

Who's the Next Disruptor?

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Both AT&T Mobility's CEO Ralph de la Vega, and Verizon's chief executive Lowell McAdam took this week's UBS Investor conference as an opportunity to hammer home their usual talking points. De la Vega talked record Q4 smartphone sales, while McAdam pitched his company's lead in the race to LTE. Not exactly jaw-dropping stuff from either camp.

Both men talked about the recent deals between Softbank and Sprint, and T-Mobile USA and MetroPCS. McAdam was enthusiastic about those deals, saying it's good to have four healthy players in the U.S. market. De la Vega too seemed unthreatened by either of these transactions, saying that neither changes the underlying competitive nature of the wireless market in the United States.

While I'm intrigued by AT&T and Verizon's push to add new revenue sources like IP-based in-home systems and mobile wallet products, I'm even more interested in finding out who or what exactly will keep De la Vega and McAdam up at night. Maybe nothing? Maybe something?

I'll entertain the idea that a fresh infusion of capital from Softbank, and a network vision could boost Sprint's current standing. What about T-Mobile with an iPhone all its own? And yet, I still think the next major disruption will come out of left field.

Does Google have something up its sleeve? Will Dish Network, with an LTE Advanced network, enter the market with a few new ideas? Before the FCC shot it down there was actually a lot of excitement around the kind of wholesale-only business model that LightSquared was pitching. And aren't these non-traditional MVNOs—FreedomPop, Karma—a heck of a lot more interesting than shared data plans with exorbitant monthly device connection fees? Granted, MVNOs are a boon for the larger carriers, but these small companies are the first glimmers that a more creative business really is possible.

Verizon and AT&T will be around for a very long time. However, carriers are giant vessels that are known for their slow reaction time. Taking a year to turn the boat is a luxury few ships sailing in these rough seas have anymore. This industry moves so fast that we're even beginning to hear the first grumbings that Apple is suffering from innovation fatigue. Just two years ago, there weren't too many people that saw Samsung coming on the way it has.

On that note, I'm also guessing that few will see the submarine that surface out of nowhere and seriously rocks the tier-one carriers' boats. Strap in for 2013. If nothing else, it should be interesting.

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