](#)
- [Covid-19 impact: fixed broadband rises to the challenge amid unprecedented demand](#)
- [IoT: counting the cost of Covid-19](#)
- [Covid-19 impact: the balance shifts from knowns to unknowns](#)
- [Covid-19 impact: digital divide exposed further in emerging markets](#)

Topics driving our 2021 deliverables

- Operator financials: the full impact of Covid-19 12 months on (revenues, profitability, capex)
- Impact of Covid-19 on competitive dynamics: mobile, fixed and pay TV
- Telecoms industry: assessing the long-term impact of Covid-19
- Consumer: understanding the evolving behaviour as the shift to digital services accelerates
- Enterprise IoT: the digitisation imperative and shifting enterprise priorities

Operator revenue diversification: rethinking growth

Revenue diversification is not new for operators, but recent trends and developments show that it is now more important than ever. As core revenues stagnate, major operators are intensifying their efforts to capture incremental value from the new areas of growth: digital services, platforms and applications.

Services beyond core* are starting to generate significant revenues, making them a key component of the new growth story for operators. The average contribution of services beyond core to total revenues reached 22% in 2019 for major operators, up from 17% in 2017.

That is significant progress but what lies ahead? How will 2021 shape operator revenue diversification?

Key 2020 research

- [Rethinking growth: operator revenue diversification is real and global](#)
- [Operator strategies for verticals in the 5G era](#)
- [O2 and Virgin Media merge to converge](#)
- [Operator revenue in the enterprise market](#)
- [Global Financial Benchmarking](#)
- [The 5G era for operators: investing in core networks, capturing B2B opportunities](#)

Topics driving our 2021 deliverables

- 2020 operator financial results: what drives growth beyond connectivity
- Impact of Covid-19 on operator revenues beyond core: acceleration versus business as usual
- B2C beyond core: new services, business models and challenges
- Vertical-focused strategies and implementation, and the role of 5G
- What success beyond core looks like: operators and services leading the way

* A range of B2C and B2B services, such as pay TV (traditional and over the top), media and advertising, IoT, cloud, security, financial and lifestyle services, and solutions for vertical industries.

Capturing the 5G opportunity: B2B and B2C

5G network investment and service commercialisation are scaling. This means that monetising 5G through new or enhanced use cases becomes an imperative going forward for the mobile industry.

For operators, the \$1 trillion 5G capex expected globally to 2025 adds pressure to find new B2C and B2B revenue opportunities. For network vendors, 5G brings new opportunities to drive network innovation and optimisation. For governments, 5G adds new possibilities to drive economic growth. Understanding customer expectations and needs is key to capturing the 5G opportunity.

In 2020, we saw the foundations being laid for 5G. What needs to be done in 2021 to scale and start monetising 5G?

Key 2020 research

- [Global 5G Landscape – Quarterly Series](#)
- [5G reality check: the expected and unexpected](#)
- [The 5G era for operators: investing in core networks, capturing B2B opportunities](#)
- [5G and economic growth: an assessment of GDP impacts in Canada](#)
- [5G report card: consumers give the thumbs up as outlook for 2021 improves](#)
- [Edge computing: technology and market developments in China](#)

Topics driving our 2021 deliverables

- Investing in and monetising 5G: short- versus long-term scenarios
- 5G use cases: a reality check and what could change the game
- Consumer: seeking the new killer app – all eyes on the new gaming and immersive reality
- 5G FWA on the rise: disruptive or niche?
- 5G for vertical industries: leaders versus laggards
- Driving economic growth: the role of 5G in national digital transformation agenda

Network transformation: building the network of the future

Network innovation is reaching new heights, but also extraordinary complexity. Operators and network vendors have never been so busy, eager to build the networks of the future. For most, the goal is twofold: to drive new revenue opportunities and make networks more efficient.

5G will add strength to new network models including open networks, cloud edge and private networks. It will also lead to an unprecedented commitment to energy efficiency – a new imperative for the industry. Understanding operator network transformation strategies is a critical foundation for comprehending the shape of the industry.

How will operators prioritise their network spend, and how far will the new network models go in 2021?

Key 2020 research

- [Network Transformation 2020](#)
- [2025 capex outlook \(2020 update\): the \\$1 trillion investment](#)
- [Is 2020 the year for mmWave?](#)
- [Opening the cloud network: click and collect](#)
- [5G energy efficiencies: green is the new black](#)
- [Rural broadband: getting up to speed](#)

Topics driving our 2021 deliverables

- Operator spending on networks: what's changing, what matters, what it means
- Scaling new network capabilities and models: cloud edge, open RAN, private networks and beyond
- Going green: energy benchmarking in mobile networks
- What 5G means for fixed networks and vice versa
- New spectrum models for future networks
- 5G: cost effectiveness of mmWave solutions

Digitisation of industries: the new enterprise agenda

Enterprises across a range of vertical industries are pushing ahead with their digital transformation plans to capture new revenue opportunities, streamline their operations and optimise costs. Agility and business continuity are key to succeed, and IoT is a central part of that equation. Covid-19 has accelerated these plans in some areas while negatively impacting spend in others.

Enterprise digitisation has precipitated a mix of supplier competition and partnerships between operators, network and equipment vendors, cloud companies and other specialists.

For operators specifically, understanding vertical requirements and how to position in emerging enabling technologies such as 5G, edge computing and private wireless will be critical to capturing value from the new enterprise.

Key 2020 research

- [Digital transformation of manufacturing and the role of operators in the 5G era](#)
- [IoT in business 2020: The enterprise voice on IoT adoption](#)
- [Cloud formations: operator-vendor partnerships feature heavily in outlook for edge](#)
- [IoT security for enterprises: make it work, make it easy](#)
- [Private networks unwrapped: find your role and own it](#)
- [IoT revenue: state of the market 2020](#)

Topics driving our 2021 deliverables

- Enterprise digitisation: new priorities, scenarios and the implications for the mobile ecosystem
- Capturing growth: verticals driving IoT uptake and the scale of the opportunity
- Moving up the IoT value chain: new opportunities and challenges for operators
- Private wireless networks: understanding disruption and opportunities
- IoT security: what is changing and where the opportunities lie

Devices and services: understanding the rapidly evolving digital consumer

The fallout from the Covid-19 pandemic is accelerating the shift to digital on many fronts, including a move from in-store to online purchasing on a larger scale, greater use of digital payments, increased consumption of digital services, and new ways to engage with digital content.

Many of these changes will be permanent, forming the new normal for consumers, and shaping their priorities and purchase decisions.

How will operators and other ecosystem players adjust their consumer-focused strategies to take advantage of these rapidly emerging trends? How will operators shape their offerings to increasingly support a fully digital customer experience?

Key 2020 research

- [Device portfolios and strategies in the 5G era](#)
- [Future of Devices: 5G and the China effect](#)
- [Smartphone Market Intelligence Dashboard](#)
- [eSIM moving up the agenda: from industry work to customer adoption](#)
- [Jio and the rumoured \\$50 smartphone: reading the signals](#)
- [Gaming: up in the air](#)

Topics driving our 2021 deliverables

- Future of devices: revisiting consumer priorities – tracking changes, adjusting strategies
- Gaming's break-out year: a burgeoning ecosystem of new platforms and business models
- The changing face of video: fragmentation and saturation intensify competition
- Smart home evolution and the role of telecoms operators
- eSIM on the rise: what is shaping the next generation of consumer connectivity

Expanding the internet's reach: charting the impact of mobile

Connectivity has never been more important and impactful. In the face of Covid-19 lockdowns, billions of individuals have turned to the internet to connect to friends and family, access education or health information, and safeguard economic activity. This is particularly the case in low- and middle-income countries where mobile accounts for nearly 9 in 10 of all broadband connections.

Understanding the extent of this reality across different regions is fundamental in 2021 and beyond.

What is the impact on the digital divide? Will the unconnected be less able to mitigate the economic and social disruption to their lives? What strategies are likely to be more effective to promote social and economic development?

Key 2020 research

- [2020 Mobile Industry Impact Report: Sustainable Development Goals](#)
- [The poverty reduction effects of mobile broadband in Africa: Evidence from Nigeria](#)
- [The State of Mobile Internet Connectivity Report 2020](#)
- [The Mobile Gender Gap Report 2020](#)
- [Effective spectrum pricing in Africa](#)
- [Mobile technology and economic growth](#)

Topics driving our 2021 deliverables

- Reducing the digital divide: barriers to mobile internet coverage and adoption
- Less visible barriers to effective mobile connectivity: measuring digital skills
- Effectiveness of policy strategies to expand mobile network coverage and increase service adoption
- Lifting people out of poverty: mobile and financial inclusion
- Scaling digital platforms in developing markets: the role of partnerships

gsmaintelligence.com

[@GSMAi](https://twitter.com/GSMAi)

