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# The Digital Gold Rush: Telcos' Blueprint for B2B Success

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# Introduction

The telecom industry is undergoing a transformation, with B2B leading the way. Our research, based on insights from 100 senior IT and business executives at global telcos, reveals that B2B revenue is projected to rise from 18% to 35%, signaling a major shift.

As businesses worldwide embrace digital transformation, demand for advanced connectivity and IT services is surging. Telcos, with their robust infrastructure and expertise, are well-positioned to meet these needs. However, success in this lucrative market requires rethinking enterprise strategies, building differentiated capabilities, and redefining brand positioning.

Building on our earlier report, which emphasized the strategic importance of B2B for telcos, this edition delves into how telcos can excel in the B2B space. It explores their approaches to capturing opportunities, overcoming challenges, and thinking like tech companies—strengthening enterprise offerings, attracting small businesses, and fostering ecosystem collaboration.

This report is a clarion call for CSPs to rethink, retool, and reimagine their B2B strategies. To win in this new, brave B2B world, telcos need to shake things up. They've got to think like tech companies, stay ahead of the curve, beef up their large enterprises game, woo smaller businesses, and play nice with others in the sandbox. For any telco looking to thrive in the digital age and capitalize on the B2B gold rush, this report offers the critical insights needed to stake their claim and potentially reshape their role in the global digital economy.

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# Key Findings



## B2B Goldmine: Unlocking Growth Across Segments

Large enterprises are set to dominate future B2B revenue, contributing 35%. Medium-sized and small businesses follow closely, with shares of 21% and 19%, respectively. Segments like government and SOHO (Small Office/Home Office) are pivotal in shaping a comprehensive B2B strategy.



## Seizing Opportunities with Advanced Technologies

While advanced technologies gain focus, core connectivity remains fundamental. Telcos are prioritizing 5G (42%) for business innovation, alongside cloud services (41%) and core connectivity (39%), emphasizing the need for a balanced approach to integrate cutting-edge tech with reliable connectivity.



## AI: Redefining the B2B Telecom Experience

AI is emerging as a game-changer, with 74% of providers identifying it as key to unlocking new revenue streams and 71% planning AI-driven solutions within two years. From predictive issue resolution to adaptive solutions and actionable insights, AI is helping telcos deepen and enrich B2B customer relationships.



## Innovation, Customization, and Security: The Trifecta for Success

Innovation leads the race to win B2B clients, cited by 44% of telecom leaders as the primary success driver. Customizable solutions (38%) and advanced cybersecurity (35%) are also critical to meeting enterprise needs in this competitive market.



## Overcoming Hurdles: Turning Challenges into Opportunities

Outdated IT systems (35%) and talent shortages (33%) remain significant hurdles for telcos. To address these, 47% are partnering with tech providers for infrastructure upgrades, while 35% are leveraging hyperscalers to offer scalable solutions tailored to business needs.

# Striking Gold: The Next B2B Digital Rush for Telcos

B2B is becoming the backbone of telecom growth, with revenue from this segment expected to nearly double in the coming years. Spark New Zealand is a compelling example, with 30-40% of its revenue derived from B2B—well above the global average for most telecom companies. This success story highlights the crucial role that the enterprise business plays in driving future growth. For telecom providers, the takeaway is clear: investing in innovative solutions and forming strong partnerships with businesses isn't just a strategy—it's the key to staying ahead in an evolving market.

## Beyond Big Deals: Unlocking B2B Growth Across All Segments

While large enterprises will represent the largest share of B2B revenues (35%), this alone does not guarantee sustainability. Opportunities should be distributed among medium-sized, small, SOHO, and government segments. To succeed, telcos must provide tailored, flexible solutions that meet the unique needs of each customer segment while promoting a portfolio approach and maintaining a balanced overall business model.

## Telcos as Transformation Catalysts: Powering Retail, Finance, and Healthcare's Digital Future

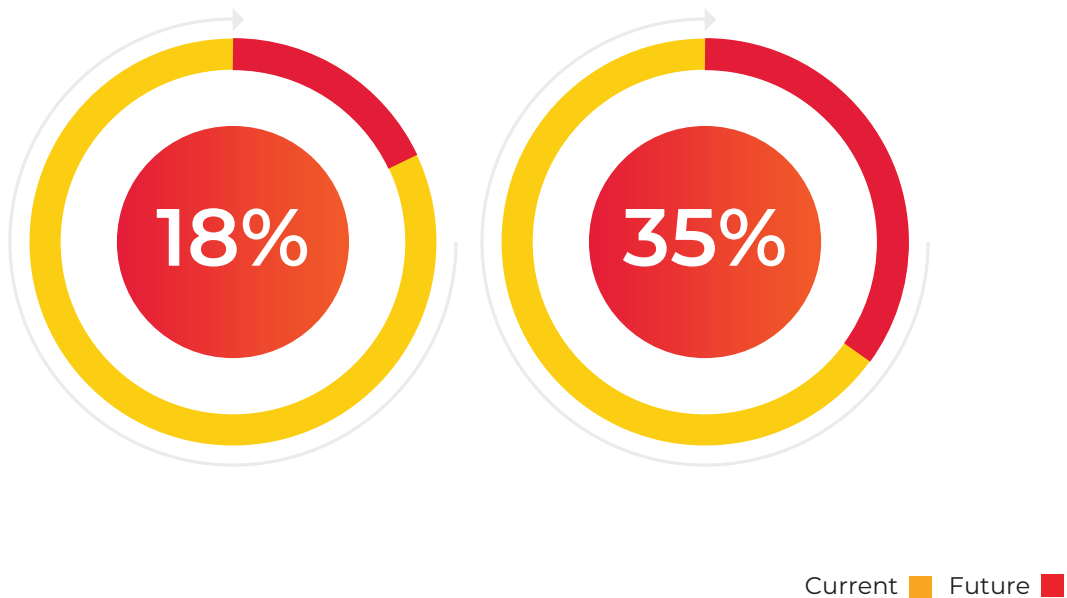
Telcos' future lies in collaborating with industries to accelerate digital transformation and empower them to succeed. According to 24% of respondents, retail offers the greatest growth opportunities. Telcos can assist retailers in enhancing their e-commerce platforms and improving in-store connectivity to seamlessly integrate online and offline shopping experiences.

The next sector is banking and finance, holding a share of 22%, making it ripe for fintech disruption. In this domain, telcos can serve as key enablers as financial services become more digitally accessible through digital banks and fintech solutions. Healthcare ranks third, with 20% of respondents seeing the most potential. As healthcare transitions into a more digital and connected field, telcos can deliver the high-capacity, secure networks required to transfer vast amounts of real-time data and support new healthcare technologies that enhance patient outcomes. BT and AT&T have already developed vertical offerings for banking and financial services, healthcare, manufacturing, retail, and public services sectors to set themselves apart and address specific industry needs.

**Figure 1 (A)** Source: Comviva Research Centre

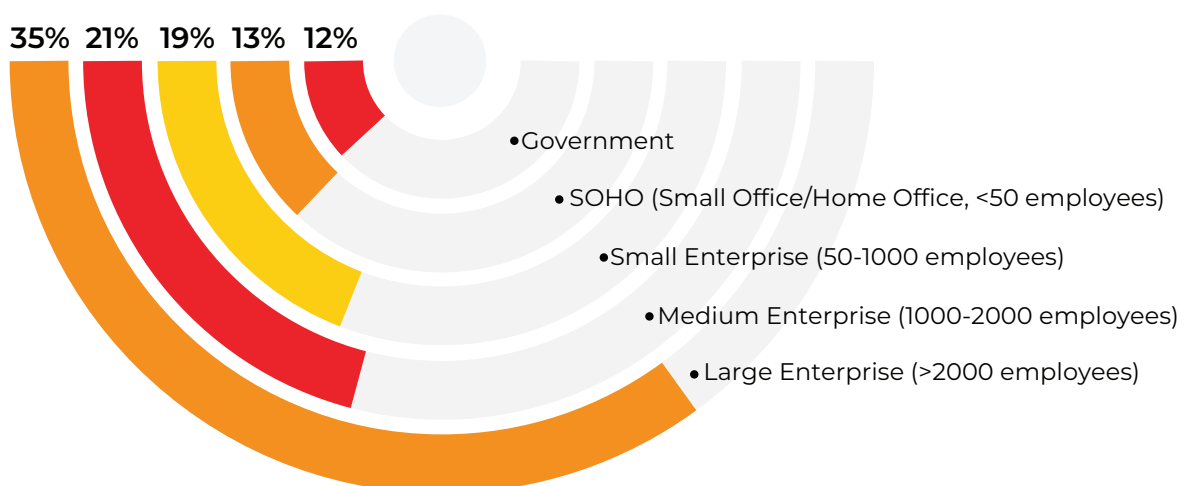
## Expanding B2B Opportunities Across Enterprise Segments and Industries

Percentage of total revenue currently generated from the B2B/Enterprise segment - Current vs. Future



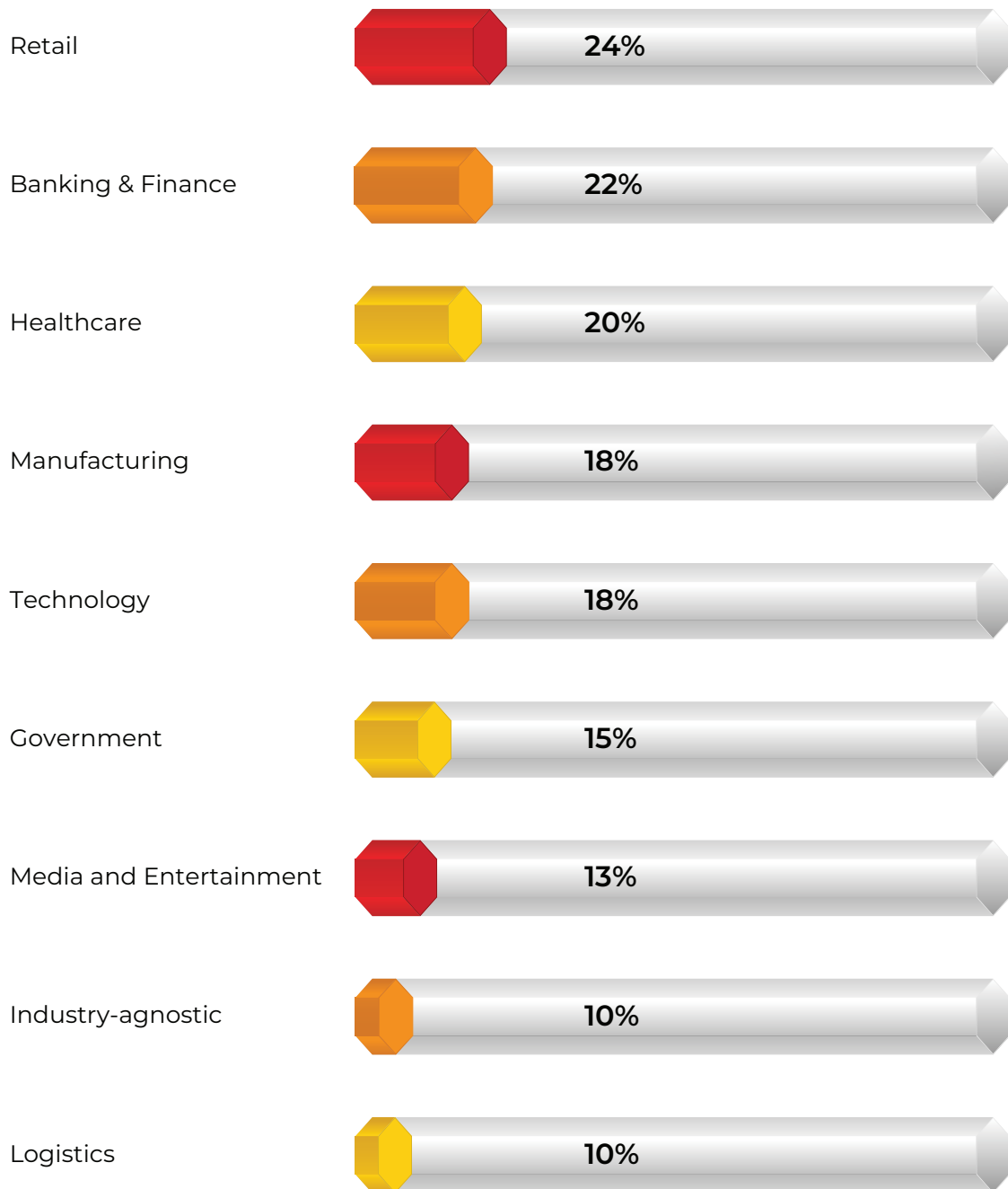
**Figure 1 (B)**

Percentage of expected B2B revenue telcos foresee deriving from enterprise segments 35%



**Figure 1 (B)**

Industry verticals that are expected to deliver the highest growth potential for B2B solutions/ services



# Blueprint for Telco B2B Domination: Three Pillars for Future Success

Drawing from our survey insights, we have crafted a blueprint for telco B2B domination, comprising three core areas. First, it's about embracing cutting-edge technologies like 5G and IoT while keeping sight of what they do best: providing reliable connectivity. Second, AI takes center stage as the driving force behind growth, assisting telcos in innovating and streamlining operations. Finally, it's about creating strategies to achieve customization at scale, enabling telcos to meet the unique needs of diverse B2B clients efficiently.

## 1. Capturing New Opportunities While Building on Strong Foundations

On one hand, embracing cloud, 5G, and AI is essential for staying relevant and competitive in the B2B market. On the other hand, they need to continue doing what they do best: providing reliable connectivity.

### ★ Core Connectivity: The Foundation Never Goes Out of Style.

As much as new tech grabs headlines, core connectivity remains essential for businesses. Telecoms know this well—39% recognize core connectivity as a major driver of future B2B revenue. Verizon is doubling down on its 5G Ultra-Wideband Network, providing businesses with the speed and reliability they need for their digital applications. By building on its core offering of reliable connectivity, Verizon is opening the door to new business opportunities across industries.

### ★ Cloud Solutions: Leading the Charge for Growth.

Cloud services are now the foundation for many businesses looking to scale and innovate. Telecom providers have a golden opportunity to offer cloud infrastructure (IaaS), platforms (PaaS), and software (SaaS) to their customers, helping them adapt and grow in an increasingly digital world. In fact, 41% of telecom companies believe that cloud-based solutions will boost their B2B revenue (see Figure 2). AT&T has seized this opportunity by teaming up with Microsoft Azure to provide integrated cloud services to businesses. This partnership enables AT&T customers to quickly scale their operations on Azure's cloud infrastructure while benefiting from AT&T's robust network capabilities.

### ★ 5G for Business: Driving Innovation.

5G is set to transform how businesses operate by enabling faster speeds, lower latency, and new possibilities such as IoT and real-time analytics. No wonder 42% of telecom providers view leveraging 5G technology for business applications as a key priority in their B2B strategies. T-Mobile is making 5G more accessible through its 5G Business Internet service, which offers businesses fast, reliable internet without needing traditional fiber connections.



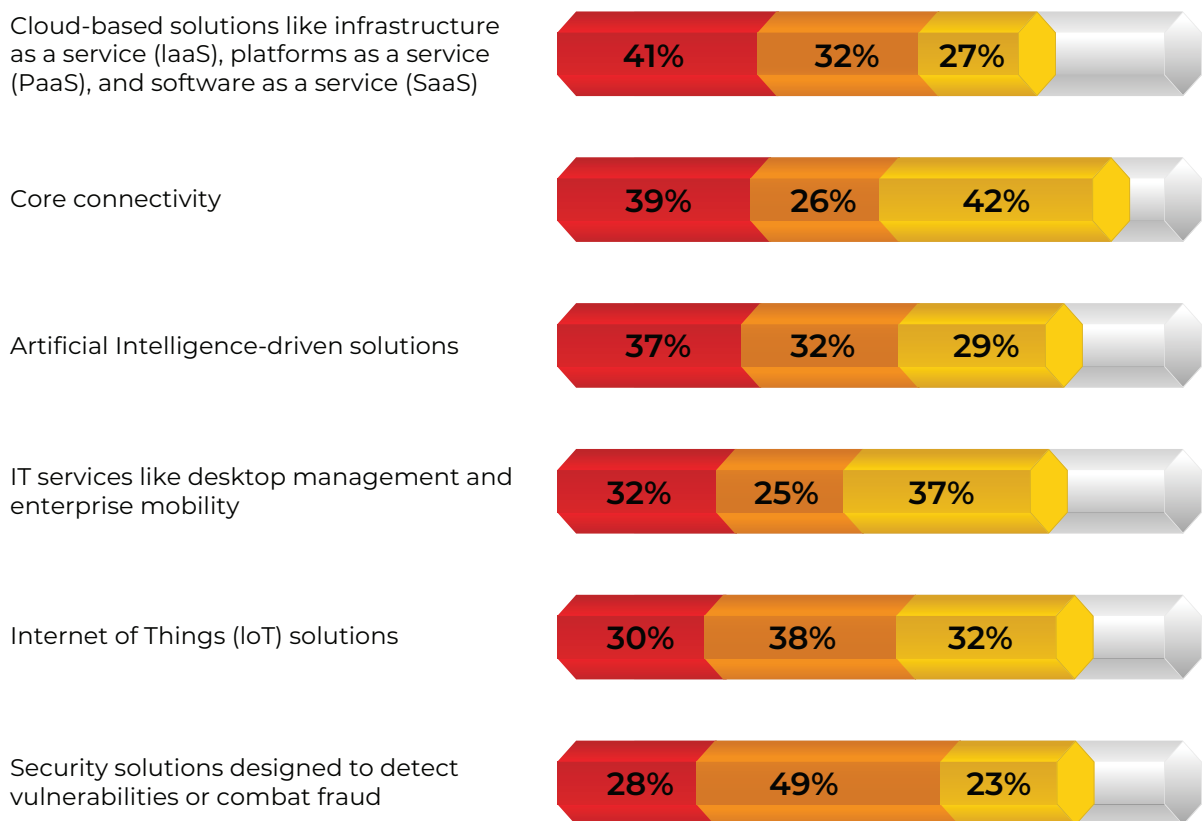
★ **Enhancing Data Analytics: Turning Data into Actionable Insights.**

With the explosion of data in today’s world, businesses need better analytics to stay competitive. 38% of telecom providers focus on enhancing data analytics and insights to help their B2B customers make better decisions. Vodafone utilizes its vast data network to offer Big Data services that enable businesses to optimize operations and improve customer engagement. With Vodafone’s data analytics tools, businesses can gain a deeper understanding of their customers, enhance service delivery, and make more informed decisions.

**Figure 2 (A)**

**Seizing Opportunities and Setting Priorities**

Most significant opportunities to boost B2B revenue in the future

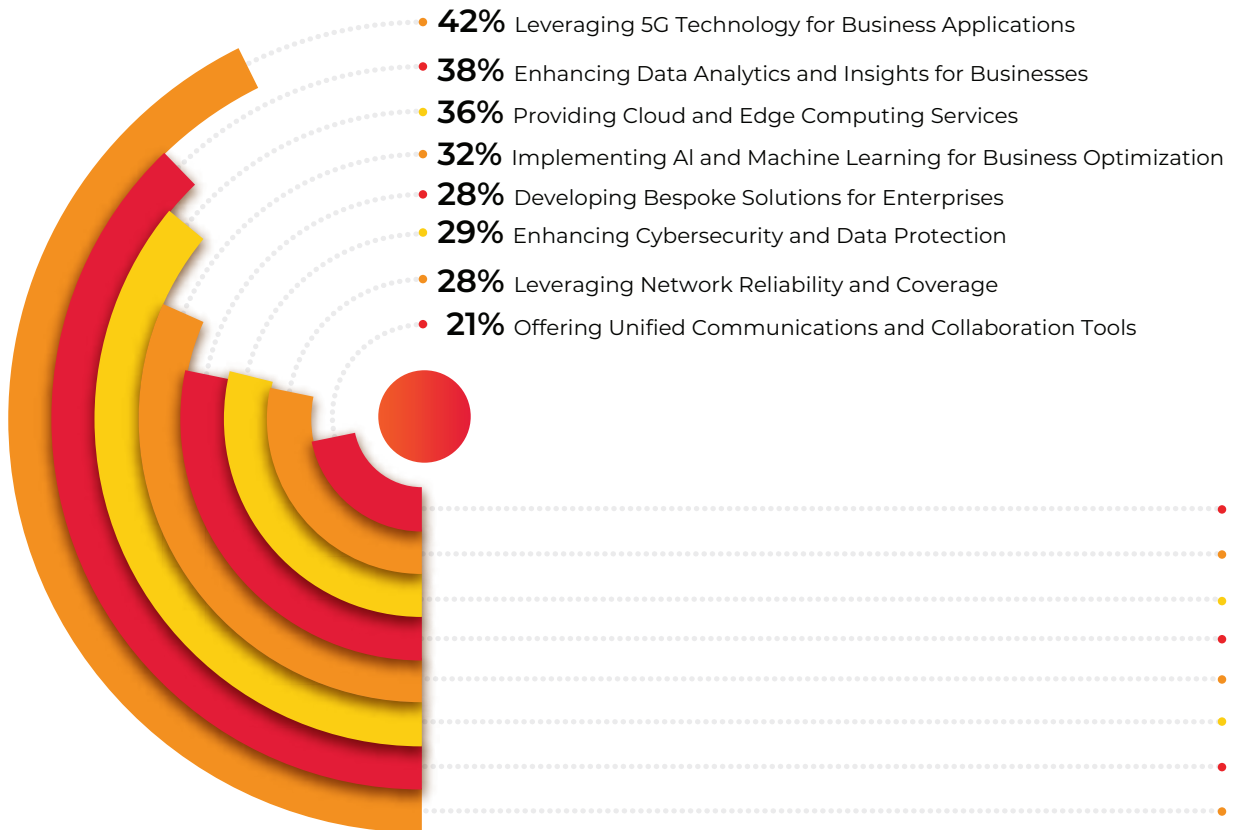


Rank 1 ■ Rank 2 ■ Rank 3 ■

**Figure 2 (B)**

## Expanding B2B Opportunities Across Enterprise Segments and Industries

Percentage of total revenue currently generated from the B2B/Enterprise segment.



## 2. AI: The Next Frontier in Transforming the B2B Telecom Growth

Artificial Intelligence is emerging as a game-changer for telcos, with 74% of industry leaders recognizing it as critical for unlocking new revenue streams. Even more striking, 71% of telcos plan to roll out AI applications in their enterprise services within the next two years. These statistics underscore how essential AI is becoming in shaping the future of telco B2B strategies. (see Figure 3)

### ★ Unlocking New Revenue Opportunities.

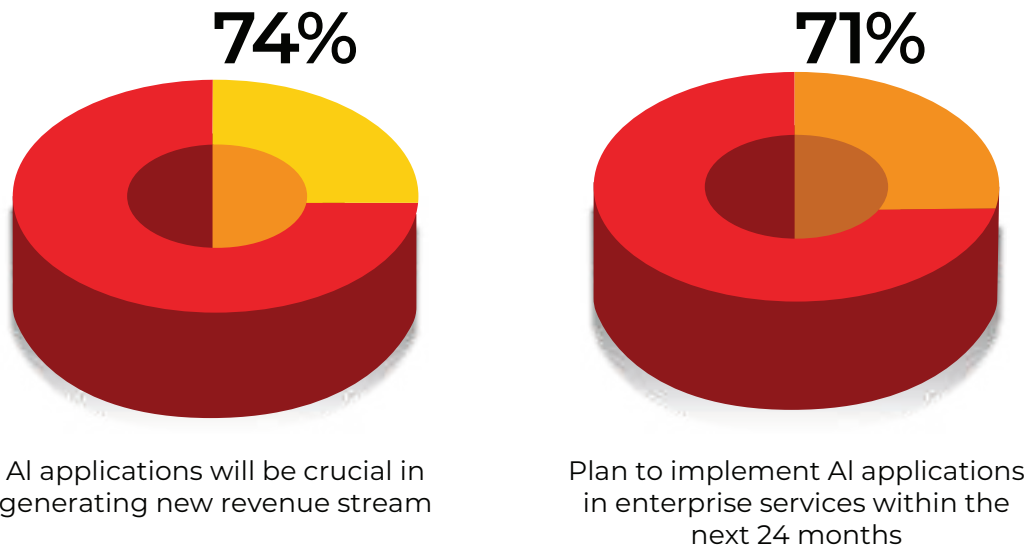
Telcos are using AI to help businesses uncover new ways to grow, offering services like predictive analytics, intelligent automation, and real-time insights. These tools not only improve how businesses operate but also create fresh revenue streams for telcos by enabling their clients to work smarter and achieve more.

### ★ Helping Businesses Run Smarter and Safer.

From optimizing networks to detecting fraud and improving cybersecurity, AI applications give businesses the tools they need to operate efficiently and reliably while staying ahead in an increasingly complex digital world.

**Figure 3**

### From Connectivity to Intelligence: Telcos' Redefining the Future with AI



### 3. The Formula for B2B Telecom Success: Innovate, Adapt, Protect

The B2B telecom market is ripe with opportunities, but only for providers willing to innovate, customize, and secure their offerings. The stakes are high, and the competition is fierce. Our survey sheds light on the top factors that will drive success in this competitive market.

**★ Innovative products and service offerings.**

At the top of the list, 44% of executives point to innovative products and services as the biggest drivers of success (see Figure 4). Businesses seek more than just reliable connectivity; they demand next-generation solutions that help them stay competitive, from 5G-enabled services to AI-powered tools. For instance, AI-powered communication tools, such as automated customer service bots or predictive analytics for customer engagement, can significantly enhance customer experiences and drive revenue growth.

**★ Comprehensive and customizable solutions.**

Customization is the next major factor, with 38% of telecom leaders emphasizing the importance of offering comprehensive and adaptable solutions. Today's businesses are unique and expect their partners to provide tailored services that can grow and evolve alongside them. For instance, a large enterprise might need a customized cybersecurity package that integrates seamlessly with its existing infrastructure, providing the agility it needs without unnecessary complexity.

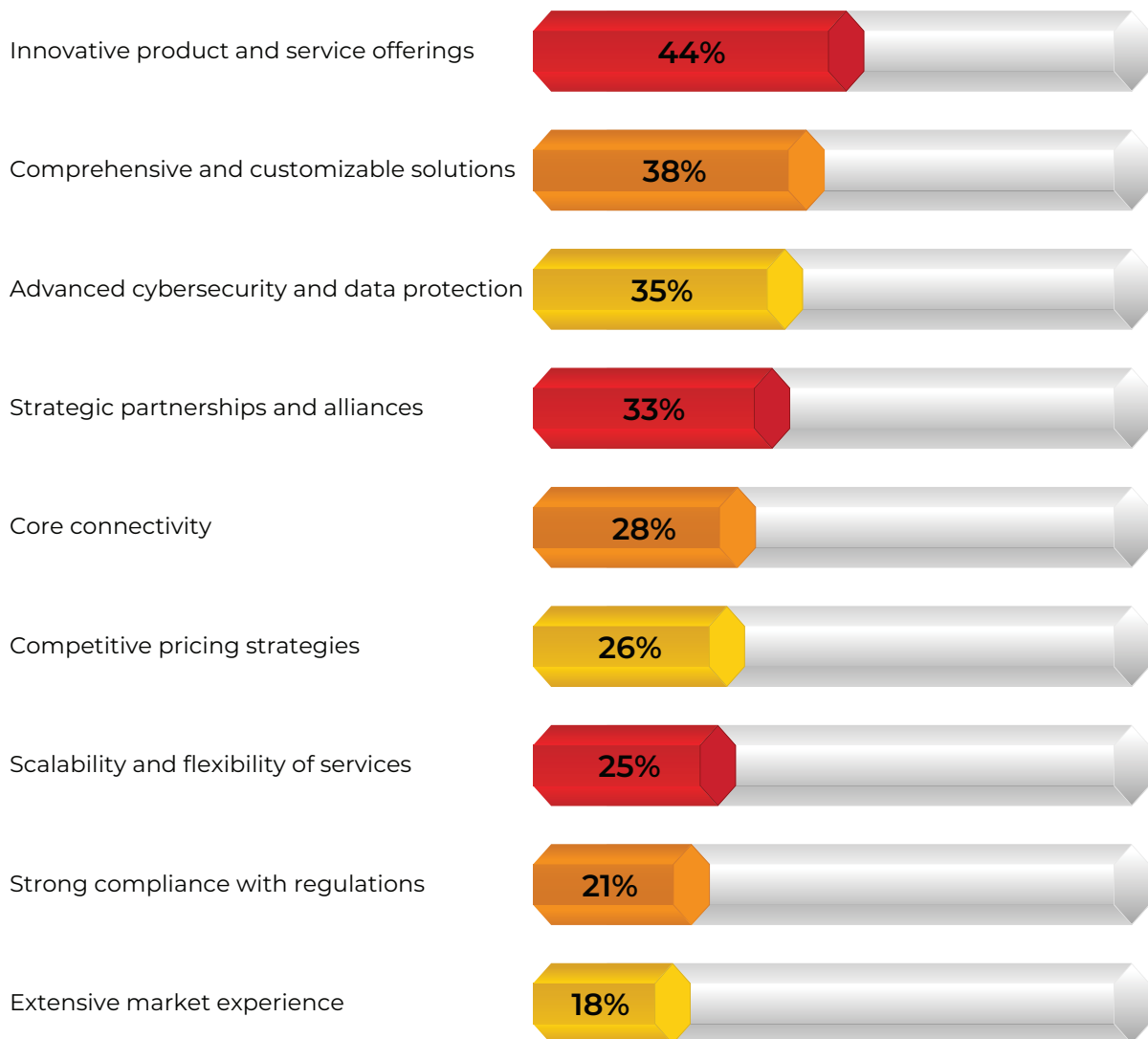
★ **Advanced cybersecurity and data protection.**

In a world where cyber threats are constantly evolving, 35% of executives prioritize advanced cybersecurity. Telcos can offer AI-powered threat detection systems that monitor a company’s network in real-time, flagging and responding to suspicious activity before it escalates into a significant threat. In industries such as healthcare and finance, where data protection is paramount, providing end-to-end encryption solutions assures businesses that their sensitive information is comprehensively protected.

**Figure 4**

**Telcos' Winning Formula:  
Innovate, Customize, Secure, Repeat**

Factors that will contribute to telcos' success in the B2B market



# Breaking Barriers: Rethink, Reskill, and Reimagine for B2B Success

While the B2B market offers significant potential for telcos, success hinges on their ability to execute a multi-faceted transformation. To thrive, telcos must address four key areas: technology infrastructure, talent development, financial strategy, and market perception.

## ★ Legacy IT systems are holding businesses back.

More than a third of executives (35%) say these outdated systems hinder their efforts to launch new B2B services (see Figure 5). Originally designed for consumer services, these systems often lack the flexibility and customization capabilities required by B2B clients. Without significant upgrades to create robust, adaptable, and scalable systems, telecommunications companies risk falling behind in the competitive B2B landscape.

## ★ The talent shortage.

Another major issue is talent—or the lack of it. Approximately 33% of telcos struggle to find and retain the right people, particularly those with expertise in digital services, data analytics, and enterprise solutions. As telcos transition from consumer services to more complex B2B offerings, they require new skills that are not always readily available.

## ★ Funding new initiatives.

Launching B2B ventures often requires substantial initial investments, which can take time to secure in a market characterized by fierce competition and tight profit margins (27%). Telcos that focus on the bigger picture and invest in innovation, partnerships, and new service offerings will be better positioned to compete effectively in the enterprise market.

## ★ Traditional telco image.

A quarter of executives believe their company's image is holding them back. They are perceived as slow, traditional telcos—hardly the agile and innovative partners that enterprise clients want to engage with. To succeed, telcos must shed their outdated image.

## From Struggles to Strengths: How Telcos Are Taking on Challenges

Thankfully, telcos are not just sitting on the sidelines—they are actively taking steps to overcome these hurdles and cement their position as essential partners in the enterprise space.

### ★ Partnering with technology providers.

Nearly half (47%) of telcos are partnering with tech providers to modernize their outdated IT systems. These partnerships enable telcos to upgrade their infrastructure without developing solutions from scratch, allowing them to pivot quickly and offer new services to enterprise clients. For example, collaborating with cloud service providers and software vendors helps overcome the limitations of outdated BSS systems.

### ★ Collaborating with hyperscalers.

About 35% of telcos are partnering with hyperscalers. These collaborations provide telcos with access to scalable solutions that meet the growing demands of enterprise clients, particularly in sectors such as IoT, data analytics, and AI-driven services.

### ★ Expanding service offerings.

To meet the growing needs of enterprise clients, 34% of telcos are expanding their service offerings. This includes the launch of new products and services tailored specifically for enterprise clients, such as managed services, cybersecurity, and enterprise connectivity solutions.

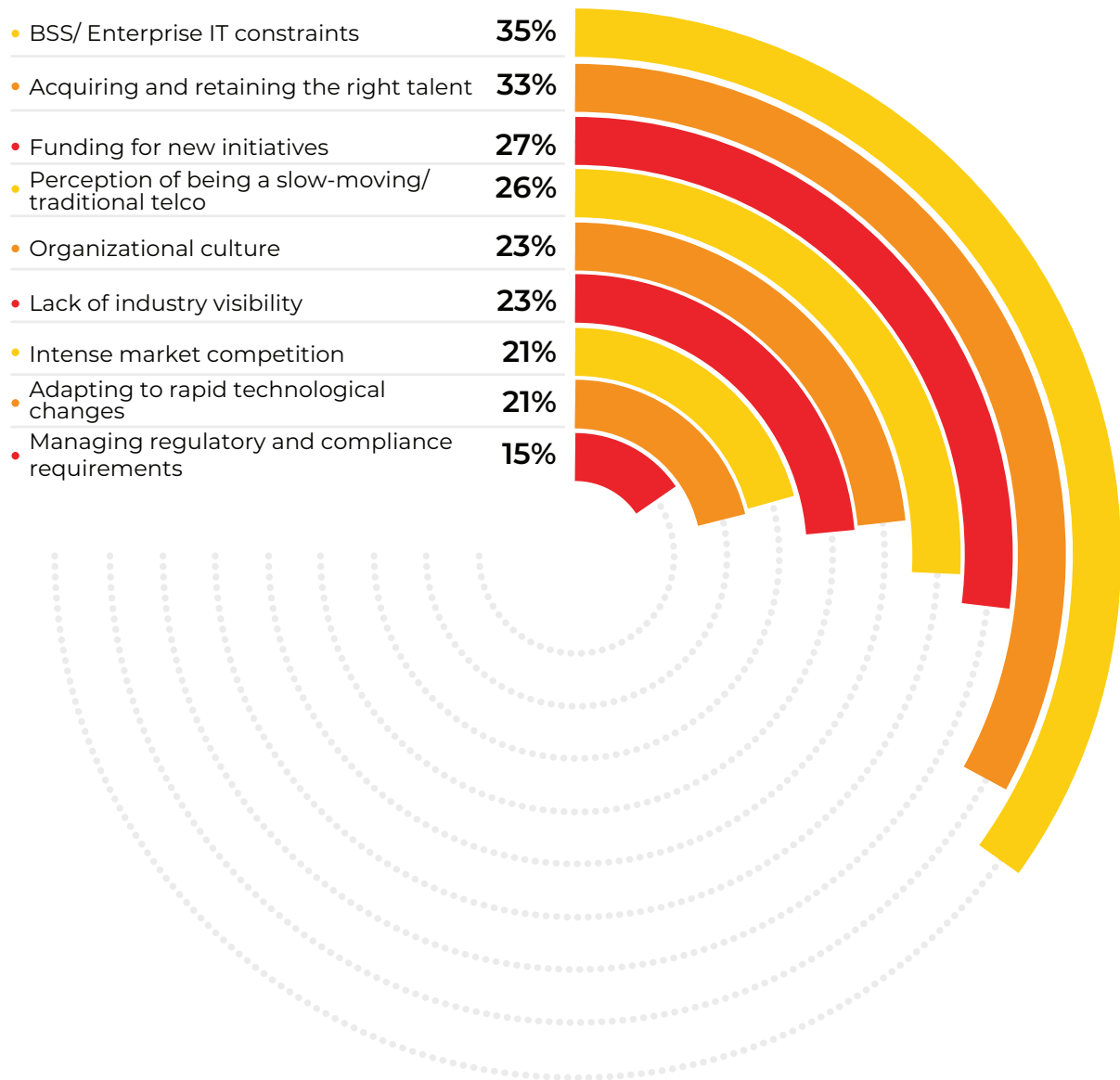
### ★ Forming joint ventures.

Joint ventures are helping 31% of telcos share the load by pooling resources and expertise to co-develop solutions for the B2B market. These partnerships often enable telcos to innovate faster and scale their operations without shouldering the entire burden alone.

**Figure 5 (A)**

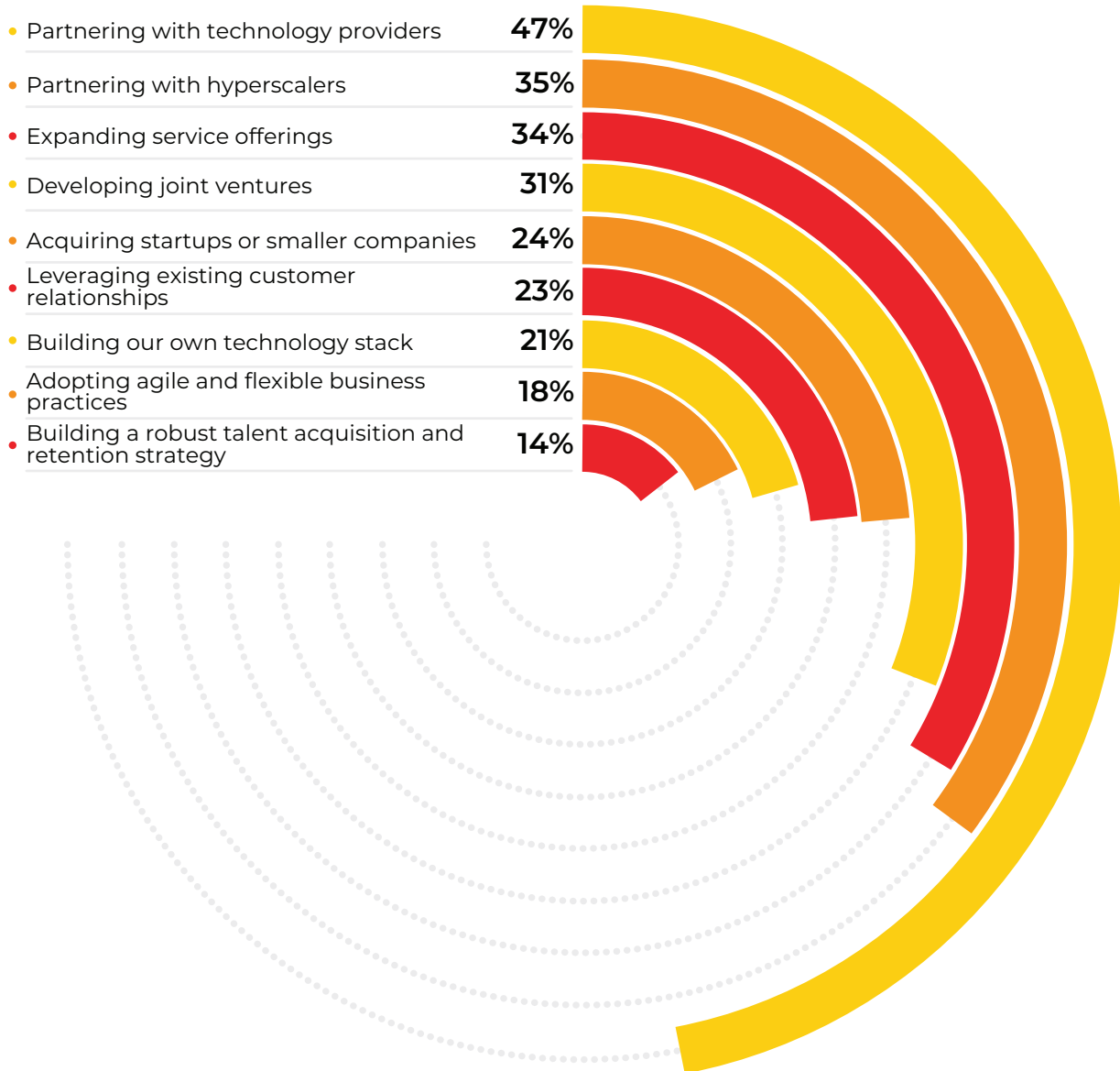
## Turning Challenges into Opportunities: How Telcos Are Addressing B2B Expansion Challenges

Top challenges inhibiting telcos from expanding into the B2B segment



**Figure 5 (B)**

Measures telcos are taking/ plan to take to address the challenges





# Quick Take: Define Your Role in 5G Revolution

5G is transforming industries, and telcos are at the heart of this revolution. However, the big question for telecom providers isn't just how to enable 5G—it's about choosing the role they want to play in leading the B2B market. Our survey reveals five key ways telcos can take the lead and make a real impact.

## 1. Tech Platform Innovators.

Half of the respondents believe telcos should move beyond being just connectivity providers and become tech platforms that integrate various technologies, such as edge computing, cloud, and AI.

**Why It Matters:** Enterprises are increasingly seeking all-in-one solutions instead of individual services. By offering platforms that manage everything from data processing to AI-driven insights, you position yourself as the go-to partner for enterprises looking to simplify their tech stacks and drive innovation across their organizations.

## 2. Ecosystem Builders.

45% of respondents view telcos as crucial in building 5G ecosystems, which are marketplaces where service providers, manufacturers, and other tech players collaborate to innovate.

**Why It Matters:** No single company can unlock the full potential of 5G alone. By becoming the backbone of a thriving ecosystem, you position yourself as a catalyst for growth and innovation. You don't just offer a service—you create a community where businesses can collaborate, opening new revenue streams for everyone involved.

## 3. Industry Innovators.

43% of respondents believe that telcos should lead the way in developing industry-specific use cases for 5G, ranging from healthcare to manufacturing.

**Why It Matters:** From smart factories to autonomous vehicles, 5G will enable a new wave of industry-specific solutions. You will be at the forefront of industry transformation, helping enterprises unlock the power of 5G to enhance their operations and improve customer experiences. Work closely with enterprises to co-create solutions tailored to their unique challenges.

#### 4. End-to-End Solution Providers.

A quarter of respondents believe that telcos should focus on delivering comprehensive, end-to-end 5G solutions, making it easier for businesses to adopt and innovate.

**Why It Matters:** Enterprises don't just want piecemeal technologies; they want solutions that are ready to deploy and drive immediate impact. By offering all-in-one 5G solutions, you can simplify 5G adoption, helping businesses move faster, reduce complexity, and launch their 5G-powered initiatives swiftly.

#### 5. Collaborative Co-Creators.

26% of respondents view telcos as potential partners in co-creating innovative 5G solutions with their clients.

**Why It Matters:** If you thrive on collaboration and want to build deeper relationships with your clients, focus on co-developing customized solutions that fit their unique needs. By working alongside your clients, you will forge stronger and more loyal partnerships while delivering solutions that create a real, lasting impact.

5G is more than just technology—it's an opportunity for telcos to redefine their relationships with enterprises. Whether you want to lead as a tech innovator, ecosystem builder, or co-creation partner, the future is yours to shape.

## The Digital B2B Gold Rush is Here: Will You Seize It?

The B2B digital gold rush is not just an opportunity; it's a necessity. Telcos possess the assets, the right to play, and a new breed of tools that serve as the bedrock of this new digital economy. However, in any gold rush, it's not merely the prospectors who strike it rich. It's those who act swiftly, decisively, and wisely that win. The rewards are significant, and competition is increasing rapidly. The question is not whether you want to participate in this digital gold rush, but rather how you will lead. How will you harness your power to shape your destiny? Will you play a supportive role or lead from the front? Whatever role you choose, redefining your approach now and taking calculated steps forward will transform your business. Just as in all previous gold rushes, those miners who exploit the successes of others are often left with empty pockets.

This is your chance to define business connectivity at the forefront. The Digital Gold Rush is here. Will you reap the rewards?

# Methodology and Demographics

Comviva commissioned Curious Insights, an independent global market research firm, to conduct an online panel survey with 100 senior IT and business executives at telcos around the globe. The sample was distributed across North America, Europe, the Middle East, Africa, and the Asia Pacific.



## About Comviva's Research Centre

Comviva's Research Centre examines current and future trends that will shape the future of the telecom industry. The Centre provides thought-provoking research and analysis of business and technology trends and dynamics, and collaborates with a wide range of business, technology, and academic thinkers regarding what the future of telecom will look like as technology changes every aspect of the industry.

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