

Trends identification & business case development for a Major Mobile Network Infrastructure Vendor

• Situation & Challenges

Our client, one of the largest network infrastructure vendors in the world, had recently concluded a worldwide operator segmentation exercise to gain better understanding into the operators' network equipment purchasing behavior. The exercise resulted in the identification 5 different operator segments in APAC, one of which was of particular interest to the client. The client wanted to be able to engage these APAC operators from this segment beyond its regular sales driven approach through forward looking strategic initiatives. Client believed that RedPill is the most appropriate firm to help do this for them given the previous work we have done with them in the past.

• Our Approach

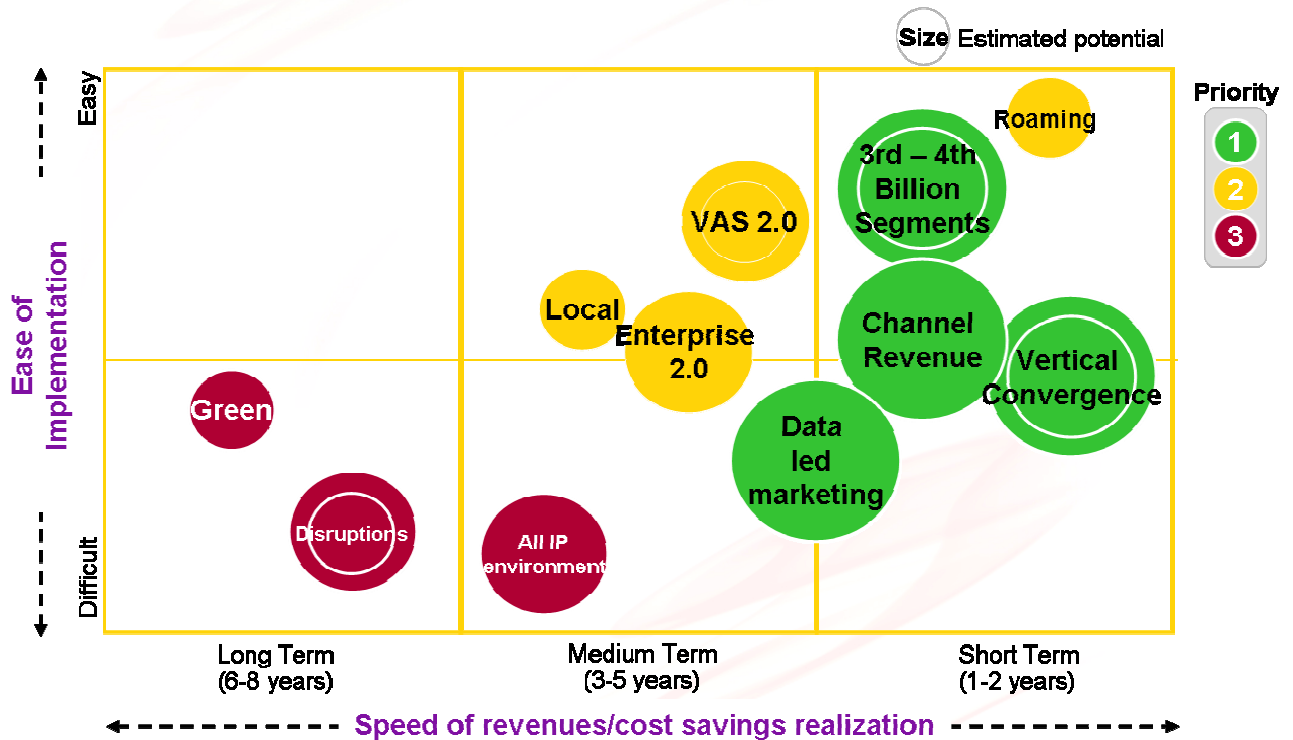
Starting with extensive secondary research, we identified industry-shaping trends to establish strategic opportunities in the short, medium and the long term for operators from the given segment. The trends identified spanned opportunities across the entire range of the telecom business including new markets, technologies, business models, new revenue streams, VAS 2.0, data-led initiatives & innovative marketing among many other areas. We then built an extensive collection of case studies to identify tried & tested methods to leverage these trends & showcase the opportunity that can be leveraged.

Using these materials developed, we conducted a series of workshops with key client teams to gather their opinions, validate and short-list trends relevant to their business. The exercise resulted in a shorter list of 11 trends that client teams felt were both relevant to operators as well as to their own business.

As the next step, we categorized these trends into 3 buckets - nascent, emerging and established - to define the related opportunities for operators as short, medium and long term. Given this categorization, we developed the trends further by answering 5 key questions pertaining to each of these trends -

- a. What is the trend & what are the underlying components/ sub-trends?
- b. What are its implications for operators and which of the operator concerns can it address?

- c. How can operators leverage the trend?
- d. Why is trend relevant now and how is the opportunity characterized (size, time to realization, ease of implementation)?
- e. What are the barriers to leveraging the trend?



With the leveraging strategy and other details for each of the trends identified, we then began engaging APAC operators from the segment via interviews with marketing, strategy and finance heads from these operators. The interviews, besides having been designed to gather opinions of senior telecom executives on the trends, also served to identify clear areas for which our client needed to develop solutions and use them to potentially engage operators.

Taking the exercise further, we selected 4 trends specially relevant to one key operator of special interest to the client and developed complete business cases for the same with that operator and its market in mind.

• Result

The client accepted all our recommendations and has begun to engage operators based on the work we have established.