



The Future of Mobile Communications

New communication methods to preserve revenue growth

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The mobile communications market is largely seen as having passed its growth phase, entering a state of saturation, as well as a negative trend in mobile revenues. This report will focus on communication, even if the mobile phone today can do so much more than communicate, as well as on the new methods of communication: SMS, VoIP, IM, social networking,

...

Key questions

- What do the users want?
 - What are the main challenges for the operators?
 - What's going to happen to voice?
 - To what extent will mobile instant messaging cannibalise SMS?
 - May Telecom operators become mobile social networking facilitators?
 - What are the key success factors for the RCS initiative?
 - Which scenario for the future and where do the operators position themselves?
- > Countries analysed:
France, Germany, Italy, Japan, Spain, UK, USA





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New communication methods to preserve revenue growth

1. Executive Summary

2. Introduction

- The falling mobile revenue growth
- New communication methods to preserve revenue growth

3. The End of the Mobile Voice Eldorado

- 3.1. Increasing dependency on data revenue
- Data revenue showing better annual growth rate compared to voice
 - ...and data revenue shares are increasing at the expense of voice
 - ...and finally, comparison of ARPUs confirms the trend
- 3.2 The need for new richer communication methods
- SMS accounts for the lion's share of data revenue
 - ... but SMS alone cannot sustain revenue growth
 - ...hence the need for new communication services

4. What the Users Want

- 4.1. Looking at the fixed Internet
- 4.1.1. Instant messaging: usages differ between countries and age groups
- 4.1.2. Social Networking services: the new way to communicate online
- 4.1.3. IM challenged by social networks
- 4.1.4. New forms of communication coming into play
- 4.2. Communication usages: diversity and growth
- Frequency of use
 - SMS is more used than the Internet...
 - Importance of vocal communication
 - Importance of mobile communication
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- 4.3.1. Terminal trade-off: laptop + mobile phone is the perfect combination
- 4.3.2. Address book functionalities: presence features expected
- 4.3.3. Key demands of end users: advanced features and unlimited usage

5. The Current Challenges for the Operators

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- 5.1.2. Partnering with giants or working alone
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- 6.1.3. The handset interoperability dilemma
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- 6.1.5. Controlling the price and service
- 6.1.6. Roll-out schedule; not just a myth
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Actors Analysed & Case Studies

- 3 • AT&T • bebo • Bouygues Telecom
- E-Mobile • E-Plus • Facebook • Itsmy • KDDI
- Movistar • Myspace • NTT Docomo • O2
- Orange • SFR • Skype • SoftBank • Sprint • TIM
- T-Mobile • Twitter • Verizon • Vodafone • Wind
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70 pages
 Paper: 2 900 EUR
 PDF: 3 500 EUR
 March 2009

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