Mobile Network Outsourcing & Sharing

The end of network-centricity?

Innovation Reports

Today, network sharing and outsourcing are not confined to challengers in the mobile market anymore but have become widely adopted among all kinds of mobile operators. This report presents different flavours of outsourcing and sharing and what drives mobile operators to do so. The analysis also sheds light on the long term impact on the industry, including equipment vendors.

Key questions

- Temporary hype or the end of the era of integrated network operators/service providers?
- Are network operations still part of MNOs' core competencies?
- How much can MNOs realistically expect to save?
- How relevant are non-cost related drivers to network outsourcing and sharing?
- Is regulation a major obstacle?
- What are the major outsourcing and sharing deals?
- What are the trends of the mobile network outsourcing market?
- Which strategic position to adopt for equipment vendors?

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1. Executive Summary

2. Methodology

3. Network Outsourcing Market Overview

3.1. Defining network outsourcing
- Network outsourcing approaches
- Maintenance outsourcing
- Network operations and maintenance outsourcing
- Full network outsourcing

3.2. Network outsourcing agreements
- Full outsourcing
- Managed capacity (MC)
- Out-tasking
- Managed operations (MO)

3.3. Case studies
- Major outsourcing deals
- Indian Joint venture: Reliance Communications and Alcatel-Lucent

3.4. Market trends
- Worldwide outsourcing per region
- Worldwide outsourcing per type of operators

4. Network Sharing Market Overview

4.1. Defining network sharing
- Network sharing approaches
- Passive mobile sharing or site sharing
- Active mobile sharing or network telecommunication element sharing

4.2. Network sharing agreements
- Joint venture
- Joint venture plus common service company
- Network sharing and maintenance outsourcing
- MVNO deals

4.3. Case studies
- Major sharing deals
- Vodafone: the most proactive operator

4.4. Market trends
- Network sharing: the main operators' concern
- Scope mainly limited to passive sharing
- Geographic aspects

5. A New Business Model?

- Mobile Broadband Network Limited (MBNL) joint venture
- 3G Infrastructure Services AB joint venture
- Challenges & Benefits for operator & manufacturer

6. Why are Mobile Operators considering Network outsourcing & Network sharing?

6.1. Key market adoption drivers
6.2. Financial performance
6.3. Cost saving, not the only driver…
6.3.1. Focus on marketing
6.3.2. Network performance
6.3.3. Environmental considerations
6.4. Regulatory issues affecting the market's development

7. Positioning of Vendors on Outsourcing and on Sharing

7.1. Industry overview
- The growing opportunity
- The battle for the leadership is fierce
- Momentum highly strategic for vendors
- Which players are legitimate?
- Network Sharing: any role for vendors?

7.2. Strategy of major equipment vendors

For each vendor analysed:
- Key figures / Scale
- Assets
- Network outsourcing strategy
- Network sharing strategy

7.2.1. Ericsson
7.2.2. Nokia Siemens Networks
7.2.3. Alcatel-Lucent
7.2.4. Huawei
7.2.5. Other players
- Motorola
- Nortel
- ZTE

7.3. Factors influencing operator decision-making
- Strength of existing relationship based on trust
- Reputation and track record
- Technological expertise in multi vendor and multi technology environments
- Local presence in relevant markets

8. Outlook

8.1. Market size
8.2. An accelerator for operators to re-think business models
8.3. From niche to mainstream to ServCo
8.4. MNOs joining forces to deploy LTE
8.5. Equipment vendors

Operators studied in the report

3, Airtel, Bharti, China Telecom, China Unicom, Essar, Mobily, KPN, Optus, Orange, Reliance, Tele2, Telefonica, Telenor, TeliaSonera, Telstra, T-Mobile, Vodafone, Yoigo

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