

Market overview

demand for digital services is still growing, as consumers demand what people in more developed markets already take for granted.

Business drivers



Customers

- **Data usage continues to explode**, driven by proliferation of devices and more data intensive content (esp. video, enterprise)
- **Ecosystem services** in mobile and home becoming key customer criterion, reducing ability to differentiate only via connectivity services



Competition / Value Chain

- **Integrated and seamless access** to content and services across devices increases customer affinity and stickiness
- **Ubiquitous connectivity and smart devices** continuing to **open up new industries** (e.g. health, financial services, education)



Technology

- Fixed-line network increasingly **converging** with mobile networks
- Increasing cost and complexity of **adding network capacity** in highly dense areas



Government

- **Security and privacy** are becoming more relevant for regulators, policy makers, and public discourse
- Regulation could strike a **new balance** between investment stimulation and consumer benefit