



Mobile Market Development

Convergence Watch - Key European Markets

Program: Maximising Wireless Profit

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Author: Liam Mimmagh

Description: Mobile Market Development has been producing its series of Convergence Watch papers since 2007. During that time we have reviewed the changing iterations of converged propositions promoted by incumbent and alternative (fixed and mobile) players and find that the incumbent fixed operators in most cases remain the dominant when it comes to the provision of dual- and triple-play services such as home phone, broadband and TV. Cable operators currently represent the greatest triple-play challenge to incumbent fixed operators, largely through having an established TV customer base to which they can cross sell faster broadband speeds compared to traditional fixed ADSL providers. From a triple-play perspective, TV has been a difficult element to get right for fixed and mobile operators. Many operators have had disappointing results in their TV ventures and services have been withdrawn or scaled back to online video rental services. Some operators are gaining ground however, by offering a relevant TV proposition delivered via high-speed broadband connections. The bundling of mobile services with core dual- and triple-play propositions (phone, broadband and TV) has achieved more success where operators integrate their fixed and mobile propositions in a complementary way rather than bundling unrelated fixed and mobile services together and relying on heavy and expensive discounts to stimulate sales. This report reviews the convergence practices of 22 fixed, mobile and cable operators across the five main European markets (France, Germany, Italy, Spain and the UK). By comparing with our 2011 series of Convergence Watch papers, we highlight the changes in convergence propositions over the last year, review the current convergence state of play for each market and provide an overview of their performance in light of the current economic circumstances currently prevailing in Europe. This report will be valuable to those interested in learning how operators have managed their convergent portfolio over the past year by discovering how operators have shaped their propositions to address individual market needs.