

A woman with long dark hair, wearing a grey blazer over a light blue shirt, is looking down at her smartphone. She is in a dimly lit office environment with blurred computer monitors and warm ambient lighting in the background.

Global Industry Scan

How CSPs are adapting
to the new normal

NOKIA

At the start of the COVID-19 pandemic, communications service providers (CSPs) were under intense pressure just to keep their networks up and running. Now with pandemic-related traffic volumes and subscriber behaviors becoming the “new normal” for the foreseeable future, what comes next?

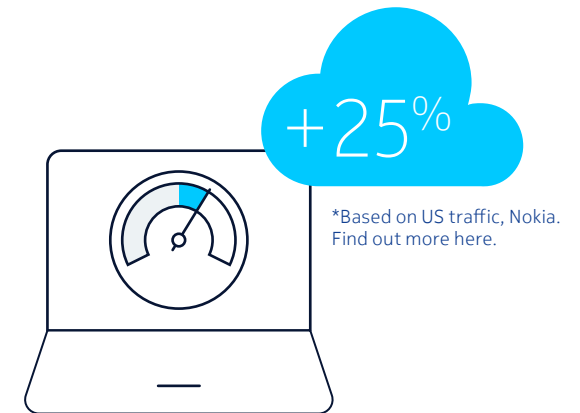
CSPs must adapt and scale their operations to meet dynamic, fast-changing customer requirements and network conditions — while also setting the stage for long-term growth in the 5G era. As they pursue those goals, they appear to be focusing on four key areas: subscriber retention and growth, subscriber self-service and self-care, service adaptation, and enterprise opportunities.

Subscriber retention and growth

Converged charging and billing platforms are giving CSPs the flexibility and scalability they need to quickly develop and launch temporary promotions to meet their customers' pandemic-related connectivity needs. These offers can also entice customers to upgrade devices and plans so they use more of the CSP's network services.

Giving customers a boost when they need it most

CSPs around the world have modified their consumer and business offerings during the COVID-19 crisis. Some have provided larger usage allowances for residential and mobile data plans, increased maximum throughput speeds when subscribers exceed their data limits, or enabled zero-rated access to healthcare or streaming video services. To support the resurgence of voice traffic, some CSPs have made calling free for essential workers such as hospital staff or are offering free international calls to select countries. And others have given enterprises temporary increases in data limits or free access to videoconferencing applications to support remote working.



Aggregate internet traffic volume above pre-pandemic levels



to roll out a promotion to 20 million subscribers

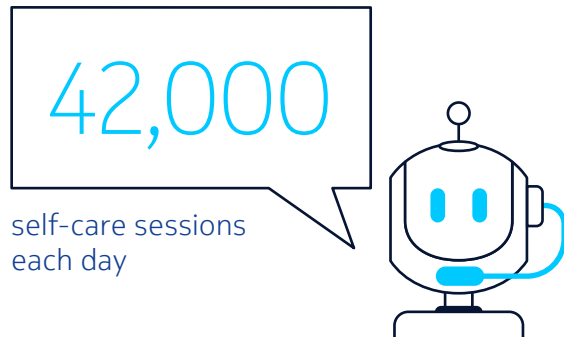
Deploying new promotions at high speed

In North America, one CSP was able to apply a temporary promotion to more than 20 million subscribers in less than four hours. It achieved this while throttling the amount of information being sent to third-party downstream systems, preventing them from being overloaded.

A modern customer engagement platform also helped a Middle Eastern CSP implement and launch its “#StayHome” promotional campaign in just over three hours on a weekend, ensuring it was the first to reach out to customers in its market with a pandemic-related offer.

Subscriber self-service and self-care

Finding ways to stay connected to customers is critical, especially as physical retail spaces remain closed or have reduced operating hours. CSPs are placing a greater emphasis on self-service portals and e-commerce platforms to sell and deliver their products during this time, while autonomous customer care solutions are reducing the load on call centers and the need for truck rolls.



Reducing contact center overload

By adopting a new service management platform, a Tier 1 CSP in North America was able to overcome one of its biggest challenges: siloed applications across channels that limited its ability to use a single support process for any device or customer type.

By integrating and automating more than 370 APIs and 125 systems on a single platform, the CSP can now run customized, omni-channel workflows that guide subscribers easily through the self-care process.

The platform also allows for chatbot-enabled support channels, freeing up contact center agents to take on more complex queries.

A better in-home experience means fewer truck rolls

Swisscom's customers were struggling with the complexity of their ever-expanding home networks. Because the CSP had limited visibility into each subscriber's living situation, it could provide only reactive, on-site support, sending technicians to address Wi-Fi configuration or coverage issues. That's all changed with Swisscom's greater focus on data analytics.

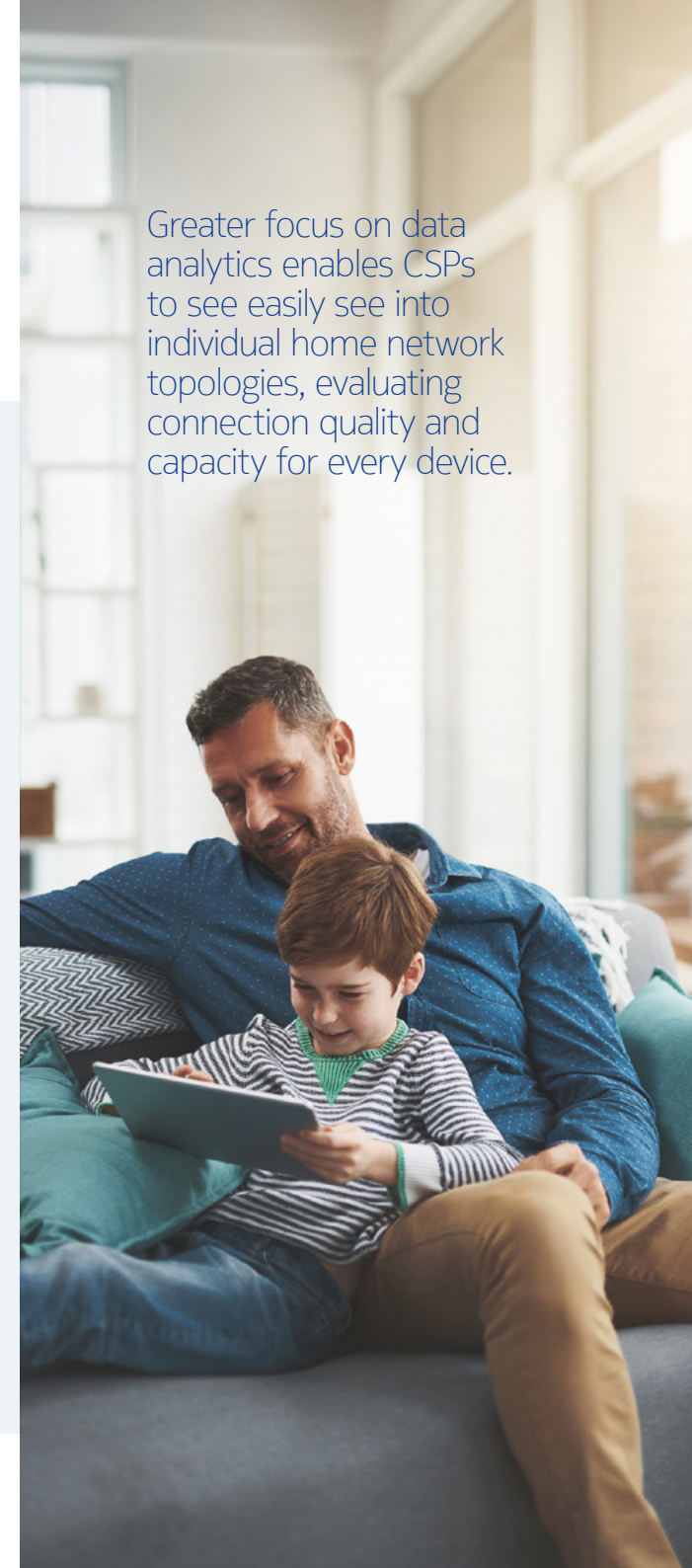
Now it can easily see into individual home network topologies, evaluating connection quality and capacity for every device. These insights are stored in a centralized data lake for fast recognition of potential errors and instabilities in subscribers' home networks.

Meaningful, proactive recommendations are then delivered automatically through assisted care and self-care channels, minimizing the need for truck rolls.



"first time right" recommendations in early trials

Greater focus on data analytics enables CSPs to see easily into individual home network topologies, evaluating connection quality and capacity for every device.



Service adaptation

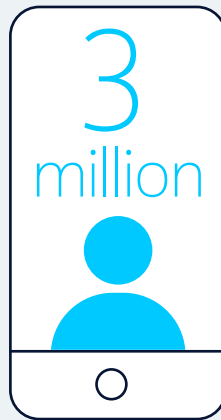
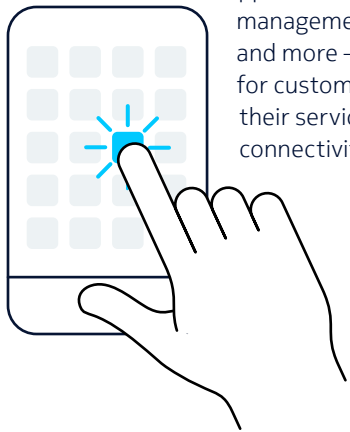
During the pandemic, customer requirements and network conditions can change practically overnight. To respond accordingly, CSPs have had to be flexible and agile — and unafraid to try new sales approaches, launch new digital brands or adjust long-planned services to better satisfy their customers' needs.

Attracting new customers with digital brands

Many CSPs worldwide have launched digital brands to capture new, digitally savvy customers with lifestyle-oriented apps and services. With connectivity more important than ever during the pandemic, and with all-digital services easy for new customers to sign up for and install, digital brands have continued to be strong customer acquisition tools in the COVID-19 era.

In some cases, launching digital brands has also allowed CSPs to target their existing customers with new digital offerings that support mobile

app-based self-care, account management, bill payments and more — making it easier for customers to adjust their services and get the connectivity they need.



subscribers expected to sign up by year-end



On-the-fly changes keep a long-planned launch on track

Rakuten Mobile started building Japan's newest wireless network in mid-2018, with the full-scale commercial launch set for April 8, 2020. In March, the CSP began offering pre-launch "UN-LIMIT" plans — but as the pandemic spread, it quickly realized the plan's data caps and transmission speeds wouldn't be able to meet the growing demands associated with remote working and online learning.

So just a few days before launch, Rakuten Mobile unveiled "UN-LIMIT 2.0", boosting roaming data limits from 2GB to 5GB per month. With its swift and flexible reaction to changing market conditions, the CSP successfully entered the market as planned, with one million subscribers signing up by the of June and an expected three million sign-ups by year-end, despite the closure of many Rakuten retail outlets.

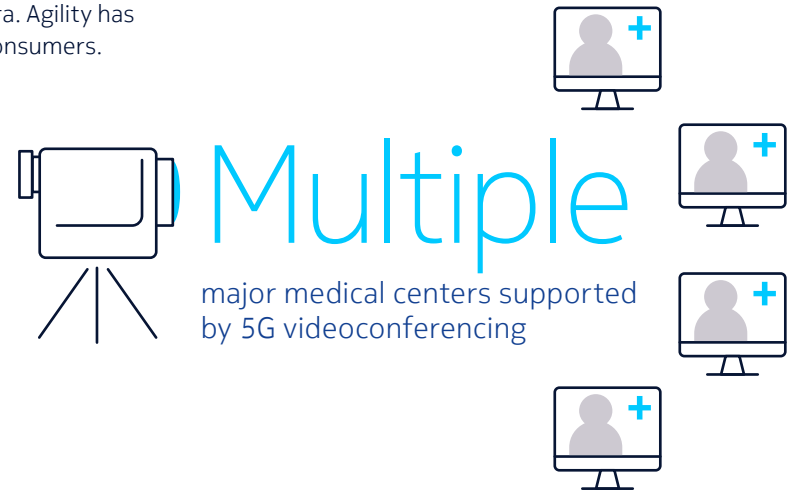
Enterprise opportunities

As they respond to the immediate needs created by the pandemic, CSPs are still keeping an eye to the future, laying the foundation for the enterprise-focused use cases and B2B2X partner ecosystems that will define the 5G era. Agility has been the key to working effectively with partners to co-create innovative new offers for businesses and consumers.

Telemedicine as a value-added service

Telemedicine has taken on new importance in the pandemic. Some CSPs are working with healthcare providers and public health agencies on direct-to-consumer services, either co-branded or under the CSP's name only, to meet the need for online/app-based virtual doctor consultations.

In Cambodia, Cellcard provided doctors at four major medical centers with a 5G-powered videoconferencing platform, making it possible to provide real-time care, counselling and therapy to patients anywhere in country over mobile devices. CSPs can add value by making services like these free or zero-rated for customers, or by making them convenient to use by adding any subscription charges directly to customers' existing bills.



online gaming platform in Cambodia

Making it easier for people to stay home

Telemedicine isn't the only area where Cellcard formed new partnerships to better serve customers during the pandemic. With people urged to stay indoors due to COVID-19, the company accelerate its plans to provide Cambodia's gaming community with its own online gaming platform like those in other Asian markets.

In collaboration with world-leading game developers, the PlayGame app allows users on any mobile network to play their favorite games on the go. Cellcard also partnered with some of Cambodia's top influencers and streamers to promote the platform's eSports tournaments, with real prize money awarded to players at the top of the leaderboards.



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The COVID-19 pandemic has highlighted the need for CSPs to be more flexible, agile and creative. That adaptability will be key to attracting new customers and staying profitable now and in the years ahead.

Why Nokia?

Nokia offers a robust portfolio of solutions to help CSPs overcome their COVID-19-related challenges. Learn more about how to deliver the extraordinary in the COVID-19 reality at www.nokia.com/covid-19

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