

The changing face of communication

Social networking's growing influence on telecom providers

People are communicating more things to more people than ever before, and not just by phone anymore. Internet-enabled communication models are gaining audience, attention and market share at the expense of traditional telecommunication providers (Telcos). Can Telcos fight back and find new growth opportunities in this rapidly changing ecosystem? The challenge is not just in understanding the technology, but also the unfolding fundamental shifts in human communication behavior.

The face of communication has changed dramatically over the past few years. Traditional Telcos, which have historically dominated the arena of two-way interpersonal conversations, are increasingly being challenged by new market entrants that use open platforms to meet diverse and rapidly changing user wants and needs.

Social networking Web sites and services, such as Facebook, MySpace and Cyworld, have become primary communication media for a new generation of digitally aware consumers. Driven by high broadband penetration, maturing "social software" and affordable, mobile Internet-enabled multimedia devices, these sites and services are making inroads with enthusiastic users and garnering the attention of advertisers, consumer product companies and enterprises that are using social media to reach their customers, build brand loyalty and communicate with geographically dispersed employees, customers, suppliers and partners.

The widespread social networking phenomenon reflects shifts in two long-term communication trends. First, there is a shift in communication patterns – from point-to-point, two-way conversations, to many-to-many collaborative communications. Secondly, control of the communication environment is transitioning from Telcos to open Internet platform providers, enabled by better, cheaper technology, open standards, greater penetration of broadband services and wireless communication networks.

The combined effect of these trends is altering the competitive landscape in communications and giving rise to emerging business models that include:

Open and Free – This model features companies that offer one-to-one communication services, but through an open Internet platform and at no – or very little – cost. These services potentially threaten traditional services such as long distance calling and mobile roaming.

Gated Communities – Companies using this model focus on many-to-many communications, rather than point-to-point, within telecom-controlled environments. They are a "walled-garden" for operator-led collaboration services and are likely to appeal to users and enterprises that desire secure and reliable communication environments.

Shared Social Spaces – This rapidly growing model facilitates collaboration on the open Internet. Key players include social networking sites such as MySpace and Facebook. These providers have the potential to become integrated communication platforms. Besides gaining audience share, these services pose an operational challenge to Telcos as they "piggyback" on existing communications infrastructure, imposing capacity and cost issues for network providers.

In the short-term, as the industry transitions to more open and collaborative communication models, the traditional model will likely remain dominant. Over the long term, however, the industry can expect a shift toward models that facilitate collaboration and sharing, with Shared Social Spaces attracting a more significant and impactful share of communication time.

Over the short to medium term, Telcos should focus on laying the foundation for a more open and collaborative future to:

Newmediacomau The Changing Face Of Australias Media And Communications

Marcel A. Müller



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