

# FMC and Convergence Service Strategies: the evolution of the value proposition – 3rd edition

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2013

How will fixed mobile convergence affect pricing strategies?

Exclusive 2008 industry survey results

Now in its 3rd edition, the **FMC and Convergence Service Strategies strategic report** provides an insight into the evolving nature of convergent networks, the business opportunities and the challenges facing players involved in converged telecommunications. This edition critically evaluates current and future developments, their ramifications and potential future scenarios as convergence develops paying particular attention to the opportunities of homezone data traffic offload, pricing and bundling strategies and the ongoing process of operator business unit convergence.

The most complete analysis of mobile and fixed convergence service strategies available

## NEW IN THIS EDITION

- ✓ **Extensive forecasts to 2013** – including active subscriber, business/consumer users, homezone and outside user split by consumer and enterprise, femtocell and device-based (UMA and IMS) subscribers, enterprise and consumer for device based subscribers and data and voice down to regional levels
- ✓ **Forecasts weighting scenarios** – incorporates three unique usage scenarios used in combination with general analysis metrics, which consider technical development, handset usage and manufacture, infrastructure, general telecommunications development, enterprise, home, data and voice usage. These are designed to improve the accuracy and granularity of the forecasts
- ✓ **Key market overview** – insight into the strategic implications and ramifications of FMC/convergence
- ✓ **New case studies** – providing an in-depth understanding of the strategies of major players including operators, vendors, manufacturers and new virtual service facilitators
- ✓ **Company strategy insight** – including pricing and bundling strategies, identification of early successes and analysis of how these successes have been built on
- ✓ **Exclusive 2008 Industry Survey results** – fully updated and industry peer reviewed primary data analysis

See inside for more new coverage



# FMC and Convergence Service Strat

## FMC and Convergence Service Strategies – what's in it for you?

### Operators & service providers:

- Recognise the opportunities, challenges and threats within the market
- See how major players including Orange and T-Mobile have tackled the challenge of developing charging and pricing strategies for FMC
- Understand and leverage the opportunities, as a fixed or cellular player, of in home homezone data traffic offload

### Infrastructure and software vendors:

- Understand and benefit from the opportunities of data offloading from the homezone environment
- Assist in the process of developing solutions designed to more effectively leverage client investments made in fixed and cellular infrastructure using FMC
- Understand FMC opportunities and identify key players, potential partners and current and evolving roles in the service value chain

### Device and handset manufacturers:

- Understand the increasing importance of device manufacturers in the FMC value chain and identify successful strategies toward leveraging this value while profiting from the progress of WiFi and other fixed wireless technologies in the homezone and out of home markets

### Consultants, analysts and venture capitalists:

- Benefit from unbiased analysis and data free from industry hype
- Provide clients with clear business intelligence and case studies to support recommendations and investment while identifying successful investment opportunities from the substantial number of case studies and company profiles included
- Advise on successful service approach and bundling strategies

### Regulators:

- Ascertain the impact of FMC markets on the regulatory environment
- Compare regulatory developments on the global stage and measure the effectiveness of legislative approaches, their implications and long term consequence

“The FMC business has reached a key point in its development with radically different approaches being taken by the various value chain players involved. The market remains in a confused state of flux with little or no discernable comprehensive strategy from the key players involved and the market being characterised by separate approaches.

Despite this the market is expected to grow to approximately 190 million or around 5% of the total cellular market by 2013 driven by the operator desire to more efficiently utilise network resources and reduce the costs of running and installing new telecommunications technology.”

Paul Merry, Senior Research Analyst, Informa Telecoms & Media



This report addresses this uncertainty by identifying potential route maps to success in the convergent telecommunication industry and making recommendations for cellular and fixed operators, manufacturers, software developers and evolving virtual service providers.

All value chain players involved in FMC service provisioning process are critically evaluated considering those best placed to take advantage of market opportunities now and in the future based on various scenarios of potential development including in-depth case study and business model analysis.

## THIS EDITION WILL GIVE YOU:

### Extensive market forecasts to 2013

Make fully informed strategic decisions and support your business planning with independent market forecasts to 2013, including FMC subscriber figures - split by consumer and enterprise, femtocell and device-based (UMA and IMS) subscribers, enterprise and consumer for device based subscribers and data and voice down to the regional level

### In-depth trend analysis

This comprehensive analysis considers FMC from the widest possible perspective, including an insight into the strategic approach and analysis of the business choices of key players. The report qualifies and analyses the inherent strengths and weakness of these choices

### Independent case studies

Fully understand the threats and opportunities FMC represents with detailed company breakdowns that allow you to assess the potential opportunities and pitfalls of FMC for your organisation. Case study analysis considers all players involved in the FMC value chain from manufacturers through to virtual service providers including VoIP operators

### Expert future outlook

In-depth analysis of existing FMC players allow you to benchmark your own business strategies.

# Strategies: The evolution of the value proposition – 3rd edition

## FORECASTS TO 2013 INCLUDED IN THIS REPORT:

- » Subscribers by region including:
  - » US
  - » Canada
  - » Latin America
  - » Asia Pacific
    - Japan
    - China
    - Korea
    - India
    - Rest of AP - Developed
    - Rest of AP – Developing
  - » Europe
    - Western Europe
    - Eastern Europe
  - » Africa/Middle East
    - Africa
    - Middle East
- » Enterprise Subscribers total and by regions
- » Consumer Subscribers total and by regions

## KEY QUESTIONS ADDRESSED BY THIS REPORT:

- ✓ How will service diversification influence customers purchasing habits?
- ✓ What is the process involved in developing pricing and charging strategies to fit diversified and bundled service offerings?
- ✓ What are the key technologies and service enablers of fixed mobile convergence?
- ✓ What percentage of the market will femtocells, UMA and IMS capture?
- ✓ What will the telecoms market look like as it migrates toward convergence and an IP centric world?
- ✓ What are the actual CAPEX and OPEX savings FMC technologies will deliver?
- ✓ What are the risks posed by VoIP and virtual service providers such as Rebtel and what are the opportunities, threats, partnership opportunities and defence strategies available?

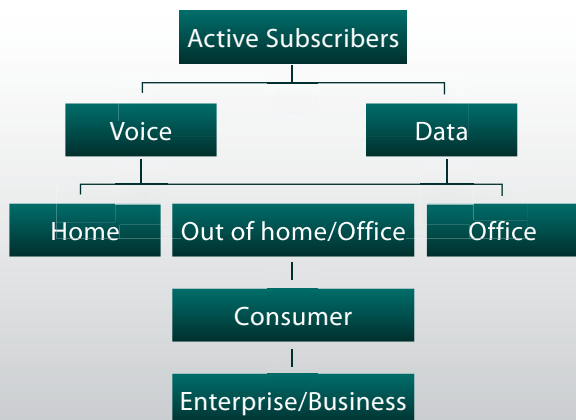
Convergence has not proved to be as popular as expected at least in terms of revenue and customer take-up and operators (particularly cellular and fixed players) want to know why. They also wish to develop strategies toward improving this situation.

*The industry faces a complex and difficult period requiring a complex understanding of the underlying workings of the FMC, fixed and cellular markets. The industry is entering a period of extreme fragmentation with many companies opting to draw their disparate businesses together to form stronger and more cohesive converged enterprises e.g. France Telecom through its global re-brand as Orange.*

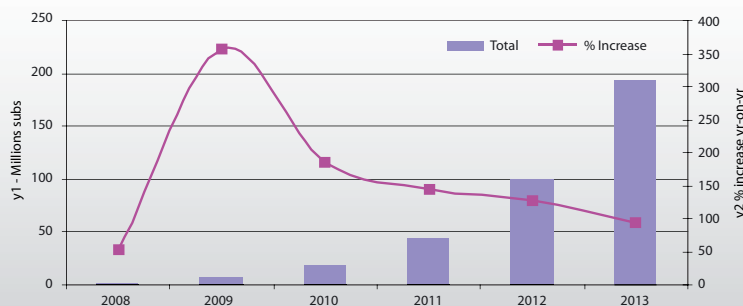
Fixed and cellular players are also awakening to the prospects of wholesale as a viable business model with convergence seen as a facilitator of this golden opportunity.

**This report provides all the value chain players involved with the tools to succeed in this new environment providing key analysis and forecasts to 2013.**

## FORECASTS SPLIT



## COMBINED GLOBAL FMC SUBSCRIBERS – 2008-2013



Source: Informa Telecoms & Media

## COMPANIES IN THIS REPORT:

### In-depth case studies:

- Alcatel-Lucent
- France Telecom/ Orange (Unik)
- Hellosoft
- Nokia
- Rebtel
- Telefonica
- T-Mobile (Hotspot@ home)
- Truphone
- Ubiquisys
- Virgin Media

### Other companies profiled:

- 3 (operator)
- Acme Packet
- Aricent
- AT&T (Unity)
- Brasil Telecom (Unico)
- British Telecom (Fusion/At Home)
- C&W
- Cincinnati Bell (Home Run)
- Fring
- Golden Telecom (UMA)
- Google Android
- Google Talk
- Grand Central
- ip.access
- Jajah
- jaxtr
- Mobivox
- Motorola
- Neuf cegetel (TWIN)
- O2
- RadioFrame
- Samsung
- Skype
- Sony Ericsson
- Sprint (Airwave)
- Talkster
- Telecom Italia (Unica)
- TeliaSonera (Home free)

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# TABLE OF CONTENTS

## Chapter 1 – Executive summary

## Chapter 2 – Strategic Approaches

- FMC an idea in waiting
- Defining convergence in the context of FMC
  - End users and Convergence
    - The origins of the Concept of Convergence and its use
  - Convergence in the context of telecommunications
    - Fixed mobile convergence
  - Fixed Mobile Substitution
- Operator strategies
  - Pure Mobile operators
  - Integrated operators
  - Fixed operators
  - Cable operators
  - Other players

## Chapter 3 – Business opportunities and challenges

- Major opportunities and challenges of FMC
  - Data traffic offloading
    - Cost savings
  - VoIP
  - Handset and device developments
- Opportunities and challenges – service provider types
  - Pure mobile operators
  - Pure fixed operators
  - Integrated/hybrid operators
  - Cable/Broadband operators
  - Alternate operators
  - Device and network manufacturers
  - Software application and hardware vendors

## Chapter 4 – Pricing and Bundling Strategies

- Pricing and service bundling
  - Fixed pricing anomalies
  - Pricing as an incentive to take up FMC
  - Customer perception of Bundling and 'bucket' plans
  - Handset price points
- Convergence, mobile handset segmentation and pricing
  - Alternate pricing strategies
- Advertising/subsidising
  - Mobile operators resistance of advertising based solutions
  - Privacy issues
- FMC and Backhaul
  - Quantifying backhaul costs
  - Next generation networks

## Chapter 5 – Virtual operators

- New service providers
  - Truphone
    - Company background
    - Service offering
    - Market focus
    - Device strategy
    - Pricing Strategy and customer support
    - Analysis
  - Rebtel
    - Company background
    - Service offering
    - Market focus
    - Device strategy
    - Pricing strategy and customer support
    - Analysis
  - Hellosoft
    - Company background
    - Service offering
    - Market focus
    - Pricing Strategy and customer support
    - Analysis

## Chapter 6 – Convergent Service enablers

- Radio Access Network Provider
  - Ubiquisys
    - Company background
    - Service offering
    - Market focus
    - Pricing Strategy and customer support
    - Analysis
  - Handset Vendor
    - Nokia
      - Company background
      - Service offering
      - Market focus
      - Pricing Strategy and customer support
      - Analysis
  - Network protocol service provider
    - Alcatel-Lucent
      - Company background
      - Service offering
      - Market focus
      - Pricing Strategy and customer support
      - Analysis

## Chapter 7 – FMC operators

- FMC Operator types
  - Fixed operators:
    - Telefonica
      - Company background
      - Service offering
      - Market focus
      - Analysis
    - Pure Mobile
      - T-Mobile
        - Company background

- Service offering
- Market focus
- Pricing Strategy and customer support
- Analysis
- Hybrid Operators
  - France Telecom/Unik
    - Company background
    - Service offering
    - Market focus
    - Pricing Strategy and customer support
    - Analysis
  - Broadband Operators/Cable
    - Virgin Media
      - Company background
      - Service offering
      - Market focus
      - Pricing Strategy and customer support
      - Analysis

## Chapter 8 – Forecasts

- Methodology
  - Definitions
    - Pragmatic approach
      - Device-based FMC Subscriber forecast methodology
      - Active device users versus inactive device users
      - Weighting ratio methodology
      - Advanced Weighting
      - Medium Weighting
      - Low Weighting
      - Other Analysis Metrics
    - Femtocell Methodology
  - General assumptions
  - Global Outlook
    - Combined UMA, IMS and Femtocell global FMC subscriber forecasts
    - Global device-based FMC Subscriber forecasts – IMS and UMA
    - Global In-Home FMC Subscriber forecasts – Femtocells
  - Regional analysis
    - Regional combined UMA, IMS and Femtocell FMC subscriber forecasts
    - Regional device-based FMC
    - Regional in home-based FMC
  - Country Analysis
    - North America
      - USA
      - Latin America
    - Asia-Pacific developed
    - Asia-Pacific developing
    - Western Europe
    - Eastern Europe
    - Africa
    - Middle East

\*contents correct at time of printing

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# About the Author

**Paul Merry** is a Senior Research Analyst with Informa Telecoms & Media with 8 years of experience. Paul has lead authored several reports across the Informa Telecoms portfolio including Fixed Mobile Convergence, MVNO Strategies, Mobile Entertainment, Mobile Transactions in Europe and Global Mobile Prepaid Strategies and Forecasts.

During his time as a research analyst Paul has authored and co-authored several strategic reports on the subjects of telecommunications, the internet, Metropolitan Area Networks, billing and CRM and has undertaken a range of consultancy projects including the evaluation of business strategies, market potential of new technologies and economic modelling. He has also presented findings to top-level executives at events throughout the world.



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