



Telecom Consulting Global Market and Competitive Analysis 2011-2015 Executive Summary

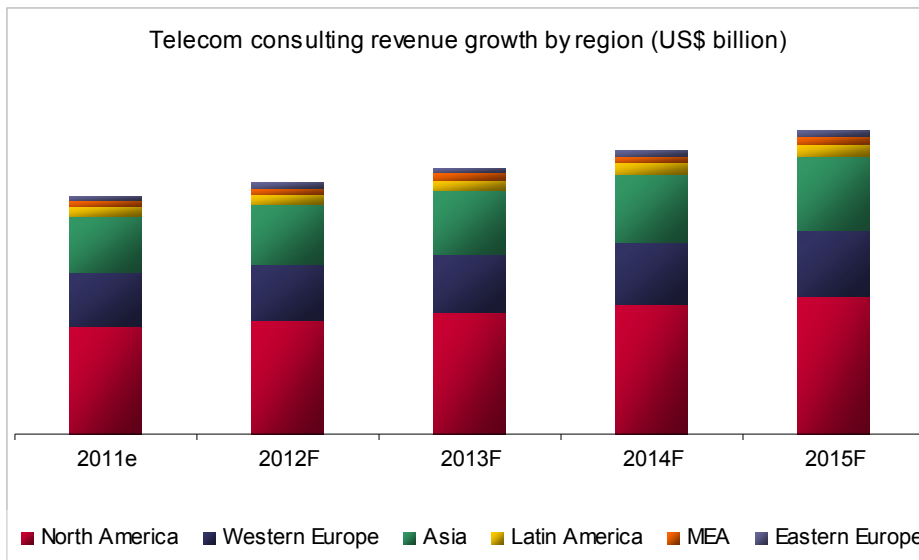
April 2012

Telecom consulting market sizing

The 2008-2009 recession has had a global impact in terms of revenue decline, and the recovery is expected to take longer than for prior recessionary cycles. In the current recovery situation, telecom consulting spend declined significantly in 2009 and stagnated in 2010, and we do not expect a return to double digit growth in the forecasted future. Nevertheless, many of the top 40 telecom consulting firm have put the worst behind them and had returned to positive revenue growth by the end of 2011. We therefore estimate telecom consulting revenue to have increased by 5.2% in 2011.

With many global telecom operators still suffering from slowing revenue growth and with saturation increasing in most countries and segments, we are not expecting global telecom consulting revenue spend to return to double-digit levels for the foreseeable future. Telecom consulting revenue is therefore forecasted to grow by a CAGR of 6.1% over 2011-2015.

On a regional basis, most regions have been impacted by the economic crisis, however some have recovered faster than others. Latin America, MEA and Asia are and will continue to be the fastest growing regions in terms of telecom consulting over the next 4 years, while regions such as North America and Western Europe have yet to return to pre-recession levels in terms of telecom consulting spend.



Telecom consulting opportunities

Based on the telecom trends and drivers discussed in the report, telecom consulting opportunities will be present in the following key field:

1. Technology consulting covering the launch and expansion of the following services:
 - 4G/LTE/FTTH
 - Mobile broadband
 - Cloud services
 - Mobile Video/content
 - Unified Communications
 - Mobile money and m-payments
 - Smart grid

2. Strategy consulting covering the following segment and subjects:
 - OTT players entering the voice market
 - Cable TV operators looking to offer voice services
 - Strategy development for telcos wanting to fight new entrants such as OTT players and Cable TV operators
 - Mobile/Fixed operators looking to expand their portfolio
 - M&A in emerging markets
 - Complex regulatory environments (how to deal with new technologies and unified communications)

3. Operational consulting to improve the following elements of operators' business:
 - Pricing models
 - Processes
 - Product launch

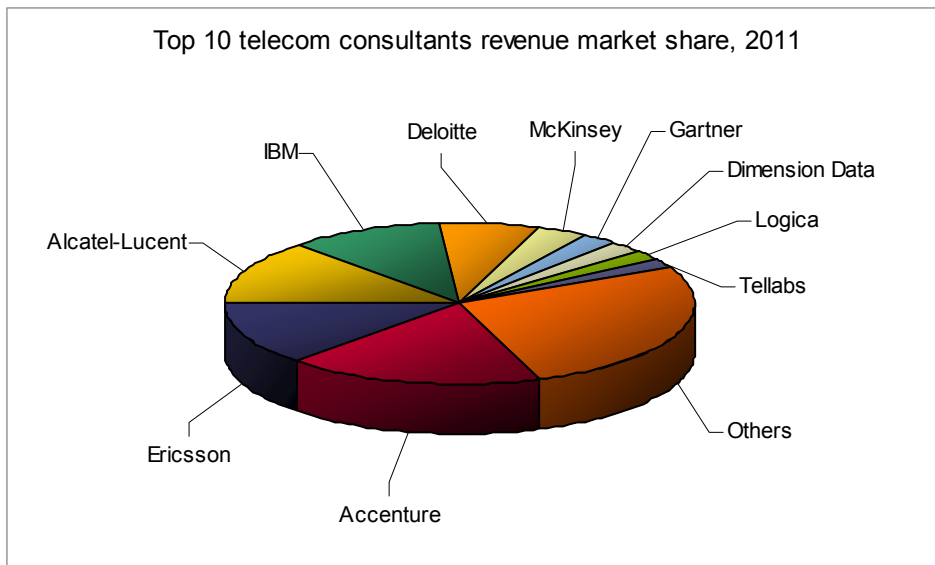
Competitive analysis

In 2011, telecom consulting revenues from the top 37 players accounted for 90.3% of the industry's total, this compared with 84.4% in 2008. The top 37 total telecom consulting revenue is now back to pre-recession level, after decreasing significantly by 10.3% in 2009, stabilizing with a growth of 4.3% in 2010 and 10.3% in 2011. The top 37 players suffered more than the average telecom consulting firms during the recession, but were quick to return to growth starting in 2010.

Telecom consulting revenue on average represents 15.0% of the top 37 total consulting revenue, an increase compared with 14.6% in 2009, at the worst of the recession for consulting firms. On the other hand, the top 37s' total consulting revenue accounted for 29.0% of their total revenue in 2011.

The unchallenged market leader continues to be Accenture. Its hold on the sector suffered during the recession with a decrease in market share in 2009 and 2010, however the company came back strongly with a growth of 18.4%, 20.6% and 29.3% in total revenue, consulting revenue and telecom consulting revenue respectively in 2011.

Now that equipment vendors have been included in our analysis, Ericsson has taken the second position, while Alcatel-Lucent, another equipment vendor, follows close behind in 3rd position.



Key consulting industry trends

- There is continued downward pressure on fees while consultants' salaries are increasing
- Growth in consulting demand is returning but stagnation is possible until the economic situation stabilizes.
- Growing demand of consultants able to inter-mix a wide range of skills in a unique solution.
- Cloud services are generating an increase demand for consulting support and may start to replace outsourcing services.
- M&A in the consulting industry is continuing and many are using this strategy to generate growth in a sluggish market.
- Acquisition and expansions in developing markets will continue to be one of the key drivers of consultants' revenue growth. A growing number of consulting firms will therefore look at emerging markets for growth.
- Customers' mindset remains focused on cost-cutting projects, yet an increasing number of companies are starting to implement growth oriented projects.
- Increased use of Online advisory/consulting services that are partly or wholly delivered using automated online technologies, usually as a component of a traditional consulting engagement.

Where is the market going and who are the top players?

This is the 6th edition of one of our most popular reports. This 96-page report will give telecom managers and consultants around the world the information they need to develop winning and informed strategies to compete and succeed in the resurgent telecom consulting environment. This exclusive report provides you with an in-depth analysis of the world's Business, IT and Telecom consulting markets, including revenue forecasts, trends and opportunities on a region-by-region basis.

It also presents the 2008-2011 telecom consulting revenues and market shares of the top 35 telecom consulting firms. Our competitive analysis looks at telecom consulting firms' revenue, workforce and revenue/employee growth and market share by revenue tier, by consultancy category and individually.

The report also includes a detailed profile of 37 key telecom consulting players, supplying you with the following information for each consulting firm:

- 2010-2011 Total revenue, consulting revenue & telecom consulting revenue
- 2010-2011 Number of employees, Revenue/employee
- World presence, Service offering, Target customers

Finally, the document provides the list of the world's top 169 telecom consulting firms by consultancy category, with a link to their web site. Companies profiled in our competitive analysis are:

A.T. Kearney	Deloitte	Oliver Wyman
Accenture	Detecon	Oracle
Alcatel-Lucent	Dimension Data	Ovum
Amdocs	Ericsson	Pyramid
Analysys Mason	Forrester	PA Consulting
Atos	Gartner	PwC
BCG	Getronics	Sofrecom
BearingPoint	Hitachi consulting	Swedtel
Booz	IBM	TCS
BT Advise	JTEC	TCIL
Capgemini	Logica	Tellabs
CSG	McKinsey	TMNG
Cybercom		

The Telecom consulting market and competitive analysis 2012 is a 96-page report supported by 51 data-rich tables and charts.

More information:

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For more information or to order this report, please contact us at:

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or visit the following page: <http://www.hottelecom.com/telecom-consulting-report.html>

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EQUIPMENT VENDORS

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STRATEGY FIRMS
BIG 4
IT AND MANAGEMENT CONSULTANTS
TELECOM CONSULTING SPECIALISTS
MARKET RESEARCH CONSULTANTS
EQUIPMENT VENDORS
LAW FIRMS
INVESTMENT BANKS
TELECOM SOFTWARE COMPANIES
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