

Telcos dig for value beyond connectivity

As the telecom landscape shifts, operators must push beyond traditional connectivity and embrace new services to remain relevant and drive growth. STL Partners' Consumer innovation tracker delivers in-depth insights into innovative digital services offered by telcos worldwide, spotlighting operators who are redefining the consumer experience and setting trends that can inspire the industry.

Kerina Naran, Analyst

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STL Partners' Consumer innovation tracker

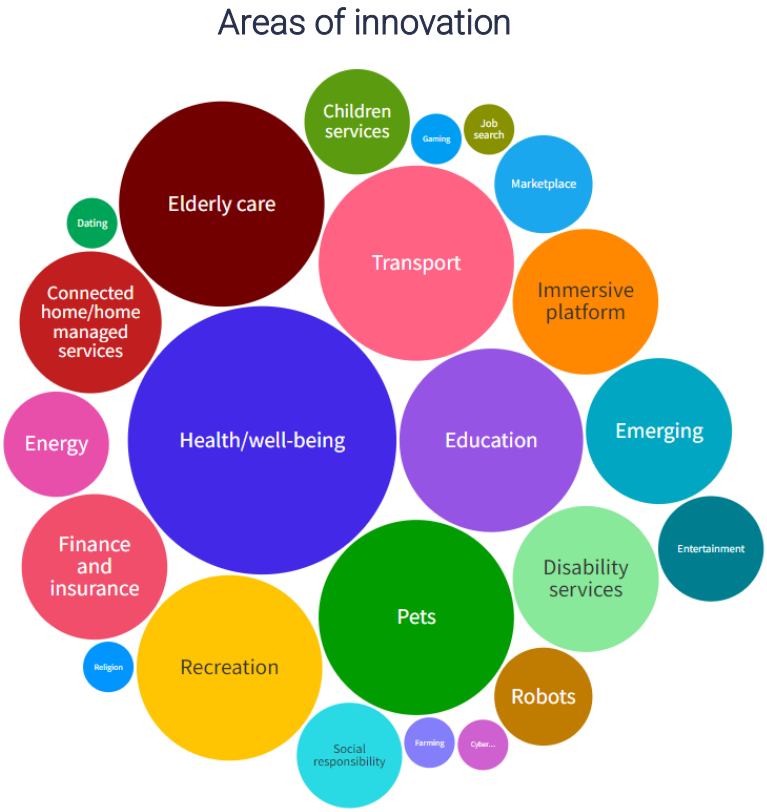
For telecom operators worldwide, it is essential to move beyond connectivity and venture into innovative services that can capture a larger share of consumers' wallets. Our **Consumer innovation tracker**, first launched in September 2024 and updated in October, with monthly updates to follow, provides a detailed analysis of standout offerings from telcos worldwide, carefully selected by us. We recognise innovation in the form of service design, business model, partnerships or something completely different.

Our Consumer innovation tracker is designed to:

- Inspire operators and encourage them to look into new areas.
- Capture emerging trends to ensure operators are not left behind by their competitors.
- Provide insights for telcos' partners into which operators are most innovative.

October 2024 highlights

The latest edition of the tracker highlights 103 examples of consumer innovation from 35 operators across the globe, with operators in Asia-Pacific standing out as leaders. This update introduces 14 new services, two in areas not previously included in the tracker: gaming and cybersecurity. The graphic below provides a full overview of the innovation areas covered in our tracker.



Source: STL Partners

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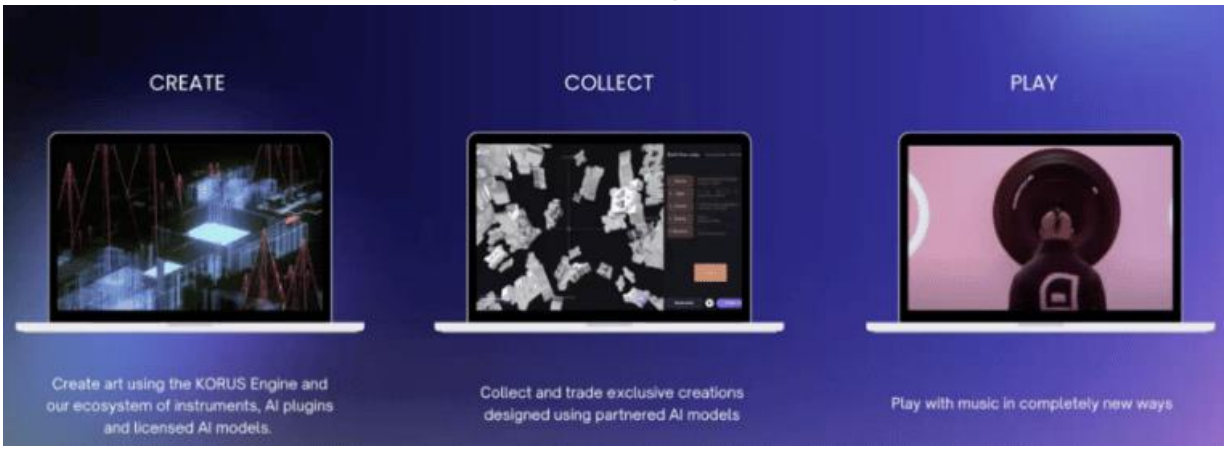
With each update we spotlight emerging trends and feature specific operators, along with standout consumer product and service launches that, in STL Partners' view, excel in both innovation and potential impact.

1. KDDI's immersive platform

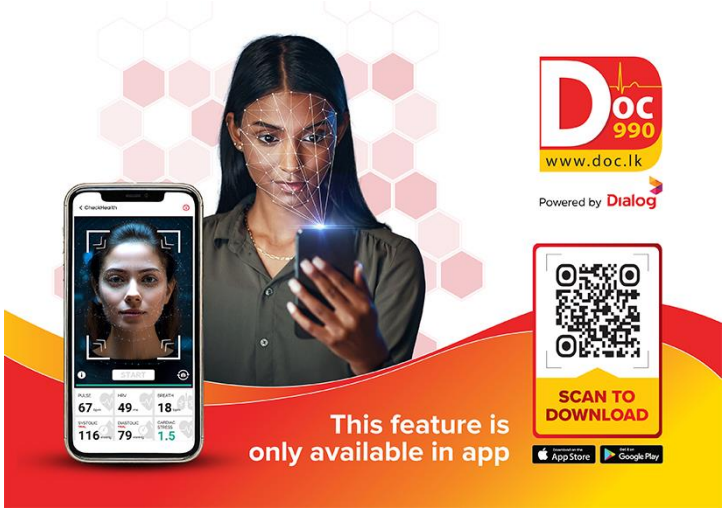


Source: Korus

What is it: KDDI, Pixelynx, and palan have joined forces to deliver an innovative extended reality (XR) music experience, combining platforms and tools. It allows users to create and remix music with XR content in real-time, using KDDI's αU on Cloud for AI-powered live services, KORUS for music generation, and palanAR for WebAR content creation.

What makes it different: The platform integrates generative AI and cloud-based music tools, allowing users to interact with music in XR environments. Its no-code WebAR tool broadens accessibility, bringing a unique combination of music and visual experiences to consumers beyond typical platforms.

2. Dialog Axiata's AI-health scanning feature



Source: Dialog Axiata

What is it: Integrated within Dialog Axiata's telemedicine app, Doc990, this AI-powered health scanning feature enables users to monitor vital signs, such as heart rate and stress levels, directly from their smartphones, enhancing healthcare accessibility in Sri Lanka.

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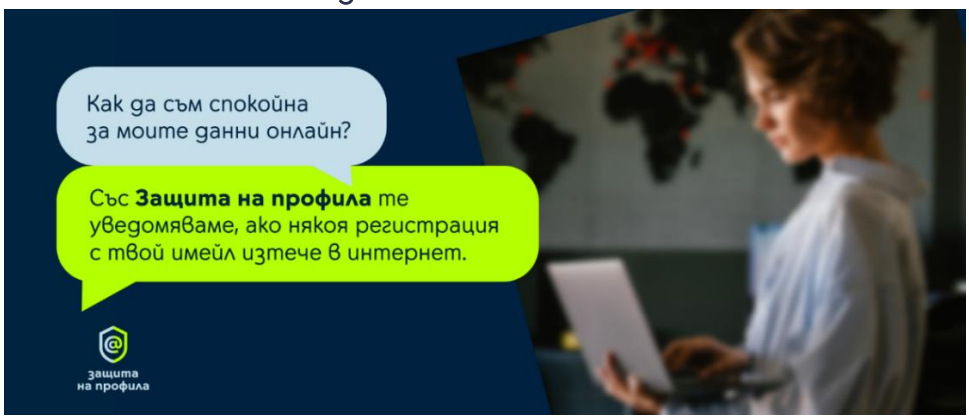
What makes it different: What sets it apart from other telco healthcare apps is its AI-powered health scanning feature which provides real-time health insights. By offering key health metrics on a smartphone, it simplifies essential health monitoring for users.

3. Yettel Bulgaria's Profile Protect service



Source: Yettel

What is it: Yettel Bulgaria's Profile Protect provides real-time alerts for potential data misuse, helping users safeguard their digital identities through proactive security measures.

What makes it different: Unlike standard data security services, Profile Protect focuses on alerting users instantly when personal data misuse is detected, allowing for rapid response and enhancing consumer control over digital security.

Consumer innovation drives the future of telcos

Consumer innovation is shaping the future of telecoms. By stepping into non-core areas, as illustrated above, telcos can tap into new revenue streams. With insights from the tracker, operators gain the tools to spot emerging trends, explore fresh business models, and forge partnerships that support these goals. Those telcos willing to take bold steps in innovation and broaden their service offerings will be the ones to set the pace for the industry's future.

Find more details of the tracker **here.**

Subscribers to STL's Consumer research stream can access the full database and the interactive tool **here**

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