Globalni trendi razvoja

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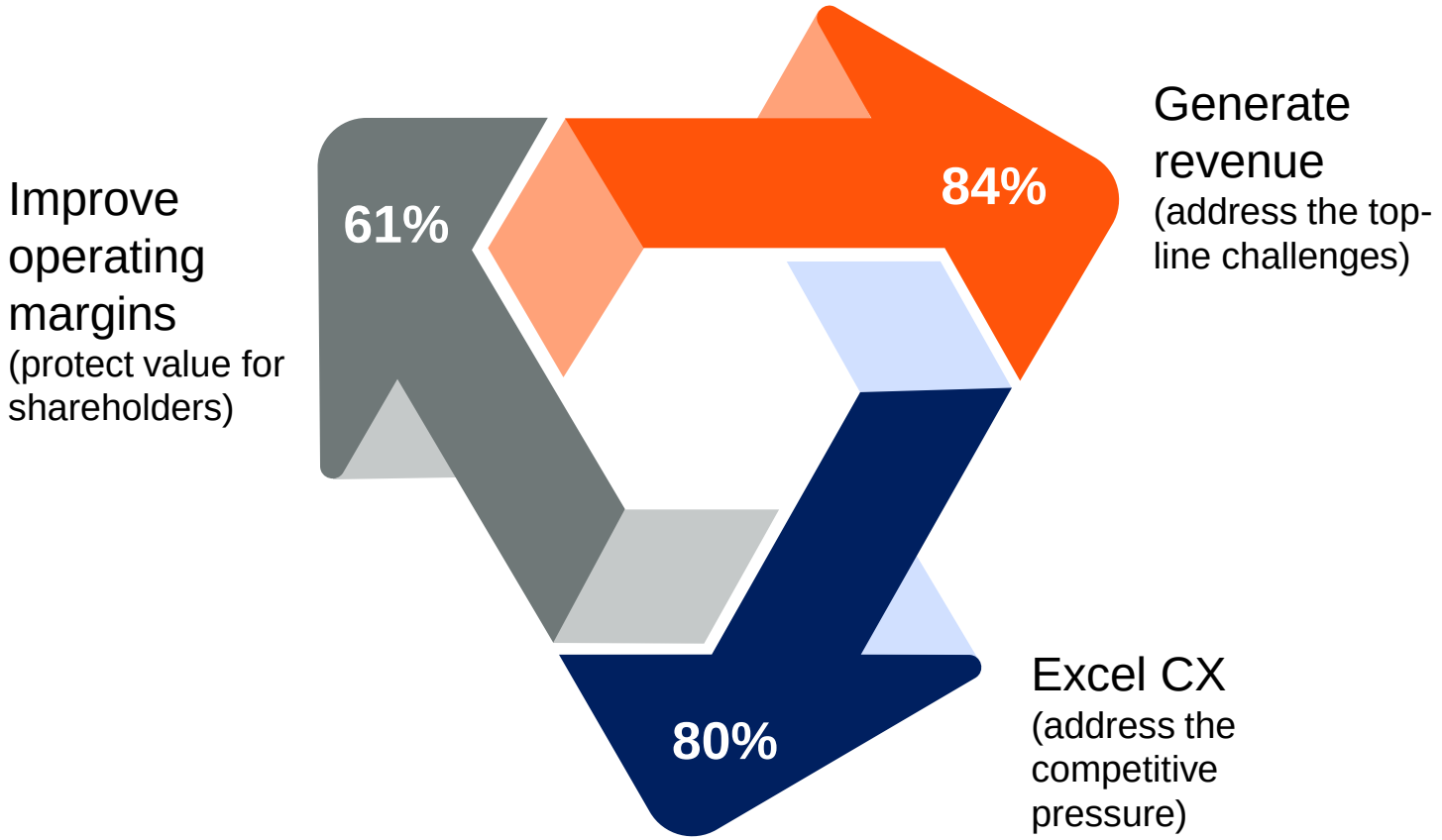
Top Themes for CSPs in 2024

Efficiency and Growth Underlines the Industry Dynamics

While telcos focus on growth, particularly in the B2B market segment, focus on operating margins and CX improvement will be crucial.

Focus on efficiency and operating margins will continue to drive initiatives such as hyperautomation, accelerating digital execution and adoption of platforms for scalability in operations. These efficiency-led initiatives also provide opportunities for growth through business model changes,

As an example, platforms can provide efficient business process implementation and also enable better collaboration with the ecosystem for monetization purposes. Technologies like cloud, analytics, AI, IoT, private mobile networks, edge and blockchain and concepts such as platforms present opportunities to all — telcos, CSPs and the competing disruptor companies in the industry. Success depends on leadership's posture toward change, risk-taking abilities, agility and innovation practices.



n = 44 CSP CIOs and technology executives answering

Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise? Source: 2024 Gartner CIO and Technology Executive Survey

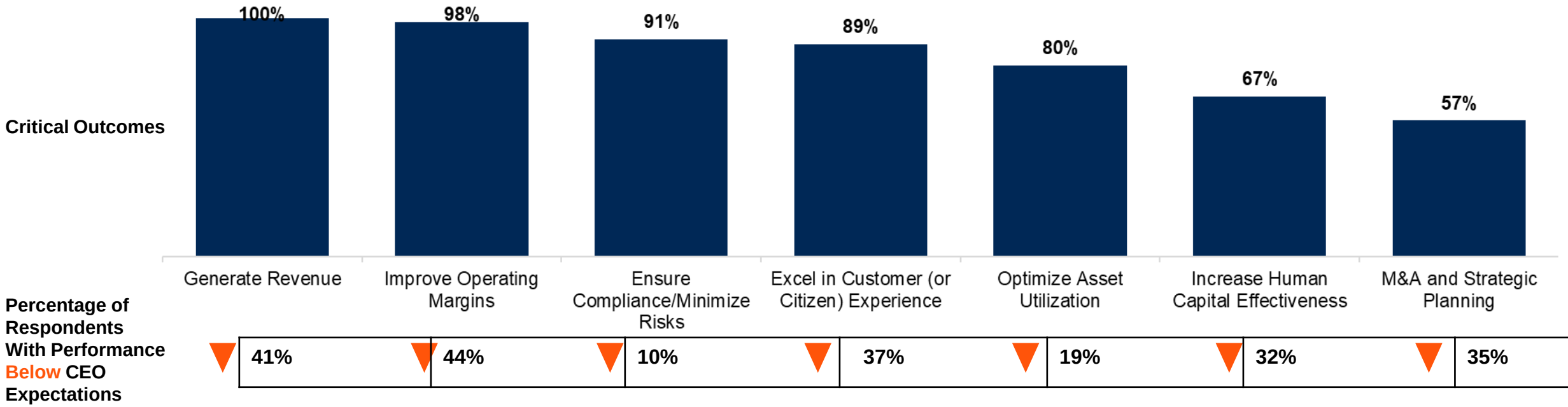
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Critical Outcomes of Digital Technology Investments

Critical Outcomes of Digital Technology Investments and Performance of Outcomes Against CEO Expectations
Percentage of CSP Respondents, Multiple Responses Allowed



n = 46; CSP CIOs and Technology Executives answering
Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise? (Multiple responses allowed)
n varies; CSP CIOs and Technology Executives to select the given outcome as most critical answering
Q. How would your CEO (or head of the enterprise, agency, bureau or department) rate the performance of your enterprise's investments in digital technologies toward the realization of these business outcomes?
Source: 2025 Gartner CIO and Technology Executive Survey

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Key Issues

1. Next 5-Years Landscape in the Communications Industry
2. Operating model transformation in CSPs
3. Why Industry Cloud Platforms Demand a Rethink?

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Key Impact Factors Over Next 5 Years

Capital

Capital refers to changes in availability of capital to the telecom industry.

Geopolitics

Geopolitics points to emergence of new forces, often contrary to the ones in last decade

Industry structure

Industry structure points to forces distorting and shaping the sphere of influence among industry actors.

Market demand

Market demand refers to the changes in demand from consumers and enterprises.

Organization

Organization refers to the structure and capabilities required for faster adaptation with market.

Laws and regulation

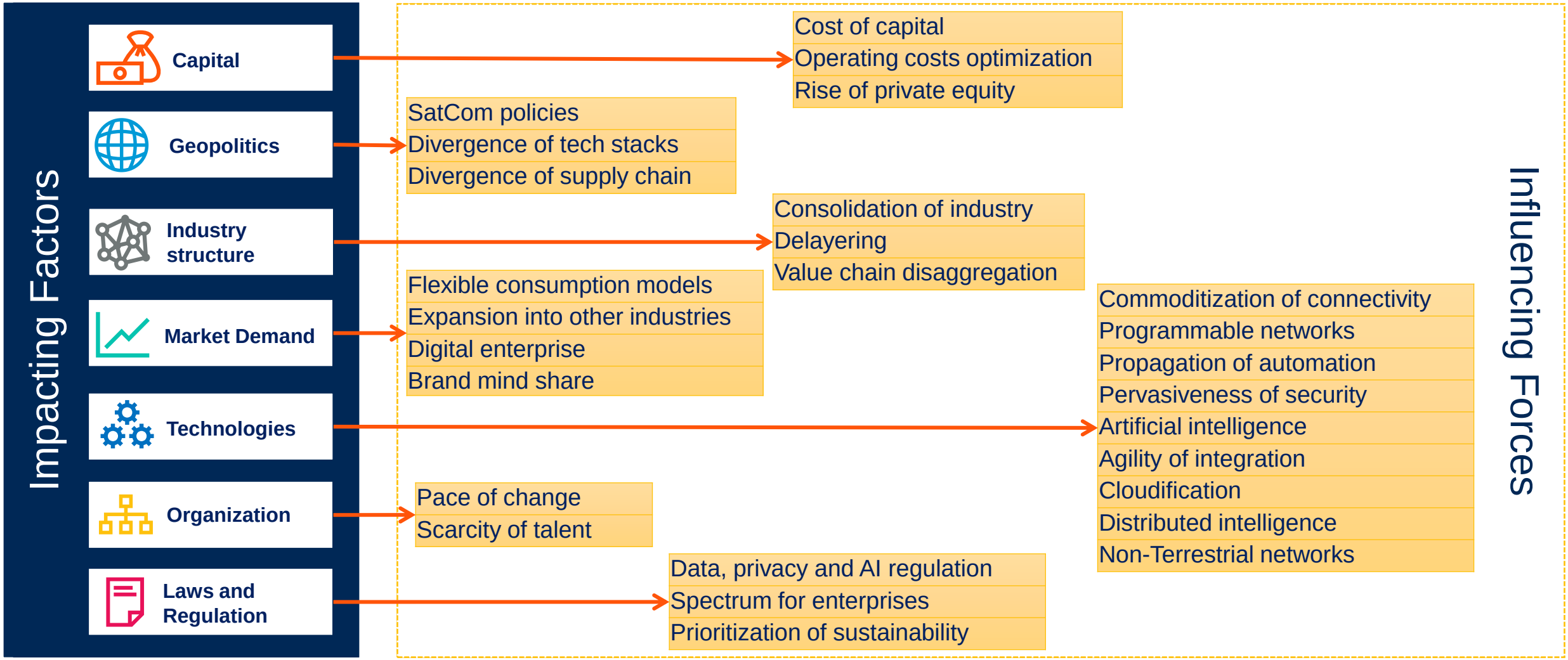
Laws and regulation means new policy demands and complexities in regulatory compliance.

Technologies

Technologies refers to application and employment of technologies for optimum results.

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Gartner's Methodology – Scenario Planning

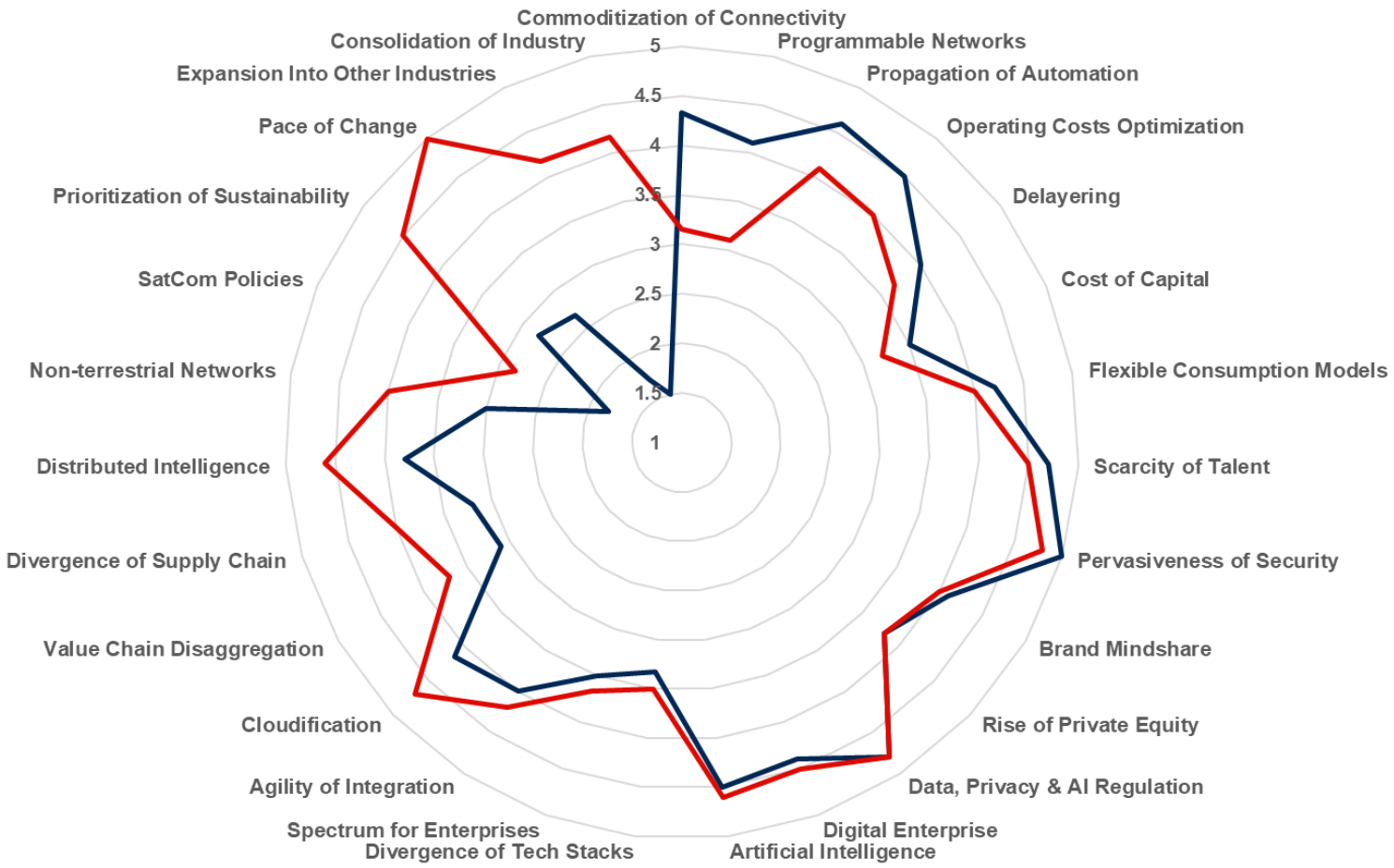


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Intensity and Scope of Influencing Forces

Intensity of Influencing Force

Scope of Influencing Force



There are three distinct areas in the spider chart here — areas where intensity is higher than scope, areas where they are of similar magnitude and areas where intensity is of lower magnitude than scope. These three distinct areas represent the distinct possibilities among many plausible futures, depending on which set of forces a CSP focuses its investments on.

Intensity > Scope: High inside-out forces leading to a future where a CSP is better-prepared for value-driven market.

Intensity ~ Scope: A CSP in tune with broader industry and society, leading to a future where a CSP is able to enrich the products and services of other industries.

Intensity < Scope: Outside-in forces leading to a future where a CSP develops capabilities to deal with emerging opportunities and non-traditional competition.

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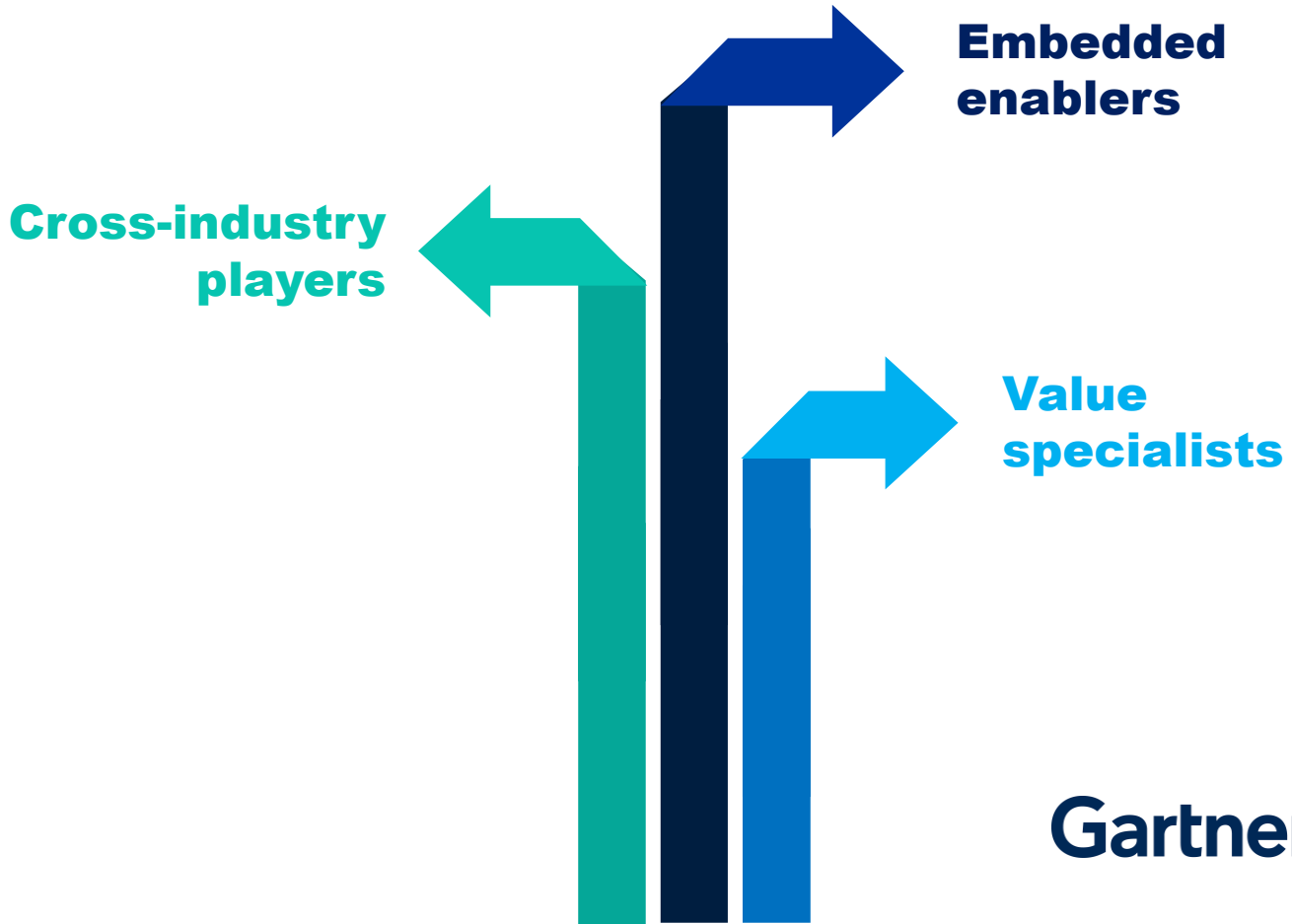
Check the instructions to do this analysis yourself.

Three Probable Futures Depend on Three Sets of Forces

CSPs response to the collection of forces will likely determine their future state(s)

Cross-industry players	Goes beyond connectivity and traditional telecommunications products and expands into other industries (FinTech, HealthTech, EduTech etc.)
Embedded enablers	Embeds connectivity or telecommunications solutions into products/solutions of other industries and enables smart products and services
Value specialists	Optimizes investments in networks and/or other assets enabling value delivery of connectivity or telecommunications solutions such as NetCos, TowerCos, Virtual Telcos etc.

A CSP can also operate in multiple future scenarios across its lines of businesses.



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Three Probable Futures : Key Characteristics



Cross-industry players

+ Communications industry embraces bold vision
+ Invests in cross-industry capabilities developing a portfolio of offerings and even brands
+ Orchestrators of ecosystems across industries
+ Drive distributed innovation
+ Strongly support openness and transparency
+ Customer demands shapes innovation
+ Champions societal concerns and issues
+ Strong influencers of regulations across industry

Embedded Enablers

+ Communications industry becomes enabler of other industries' visions
+ Invests in integrating with other industries
+ Active participants in various ecosystems
+ Provider of pervasive and resilient infrastructure
+ Focused on interoperability and agility for on-demand needs
+ Customer lacks influence on communications industry
+ Follower of societal changes
+ Adhere to own and other industry regulations

Value Specialists

+ Communications industry continues to be inward focused
+ Remains a connectivity provider
+ Orchestrator in narrow communications industry
+ Passive contributor to other industry ecosystems
+ Focus on value delivery through optimization
+ Evolves through changes in communication industry standards
+ Customer protectionism
+ Technology-driven
+ Champions of own industry regulations

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Three Probable Futures: Opportunities & Risks

	Cross-industry players	Embedded Enablers	Value Specialists
Opportunities	» Vertical industry solutions through co-innovation » Creativity with digital mindset and digital solutions » Open ecosystems (tech, business) + Collaboration » Composable Business » Mobile finance, eCommerce, pay as you go insurance	» On-demand, secure and cost-effective and tailored connectivity » Network APIs and network slicing » Intelligent Automation » Contextualized infrastructure » Composable Architecture » Hyperscaler collaboration » Driving synergies with adjacent markets	» Reliable conduit services » Efficiency and scalable utilization of assets » Enhancing CX » Simplification, Rationalization, Optimization » Incremental changes » Digitalization of services » Controlled localized offerings
Value Sources	» Data, insights, media, content » Digital-native solutions, Cloud-based comms	» External/industry focused network and connectivity	» Internal/CSP product-focused network and connectivity » Offloading nonvalue-adding assets
Risks	× Big and bold bet, Ambiguity, uncertainty × Scarce resources, talent × Higher cost of innovation × Digital natives leading already × Broader competitive threats × Distributed technology strategy	× Lack of differentiation in the long term × Disintermediation from services × Forces infrastructure divestment × Lack of long-term vision and investments × Narrow innovation focus × Losing end-customer relevance	× Commoditization, low margins × Tactical investments dominate × Telecom industry investments (spectrum, radios, etc.) dominate over other areas × CSPs as utilities with high-quality demand × Traditional mindset, slow change

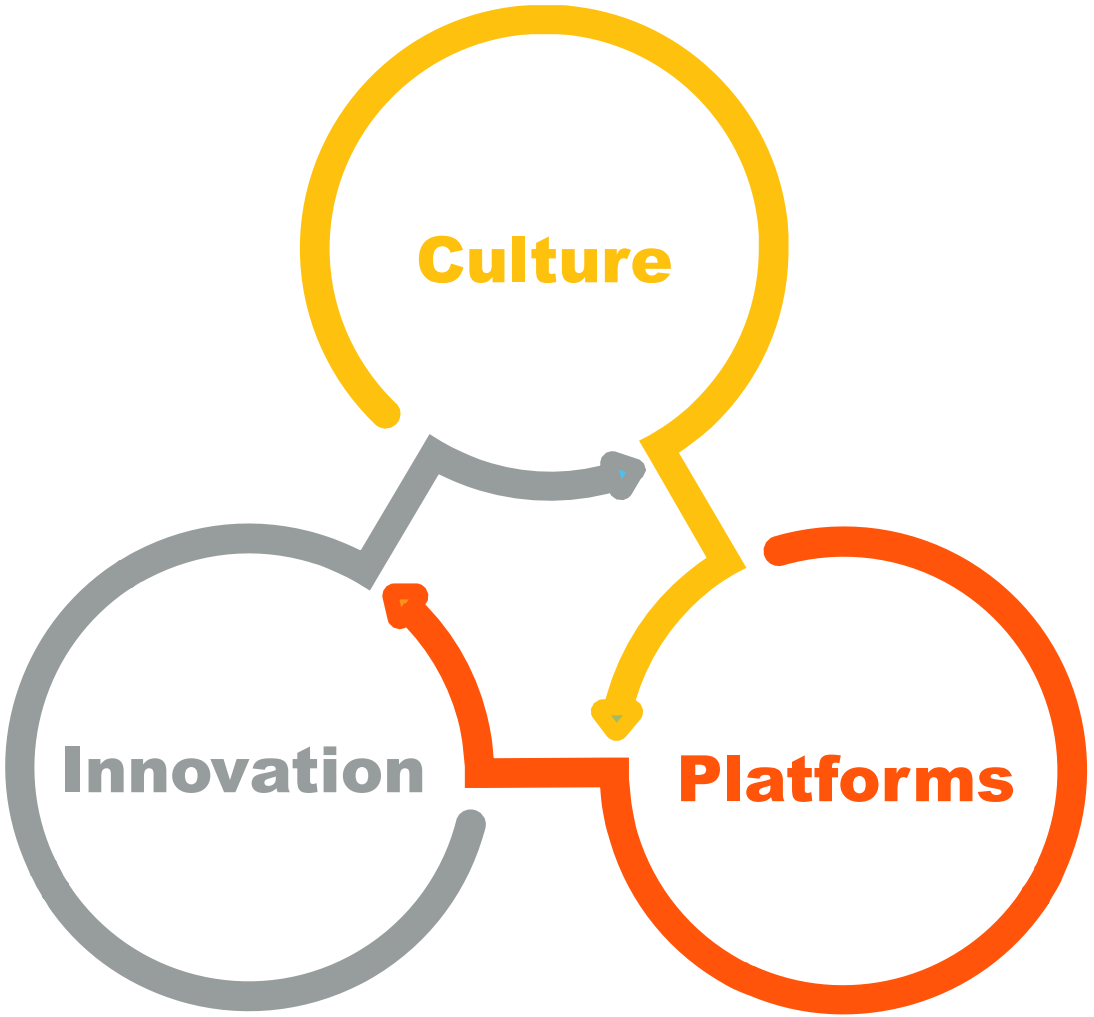
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CTIOs should target reinvention of their operating model through culture, platforms and innovation to deliver on the targeted future



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Reinvent Operating Model: Cross-Industry Players



	Structure	Attributes	Metrics Types
Culture	• Functional organization • Twin value streams (run the enterprise, run the business) • In-house expertise PLUS fusion teams • One tech (network and IT) organization	• Entrepreneurial • Risk-taking abilities • Autonomy of decision making • Flexibility and adaptability • Collective ownership • Design thinking • Change agent and ecosystem leadership	• Pace of change • Autonomy • Diversity and inclusion • Authority and ownership • Ideation
Platforms	Minimum requirements: • Business platform: Commerce and care • Enterprise platform: Operations, delivery and back-office • Engineering platform: development and testing	• Cost-benefit • Functionally independent • Easily integrated • Agile end-to-end process flow across platforms • Vertical scalability	• Collaboration • Continuous improvement • Data-driven • Outcome-delivery
Innovation	• Dedicated function • Funnel/pipeline driven • R&D (centralized innovation) • Executive oversight	• Experimentation • Technology scouting, M&A • Dedicated funds • Outcome oriented • Incremental	• Democratization of tech • Budget allocation • Innovation to products

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Reinvent Operating Model: Embedded Enablers



	Structure	Attributes	Metrics Types
Culture	• Matrix organization • Project-based • Cross-functional — fusion trams	• Team-work • Flexibility and adaptability • Moderate risk sensitivity • Distributed ownership • Ecosystem stewardship	• Collaboration • Trust • Agile learning
Platforms	Minimum requirements: • Commerce platform • Enterprise platform: operations and back-office • Integration platform: ecosystem interconnect • Partner platform: Suppliers	• Agile and API centric • Interoperability • Standardization • Ecosystem scalability	• Scalability • Configurability • Transaction performance
Innovation	• Open innovation (external environment) • Innovation labs (shared/collaborative)	• Collaborative • Use case/industry-specific • Stage-gate	• Partner-led innovation • Co-innovation • Channel innovation

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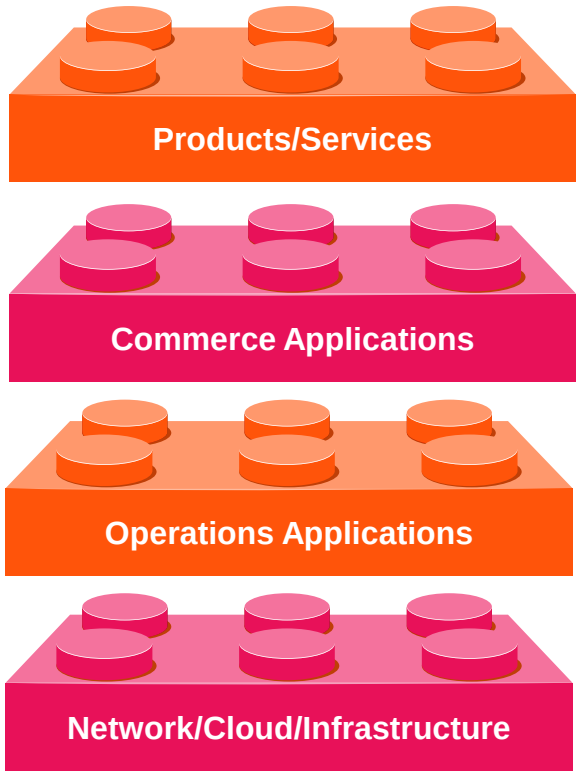
Reinvent Operating Model: Value Specialists



	Structure	Attributes	Metrics Types
Culture	• Hierarchical organization • Asset utilization/efficiency-focus • Product-based	• Centralized decision-making • High risk sensitivity • Long chain of command • Delegated ownership • Ecosystem membership	• Developing deep expertise • Lean process orientation
Platforms	Minimum requirements: • Enterprise platform: operations and back-office • Infrastructure platform for NetCo and service platform for Servco or VNOs	• Cost-conscious • Functionally independent • Agility (infra-centric or service-centric) • Horizontal scalability	• Efficiency • Reliability • Predictability • Security/trust
Innovation	• Closed innovation/skunkworks	• Project-based/specific • Closed/secrecy • Operational tech orientation	• Short-term/long-term impact • Patents

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Technology and Sourcing Considerations



	Cross-industry players	Embedded enablers	Value specialists
Products/Services	Investments in IPs for product and service, co-innovation with partners	Investment in service delivery applications, composability for embedding connectivity	Standard/value-delivery products through digital platforms
Commerce Applications	Investments in IPs for product and service	Flexible digital customer journey tailored for products and market segments, consumption analytics	Flexibility in commercial models, on-demand network and QoS
Operations Applications	Operations applications as platform for enterprise	Operations applications for end-to-end service orchestration	Automation for SLA management, efficiency and scalability
Network/Cloud/Infrastructure	Infrastructure is a solution component: Integration of infrastructure solutions in products	Infrastructure is the platform: Orchestration and exposure are key elements	Infrastructure is the product: best-of-breed and composability in network

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What Does It Mean for a Telco to Become a Techco?



Implications

- **Investment in R&D**
- **Skills and Talent:** Software Engineering Practice, Software Dev/Test/Release Management
- **Operating Model:** Agile, Flexible, CICD, DevSecOps
- **Sourcing:** Critical evaluation of build vs, buy
- **IP Management:** Outcome-oriented Innovation, Development, evolution and monetization of IP
- **Tech Stack:** Design, Evolution, Development, Integration – for differentiation and growth

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The Role of CSP CTIOs and Tech Leaders

Relationships with internal and external stakeholders will continue to define CIO/CTO/CTIO future role

The three profiles of tech leadership	55% of CIOs **Operator** IT delivers, business area sponsors	33% of CIOs **Explorer** IT delivers, business area collaborates	12% of CIOs **Franchiser** IT and business area co-own
Digital initiatives enterprisewide that meet or exceed outcome targets*	**43%**	**53%**	**63%**

Franchisers across the industries outperform the rest

Cross-industry players and **embedded enablers** futures demand the disposition of franchiser among tech leaders at telcos. Any other disposition would act as an impediment to the targeted future.

Value specialists future can be built through explorer disposition of tech leaders; however, a franchiser disposition is desirable in this case as well.

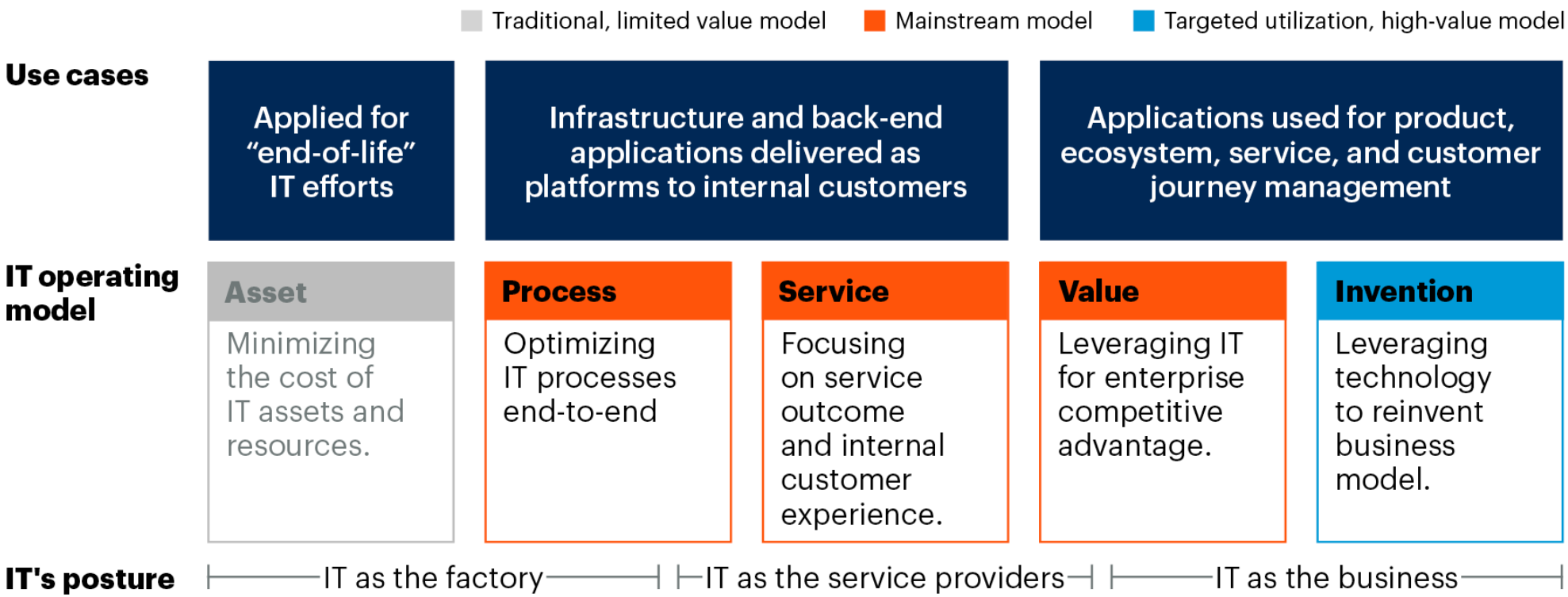
n = 2,457 CIOs and technology executives answering. Source: 2024 Gartner CIO and Technology Executive Survey
*Based on analysis of responses from: n= 618 CXOs outside IT. Source: 2023 Gartner CxO Strengthening Digital Leadership Survey

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IT Operating Model in CSPs

IT Operating Model

IT Operating Model Patterns Impacting CSPs



Source: Gartner

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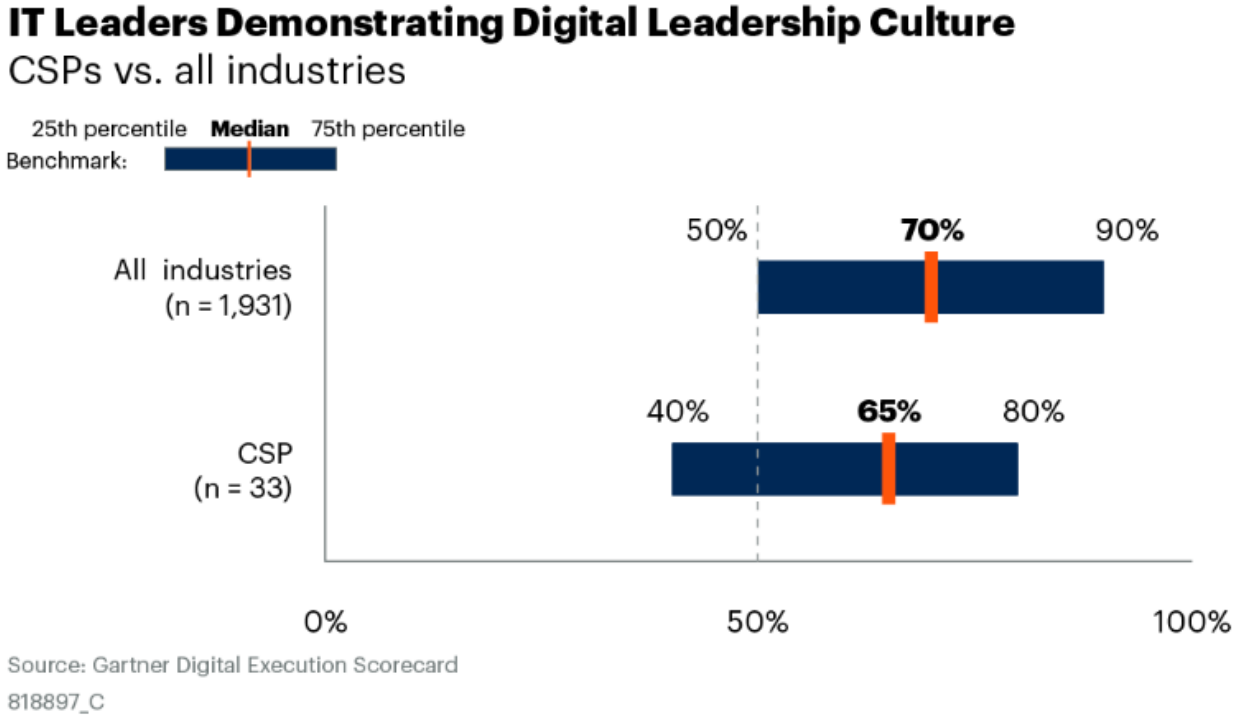
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Benchmark Your Performance With Digital Operating Model KPIs

KPIs to evolve to a digital operating model

- KPIs to track the adoption of best practices for digital enablement across the six dimensions of digital operating model-
  - Funding
  - Culture
  - Talent and Skills
  - Organization & Decision Rights
  - Sourcing
  - Ways of Working

Example KPI for Benchmarking



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Importance of Different KPIs For Realizing Techco Ambition

Digital Operating Model Dimension	KPI	Importance
Funding	Tech. Innovation/Experimentation Spending (%)	
	IT Run Spending Ratio	
Culture	IT Workforce Demonstrating Digital Culture (%)	
	IT Leaders Demonstrating Digital Leadership Culture (%)	
Talent and Skills	IT Workforce With Digital Skills (%)	
Ways of Working	Agile Delivery Execution (%)	
	Successful Software Releases (%)	
	Design Thinking Adoption (%)	
	Agile Methods and Technical Practices Adoption (%)	
Organization and Decision Rights	Product-Centric Organization Adoption (%)	
	Cross-Functional Business/IT Teams (%)	



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Recommendations for CTIOs and Tech Leaders



Cross-industry players

+ Prioritize platforms for operating infrastructure, services and lines of business.
+ Instill a startup culture of innovation, of entrepreneurship, and develop talent.
+ Invest in cross-domain innovation projects and accept risk and experimentation as a normal part of business.
+ Adopt composability across business and technology layers.
+ Stop doing everything on your own — position ecosystem collaboration and platforms strategy as primary drivers of growth and differentiation.

Embedded enablers

+ Make it easy to expose and share data, functionality, product components and other capabilities with the ecosystem.
+ Enable on-demand and as-a-service model for most of your capabilities.
+ Work with system integration and build expertise in system integration.
+ Scale capabilities and business processes.
+ Adopt technology composability for plug-and-play with the ecosystem.
+ Work with industry associations and adhere to de factor standards.

Value specialists

+ Pursue cost optimization and operational efficiencies.
+ Use platforms for efficiency gain and automation.
+ Enable business with capabilities and platforms to expand voice, connectivity and work-from-home UC offerings.
+ Accelerate digitalization of existing process and capabilities.
+ Strengthen your relationships with de jure standards bodies.

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Four main areas of focus for CSP growth



Platform business

- Economies of scale
- Cloud-consumption models
- API Economy
- Managed Services



Industry-verticals

- Industry-clouds
- OT credibility
- Consultative selling
- Consulting, integration and managed services



SMBs

- Digital channels and marketplaces
- Local Sis and MSPs as a key channel
- Customer journeys
- Multi-segmentation

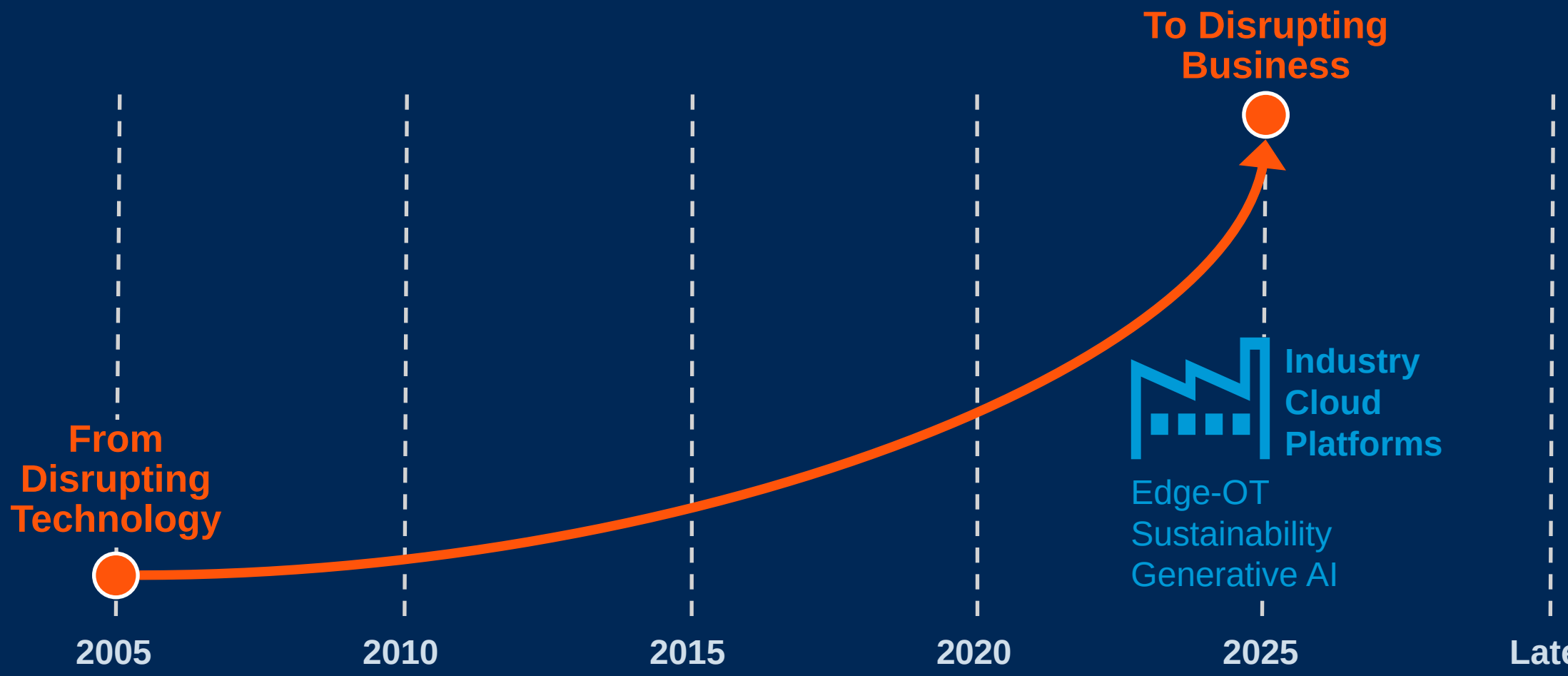


Partner ecosystem

- Co-opetition
- Enabling vs leading
- Agile channel partner programs
- Value proposition for the channel

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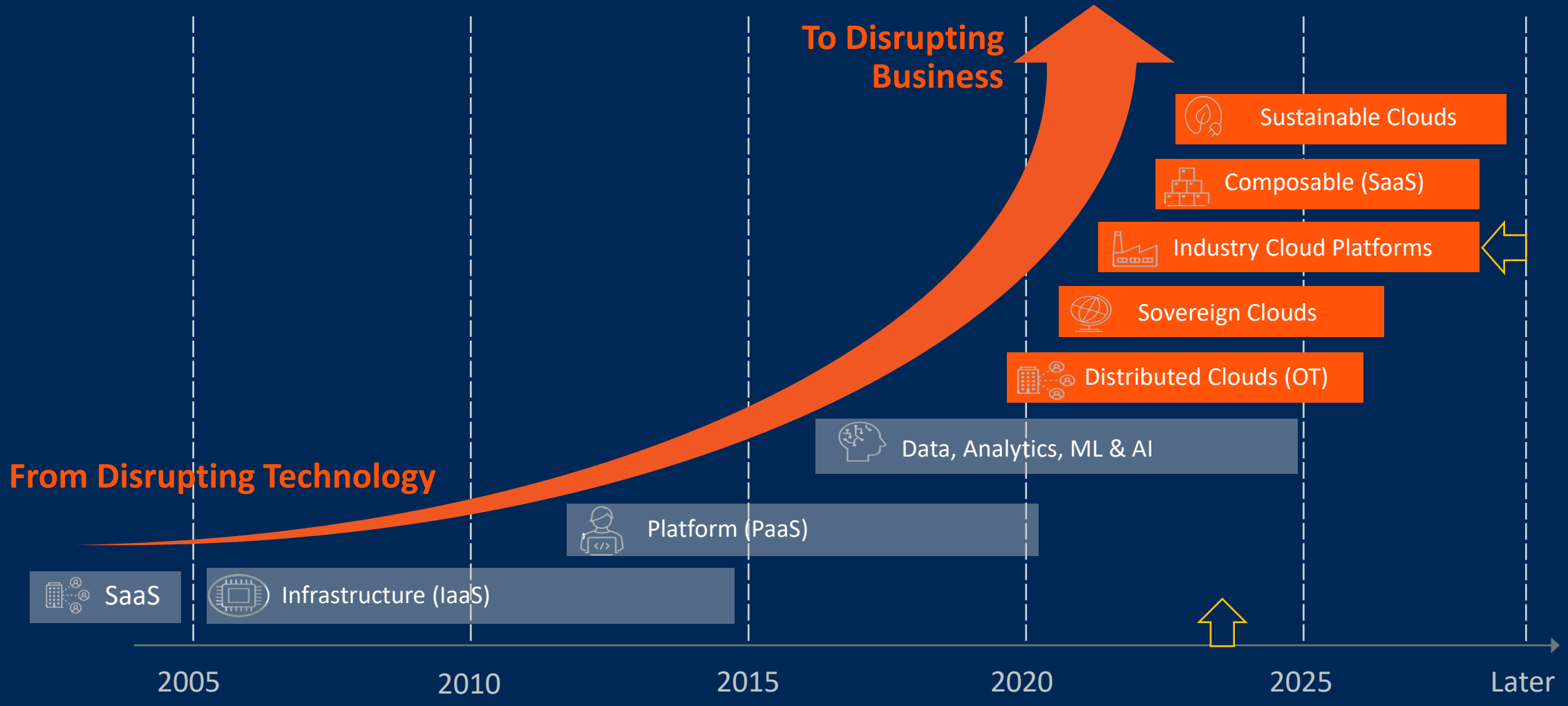
Industry Cloud Platforms Evolve the Cloud Value Proposition From Technology to Business Value



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Industry Cloud Platforms Evolve the Cloud Value Proposition from Technology to Business Value



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Industry Cloud Platforms

Industry Cloud Platforms (ICPs) address **industry-relevant business outcomes** by combining underlying **SaaS, PaaS and IaaS** services with **composable capabilities** into a whole product offering.

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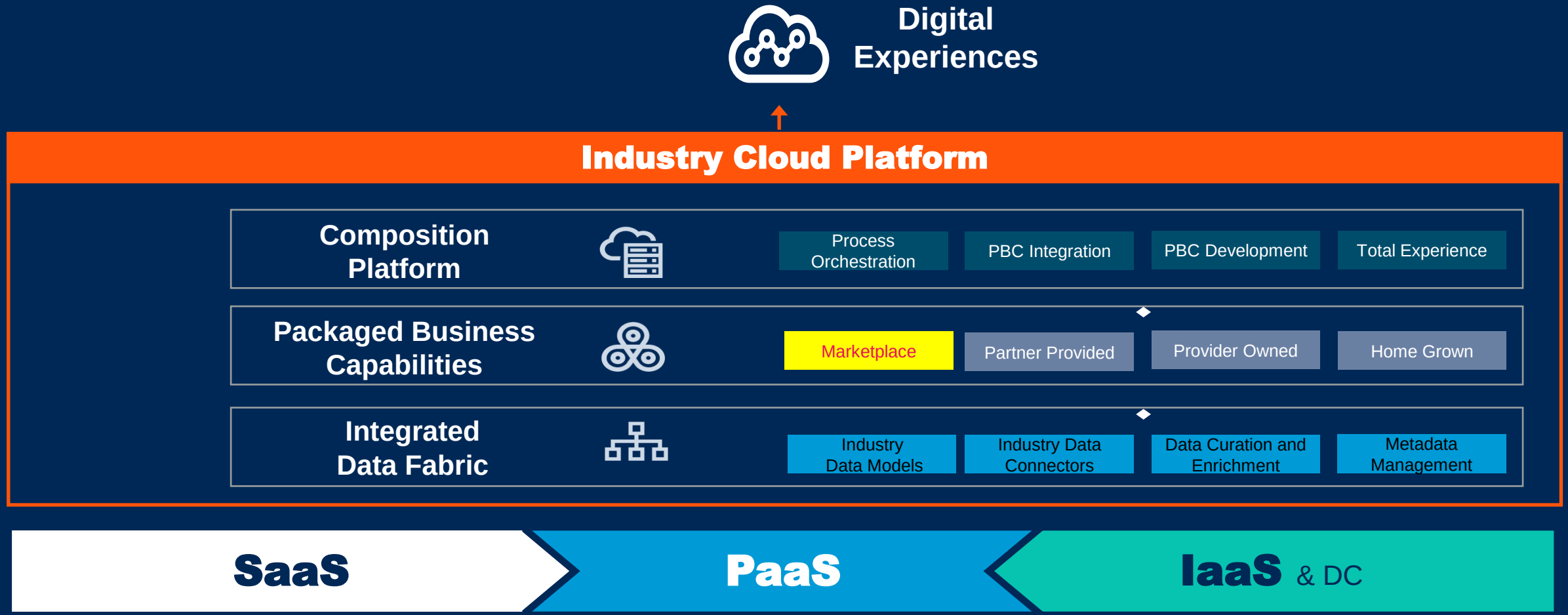
Think Exoskeleton Support



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Industry Cloud Platforms:
Architecture View



Source: Top Strategic Technology Trends for 2023: Industry Cloud Platforms (G00772891)

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ICPs Change Enterprise Cloud strategies

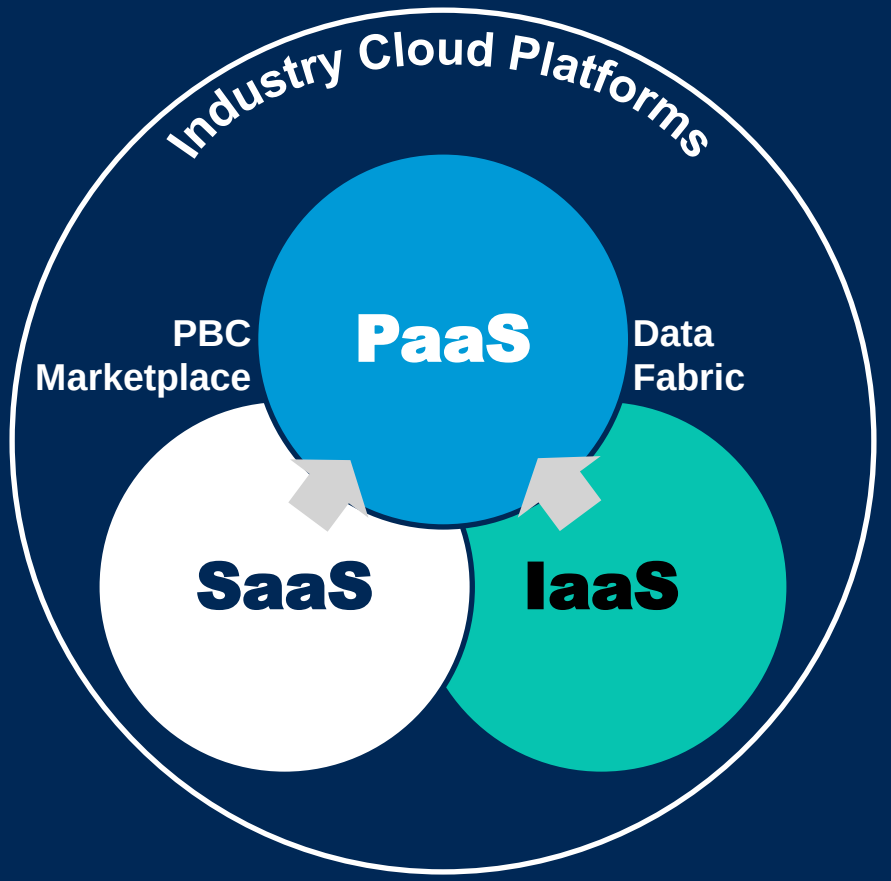


Siloed Cloud Strategy

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ICPs Change Enterprise Cloud strategies

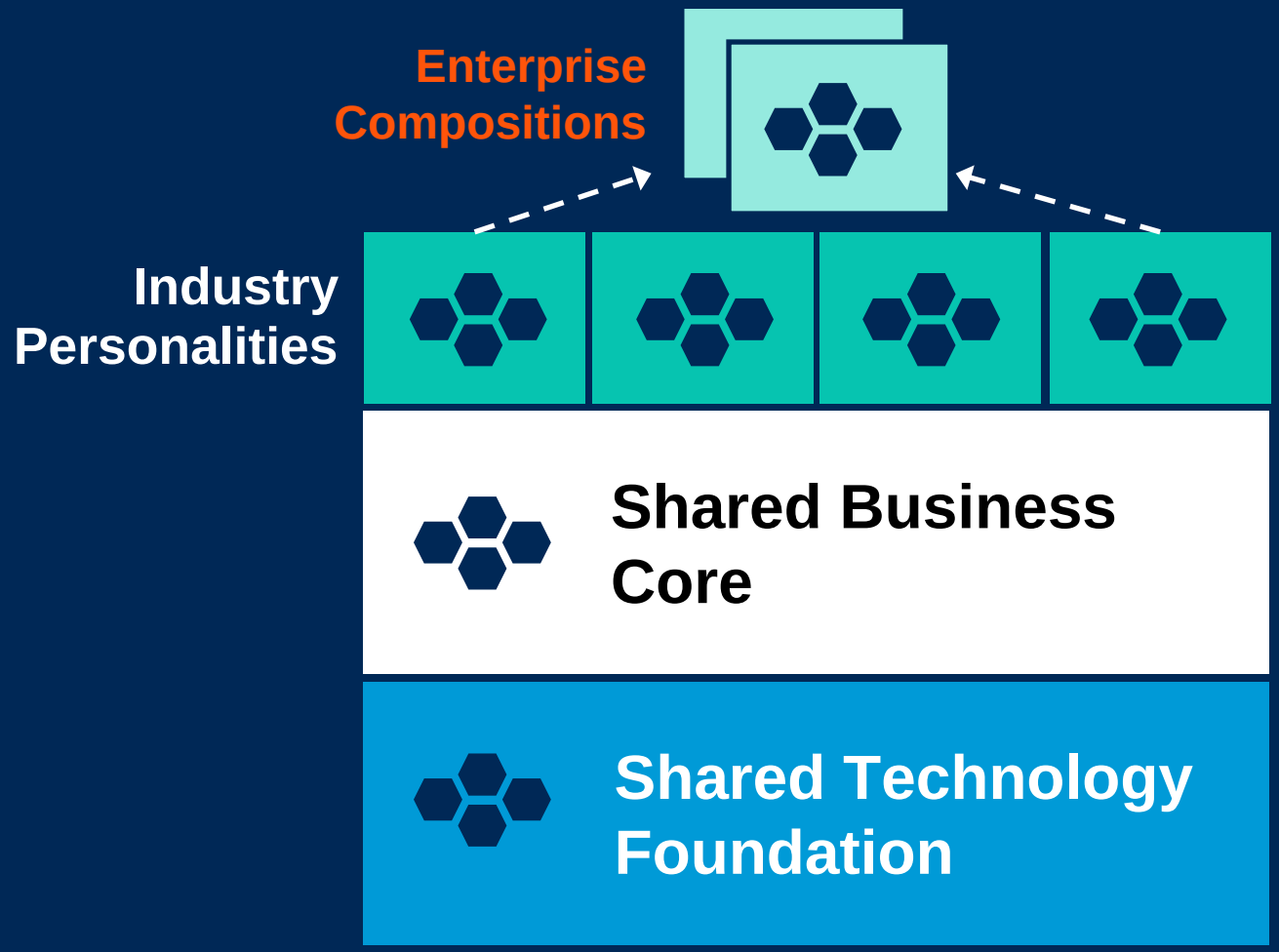


Holistic Cloud Strategy

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Composability Is a Key Enabler of ICP Benefits: Think Industry Personalities Not Industry Products





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Garter Quick Scan — ICP Offerings per Industry



322	13	49	6.5	70%
ICPs Identified	Industry Groups	Identified ICP Vendors	Average ICPs/vendor	Multi-Industry Vendors

Industry Cloud Platforms by industry: >40 | 11 to 40 | 5 to 10 | < 5

Manufacturing and Natural Resources (64)		Communications, Media and Technology (46)	
Healthcare & Life Sciences (41)	Retail (33)	Banking and Investment Services (34)	Government (24)
Power and Utilities (17)	Transportation (11)	Wholesale Trade (7)	Insurance (8)
Oil and Gas (5)	Others (19):	Multi-Industry	Professional Services
Sustainability	Non-Profit	Defence	Sports and Entertainment
…	…		

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A Variety Of Industry Cloud Platforms Are Emerging

322 ICPs Identified

13 (92 unique) Industry Groups

49 Identified ICP Vendors

6.5 Average ICPs/vendor

70% Multi-Industry Vendors

Hyperscale Cloud **Enterprise SW Vendors** **Industry Specialists** **GSIs** **CSP** **Enterprises**



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Example Case Study: The Żabka Group



The Żabka Group
Autonomous Shopping

- The Żabka Group operates over 9000 convenience stores in Poland and has been adding autonomous ‘Nano’ stores across the nation.
- These check-out free stores range from traditional brick and mortar shops, to store-in-store outlets and standalone vending containers.
- Żabka leverages Microsoft Cloud for Retail with technology developed by Microsoft partner AiFi. The instant data capture enables Żabka to quickly adapt—shaping expectations with our customers in a personalized way.

Source: Publicly available cases

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Gartner's ICP Adoption Survey — Key Findings

Adoption

70% of respondents have plans to adopt an ICP by YE26

Vendor Types

Hyperscalers (36%), Enterprise SW (29%) and Vertical Specialists(24%), while 58% use multiple ICPs

Criteria

Adaptability and in-depth vertical functionality matter equally

Strategy

50% Approach ICP like an exoskeleton

"Faster time to market in terms of implementation and adoption."

"Take advantage of capabilities that … we currently have to build out on our own"

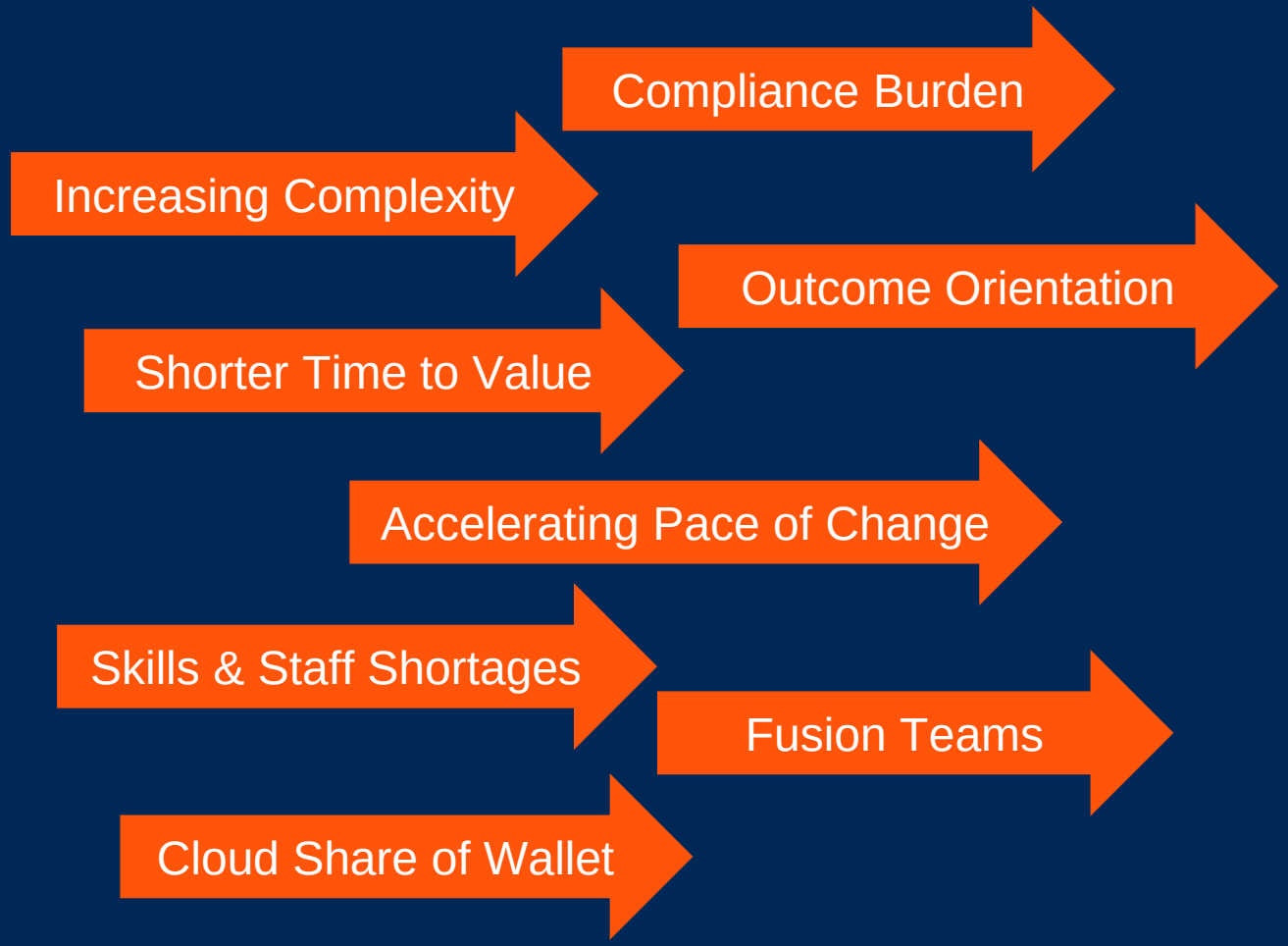
"Easier to use when certain factors are already included."

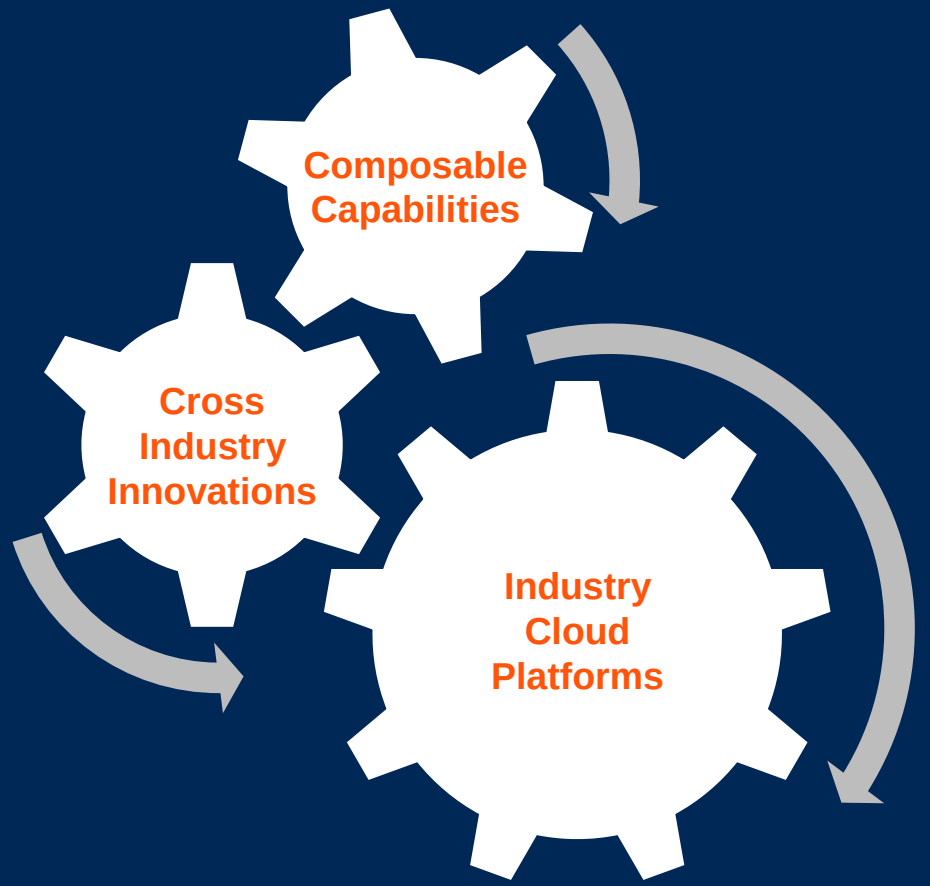
"It's always better to work with vendors who simply know or understand your business."

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Drivers and Enablers of Industry Cloud Platforms





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Industry-Relevant Business Outcomes

But what does that entail for different industries?
We asked! → Gartner's inaugural ICP adoption Survey

- Manufacturing Lists Automation As Main Benefit
- Retail Picks Customer Experience
- Agility Leads In Insurance
- Banking Points To Improved Compliance
- Healthcare, Life Sciences and Telecom Address IT Cost Efficiency

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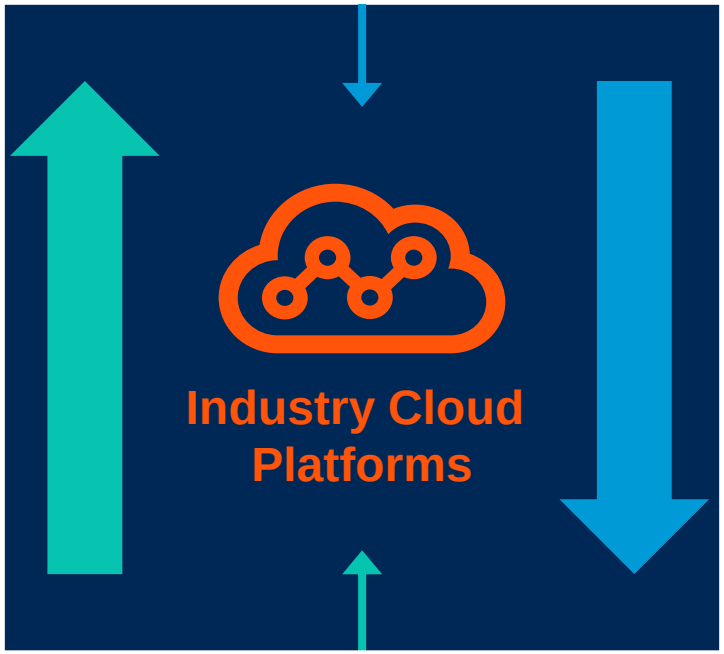
Two Approaches Toward Leveraging Industry Cloud Platforms

Bottom-Up Focus

8. Top Industry Challenges
7. Industry Subscription/Suite
6. Specific Vertical Products
5. Recommended Collection
4. Cross Industry Innovations
3. Industry Best Practices
2. Shared Cloud Platform
1. Technology Capabilities

Industry-In Approach

Industry Challenges → Cloud Technologies



Top-Down Focus

1. Top Industry Challenges
2. Industry Subscription/Suite
3. Specific Vertical Products
4. Recommended Collection
5. Cross Industry Innovations
6. Industry Best Practices
7. Shared Cloud Platform
8. Technology Capabilities

Cloud Technologies → Industry Challenges

Cloud-Out Approach

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Creating the *Beyond Connectivity* CSP Value Proposition

Each demands a different approach

Use composability to be able to deliver all three from unified (cloud) platform

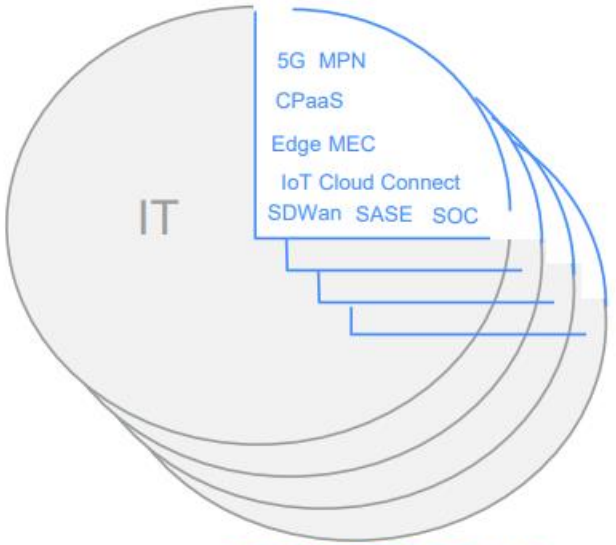
Individual CSP Solutions



Target: Consumer, B2B, MVNO, Wholesale, etc.

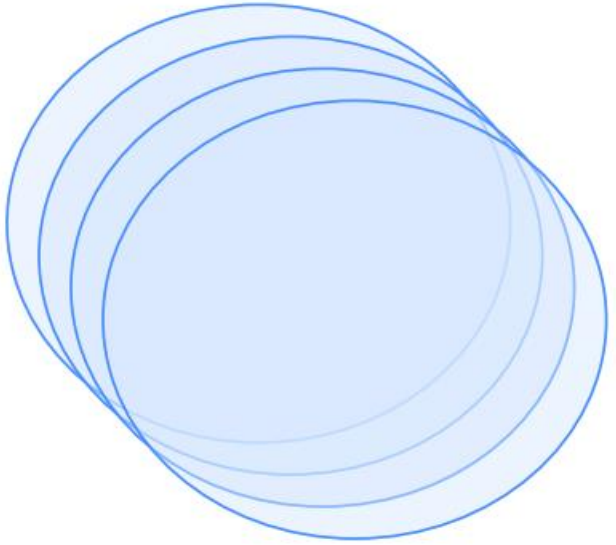
TODAY
+ new aspect NaaS

CSP Service Combinations



TOMORROW:
Targeted B2B Bundles

CSP Digital Industry Outcomes



Next: Selected ICP Propositions

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Industry Cloud Platforms

By 2027, CIOs Will Deploy Over 50% Of New Vertical Specific Capabilities Via Industry Cloud Platforms Geared To Directly Address Critical Industry Outcomes

Gartner Strategic Planning Assumption

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Action Plan for CTIOs



Short-term

Examine…

- Conduct a workshop with key stakeholders to evaluate your organization's position in relation to the three futures.
- Determine your current position and aspirations.
- Create views for the futures your organization aspires to.
- Evaluate culture, platforms and innovation in the current organization.

Medium-term

Define…

- Adopt an outside-in view and identify what success means.
- Identify the IT/tech capabilities needed to achieve the future states.
- Perform an IT/tech capabilities gap analysis with your current state.
- Perform a talent gap analysis.
- Identify KPIs to measure progress.

Long-term

Lead…

- Plan and prioritize steps to close gaps.
- Adjust your IT strategic plan and priorities to enable targeted future.
- Start implementing your IT/tech strategy.
- Measure KPIs to course correct.

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