# European Mobile Consumer Services

*AN IDC CONTINUOUS INTELLIGENCE SERVICE*

The European mobile communications market has reached maturity. To continue growing in a mature market, mobile service providers must stimulate further usage of existing services, while reducing the cost of providing them. They must look outside Europe to markets that are not mature, outside mobile to fast-growing services such as home broadband and IPTV, and outside telecoms itself to the adjacent markets of information and entertainment media. IDC's *European Mobile Consumer Services* analyzes how mobile strategies in Europe are evolving to serve the need for new revenue growth in the mass market. Through a combination of informed, insightful commentary and in-depth market analysis, IDC's analyst team helps clients understand and respond to major market developments.

## Markets Covered

This service covers the following segments:

- Mobile communications: voice, messaging, and content sharing
- Mobile entertainment: music, gaming, TV and video
- Mobile information: search, navigation, payments
- The expanding mobile service provider landscape: MVNOs, handset vendors, Internet players, content owners, media companies
- The development of mobile as an advertising medium
- Fixed-mobile convergence and fixed-mobile substitution
- Mobile broadband network development
- Mobile devices by air interface, platform, OS, form factor, display type, storage type

## Subjects Analyzed

Throughout the year, this service will address the following topics:

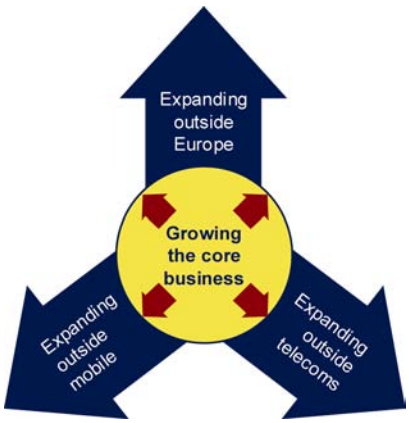
- The development of mobile broadband networks
- Mobile access to Internet services
- The increasing importance of location capability
- The role of content and advertising in mobile services
- The evolution of mobile phones and handsets into multimedia computing devices

## Key Questions Answered

This service addresses the following issues that are critical to your success:

1. How big will the market be for mobile entertainment and what will drive or inhibit growth in the market?
2. What role will user-generated content play and what are the best go-to-market strategies for facilitating media sharing?
3. What is the role of mobile advertising and how can mobile players cash in on this opportunity?
4. What are the current and desired primary uses for mobile devices in Europe?
5. How are operators and other players in the value chain reacting to change in the market and how are their strategies evolving?
6. How can players monetize LBS- and GPS-based services, and what partnerships can be formed to integrate services like mobile search?
7. How fast is the market embracing mobile broadband? To what extent are mobile broadband revenues new and to what extent do they cannibalize existing revenues?

## The European Mobile Marketplace




Source: IDC

## Competitive Analysis

IDC's *European Mobile Consumer Services* examines how wireless and mobile players are positioning themselves to compete in the European mobile communications market. This service reviews strategies, market positioning, and future direction of market players, in the context of service, device, and network developments.

## Core Research

This service focuses on the following core research. In addition to the insight provided in this service, IDC may conduct additional research on specific topics, or emerging market segments, via research offerings that require additional IDC funding and client investment:

***Mobile Navigation Services***
This study examines the market for value-added mobile services that exploit the increasingly widespread availability of precise location capability, mapping content, and traffic information.

***Mobile Broadband Services***
This study analyzes the rapidly growing consumer market for using the mobile network to connect PCs to the Internet, enabled by HSPA services and plug-and-play and embedded modems.

***Web 2.0 and Mobile Handsets***
This study examines the ways in which the use of Web 2.0 services such as social networking, content sharing, blogging, and podcasting on mobile handsets can create new usage patterns and new revenue opportunities.

***Mobile Market Forecasts in Western Europe***
Forecasts are provided for 16 Western European countries for the major mobile market KPIs, including subscribers, revenue, ARPU, and traffic for voice, messaging, data, and content services. The market forecasts are updated twice yearly.

## A Complete Intelligence Solution

IDC offers a complete market intelligence solution customized to meet your business requirements. The array of products and services available to you includes:

- The opportunity to have your specific questions answered through personal interaction with industry experts who cover the topics and markets in your service
- Around-the-clock access to our market intelligence on idc.com, IDC's personalized Web experience
- A view of the market's future with 12 months of continuous intelligence about its direction and the reasons behind it, along with actionable advice for taking advantage of existing and emerging opportunities
- Complimentary/special admission price to IDC's annual Directions conference, where you'll hear our latest forecasts and network with IDC analysts and other industry professionals
- Complimentary invitations to monthly executive telebriefings, interactive forums designed to provide you with insights about research and strategies directly from IDC analysts

To find out how our flexible packaging options can meet your specific business needs, please contact your IDC account manager.

## IDC's Investment Philosophy

As a privately held company, IDC believes that our customers are our primary constituency. A large percentage of every revenue dollar is reinvested back into our products, including more analysts, more geographic coverage, and extensive primary research.

Our steady growth over the past 10-plus years reflects our commitment to investing in our customers.

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IDC Analyze the Future

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