

Omdia Market Radar: Total consumer cybersecurity solutions for telcos

Summary

Catalyst

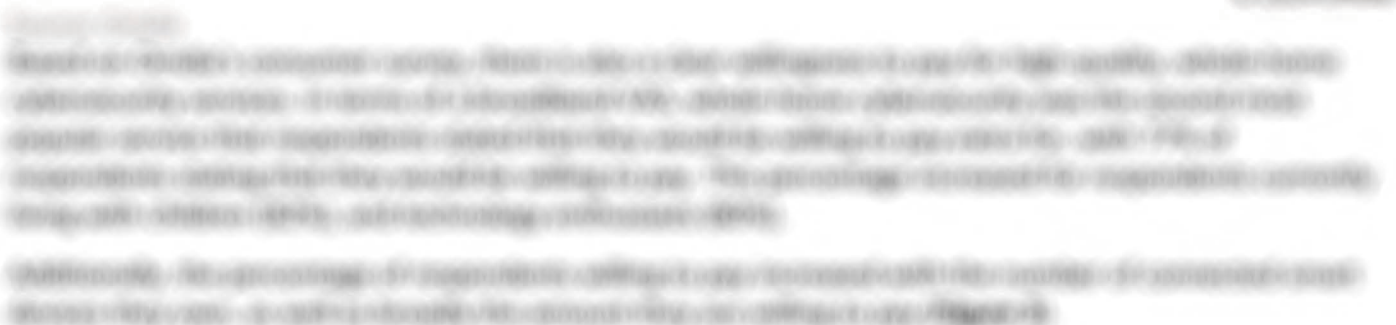
Telcos are rapidly shifting their broadband marketing focus away from pure speed to broadband quality of experience (QoE). In this aim, the initial focus is on providing a high-quality, highly consistent, and reliable broadband service; however, after that, the focus turns to broadband value-added services (VAS) to further amplify the experience. Cybersecurity is one of the most important VAS. As one executive recently put it, “First we must provide a high-quality broadband experience, then we must ensure a safe one.”

Telcos have provided consumer cybersecurity services alongside their broadband and mobile services for many years, but these tended to consist only of end-point security solutions—leaving some devices unprotected altogether and relying on the consumer to manage the security of the others. To ensure full protection, consumers need a solution that protects all their connected devices across all networks and all of the time—in this report, we refer to this as “Total consumer cybersecurity.” Providing 100% protection is not easy, but this report explores the offerings from some of the leading vendors in this space who are looking to help telcos provide the most comprehensive solution possible.

Key messages

- To provide total consumer cybersecurity, it is necessary to provide three security layers: network, router, and end-point protection. Network security provides a base level of security, including DNS cybersecurity. Router-based protection then protects all devices in the home that are connected to the home Wi-Fi network. This includes IoT devices that often have no (or lower) built-in protection. The end-point security then protects devices, such as smartphones, tablets, and laptops, when they are connected to the mobile and third-party Wi-Fi networks.
- Most consumers look to their telco for protection. Technically, it is not the broadband service provider’s responsibility to ensure their broadband customers are protected when online. However, over 50% of consumers in Omdia’s consumer surveys state that the telco is their preferred supplier for cybersecurity, and therefore, it is an obvious VAS for them to provide. Additionally, in Omdia’s view, providing a good level of cybersecurity service can help differentiate the broadband offering, help increase service stickiness, and help promote the broadband service provider as more of a “digital lifestyle service provider.”
- Total cybersecurity is something many consumers are willing to pay for. Indeed, based again on Omdia’s surveys, alongside broadband speed guarantees, it is the most likely broadband VAS that they would be willing to pay for. This is increasingly the case for consumers living with children, or those with installed IoT devices.
- It’s not yet possible to protect all consumers all the time. Even with a combination of router and end-point protection, it is not possible for telcos to always protect their customers—telcos can’t force the consumer to install and enable the proper security. However, telcos can help by flagging up to consumers when a certain device is not adequately protected, and by providing dashboards and management tools to help them manage this. It is critical that vendors provide the necessary tools to help telco clients enable this type of capability.

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Things change are still the same

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Key capabilities and vendor landscape

Key capabilities include: procurement, supply chain visibility, sustainability, risk management, demand management, inventory management, logistics management, and customer experience. Key vendors include: SAP, Oracle, Microsoft, Amazon, Alibaba, and others.

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English - Writing - Writing

This is a writing task. It is designed to help students develop their writing skills. The task is divided into two parts: a writing task and a writing task. The writing task is designed to help students develop their writing skills. The writing task is designed to help students develop their writing skills.

Appendix

Introduction

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[Appendix - Writing - Writing](#)

