# European Consumer Broadband Services

*AN IDC CONTINUOUS INTELLIGENCE SERVICE*

The European consumer broadband market has been of the hottest market segments in the industry for a number of years. While end-user demand for broadband access and services that are enabled by these connections continues to grow, operators are investing to upgrade their networks while transforming their organizations to become multiplay providers. IDC's *European Consumer Broadband Services* program will analyze the development of consumer communications and content services, size the opportunities, investigate the competitive environment, and explain how your business can capitalize on it.

## Markets Covered

This service covers the following market segments:

- Consumer broadband access service offerings, including DSL, cable, FttH, and WiMAX
- Fixed-line voice services — VoIP (voice over broadband, PC-based VoIP) versus traditional voice
- Content services, such as digital TV, VoD, online video, music, and gaming
- Next generation access — PON, VDSL2, DOCSIS 3.0

## Subjects Analyzed

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

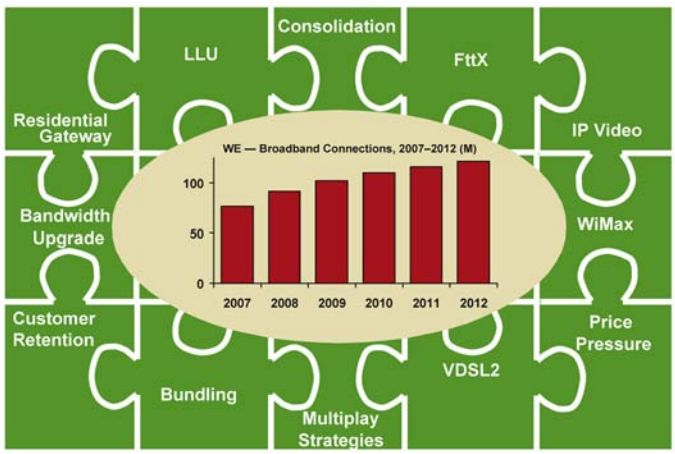
- Consumer strategies — convergence, bundling, and customer retention, among others
- Service provider business transformation — evolution from single play to multiplay providers
- Analysis of the competitive landscape, including successful service provider strategies
- Positioning fixed versus mobile broadband (complement or substitute)
- Subscription and revenue forecasts for broadband, voice, and content services
- Emerging business models, such as advertising funded

## Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. What will the opportunities be for service providers in the consumer space in Western Europe over the next five years, and how big will they be?
2. What will the key drivers and inhibitors of demand be for consumer broadband services?
3. How can operators defend their traditional business, while leveraging the capabilities of their broadband access networks?
4. How can service providers maximize revenues from the provision of digital content?
5. How will broadband technologies develop and what will be the role for emerging technologies such as WiMAX, PON, active Ethernet, and VDSL2?
6. What strategies will be the most successful among the broadband service industries?

## European Consumer Broadband Market Dynamics




Source: IDC

## Competitive Analysis

IDC's *European Consumer Broadband Services* program examines how providers are positioning themselves to compete in the European consumer broadband market. This service reviews strategies, market positioning, and future direction of several players, including:

Alcatel-Lucent, Allied Telesyn, Ambit, AOL, Arcor, Arris, AVM, Belgacom, BT, Carphone Warehouse, Cisco Systems, Clearwire, Deutsche Telekom, D-Link, ECI Telecom, Eircom, Elisa, Ericsson, Fastweb, free, Forthnet, Fujitsu Telecom, Google, HTV, Huawei, Inquam Broadband, Jazztel, Kabel Deutschland, KPN, Microsoft, Motorola, Nokia Siemens Networks, Netgear, Neuf-Cegetel, Numericable, ONO, Orange, OTE, Premiere, Portugal Telecom, Sagem, Samsung, Scientific-Atlanta, Siemens, Sky, Sonae, sunrise, Swisscom, TDC, Tele2, Telecom Italia, Telefónica, Telekom Austria, Telenet, Telenor, TeliaSonera, Thomson, Tiscali, T-Online, United Internet, Unity Media, UPC, UTStarcom, Virgin Media, Vodafone, Walt Disney, Wind, Yahoo, ZON, ZTE, and ZyXEL.

## 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:

***European Broadband Services Market Analysis, 2009–2013***
This study investigates the drivers and inhibitors of broadband service take-up in 16 countries. Five-year forecasts of broadband access connections and revenue are provided, split by technology and by business and consumer.

***Content Strategies for Broadband Operators***
This study analyzes the opportunities and threats for broadband operators in the broadband content space. It includes forecasts for different content services, including IPTV.

***Redefining the Fixed Line: Evolution to an All-IP Environment***
This study examines the strategies that operators can implement to defend their traditional business, while at the same leveraging the capabilities of their broadband access networks.

***Western European Next Generation Access Market Analysis, 2009–2013***
This study analyzes the deployment of the next generation of access technologies in broadband networks, including VDSL2, PON, active Ethernet, and DOCSIS 3.0.

## 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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