

Fixed-Mobile Convergence

Global Overview: FMC is on the rise despite the economic downturn – 2022

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Definitions

- This report looks at global service providers' fixed-mobile convergence (FMC) activities and the three levels of convergence as defined by Omdia's [*Service Provider Fixed-Mobile Convergence Tracker – 2022*](#):
 - **Corporate-level FMC.** A company is converged at this level when it owns mobile, fixed, and TV or over-the-top (OTT) assets. A fixed-line or fixed-TV operator is also considered converged if it offers mobile services via MVNO agreements.
 - **Commercial-bundling-level FMC.** A company at this level offers bundles for customers to purchase that give them a cost benefit over purchasing the services individually from the operator. The fixed, TV/OTT, and mobile bundle must include a mobile subscription, which excludes any single-play and any dual- or triple-play bundles that include only fixed-line and TV/OTT services.
 - **Technology-level FMC.** This level of convergence shows that the company owns a hybrid fixed-broadband product. Fixed-mobile convergence takes place at the technology level when the company offers a so-called hybrid service with technologies such as LTE/5G and DSL converged.

Omdia view and recommendations

Omdia view (1)

- **FMC penetration continues to increase across regions.** FMC has become a core pillar of service providers' consumer strategy across different regions. The adoption of FMC is increasing on the back of fixed broadband growth, easing of the competitive regulatory framework and market liberalization. All participants of the TMT ecosystem realize the importance of economy of scale. Large converged multiservice operators are in a better position to facilitate investment in network infrastructure than their x-only counterparts (companies that provide only one type of service). There has been a rise of large TMT groups (e.g., the United Group, Liberty Global, and 4iG) that continue to engage in M&A activity, acquiring multiple fixed and mobile assets across the regions despite a rapid deterioration of growth prospects across the world.
- **Discounting is still at the forefront of the agenda, but it is not a sustainable strategy over a long period of time.** Bundling is often incentivized with heavy discounts during the introduction stage, which makes a deal more lucrative for a telco's customers. However, some markets with high FMC penetration (e.g., France) have started to gradually move away from heavy discounting to avoid escalating price wars. This has led to a slight reduction in the number of FMC accounts.
- **Service providers will find it hard to navigate the cost-of-living crisis and other economic threats.** If service providers start readjusting their FMC tariffs, we will see a higher level of churn and reduced revenue from FMC bundles as consumers may turn to buying single services unless operators offer a significant cost benefit over purchasing services individually. However, this will not affect long-term FMC growth prospects as operators will be able to readjust pricing strategies to factor in the cost-of-living crisis.

Omdia view (2)

- **Why is FMC trending?**
 - **Reduced churn** through improved customer loyalty.
 - **Lower marketing costs** and reduced customer handling time, leading eventually to **opex savings**.
 - **Higher ARPU** when FMC products mature. Telcos tend to offer heavy discounting to increase uptake when bundles are introduced, which initially brings ARPU down. However, once the discounting period ends, operators can benefit from upselling and cross-selling to extract higher value from bundles.
 - Bundling helps to **preserve the value of low-cost products** such as voice and SMS.
 - Bundling facilitates **growth of 5G and fiber penetration**. When telcos bundle 5G and broadband together this prevents customers from going mobile-only, so bundling **helps to avoid the 5G threat** to broadband.

Recommendations

Converged service providers

- **Move away from discounting but don't forget the cost-of-living crisis. Prepare for growing inflation and other economic threats.**
Discounting at the introduction stage is crucial to ensure high uptake of FMC bundles, but operators need to develop strategies that allow them to move away from continuous discounting without increasing churn. Operators must also learn how to navigate the cost-of-living crisis and introduce relevant pricing strategies to stimulate the uptake of bundles during the economic downturn.
- **Facilitate partnerships beyond connectivity (e.g., insurance and financial services, etc.).**
Telcos need to create new alliances with third-party providers to enrich their bundles and diversify their content to navigate constantly changing consumer preferences and gain competitive advantage.

Government/regulator

- **Encourage TMT M&A activity.** Governments (particularly those located outside Europe) must facilitate growth of M&A activity that would help telcos to implement innovative technological solutions, and drive fiber and 5G uptake. Authorities should work on more practical legislative proposals for various participants of the digital ecosystem, including telecom companies, and reduce the risk of continuous uncertainties. This will help to make the TMT M&A transaction process clear, comprehensive, and appealing for all parties.

X-only operators

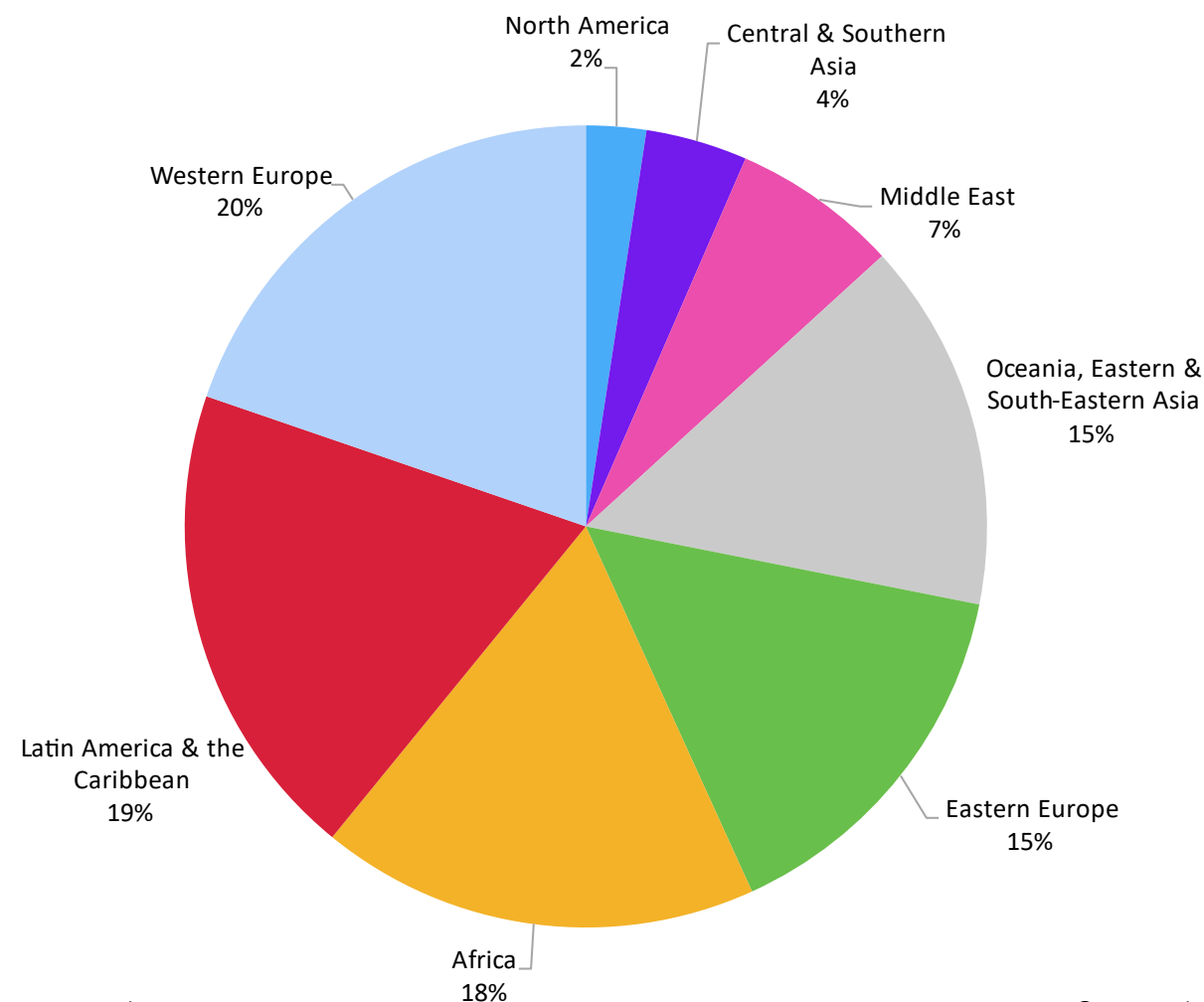
- **Fixed-line service providers consider securing mobile network access via MVNO agreements.**
This will enable standalone fixed-line service providers to bundle fixed and mobile services into multiplay deals. X-only operators should work on relevant strategies to stay competitive in a service provider landscape that is becoming increasingly converged.

Corporate-level convergence

Corporate-level FMC growth is powered by increasing consumer demand and a drive to reduce opex

- Omdia estimates that a total of 538 operators – 59% of all operators worldwide (+5% percentage points YoY) – had both fixed and mobile assets at the end of 1H22. Cash-rich TMT players continue to execute their inorganic growth strategies via M&As despite increasing economic headwinds.
- **Global convergence is backed by continuous growth in M&A activity supported by ever-growing consumer demand and a drive to benefit from cost efficiency.** Consolidation allows operators to gain the necessary scale to accelerate fiber and 5G rollout, enrich their bundling propositions, and significantly reduce operating costs.
- **Europe remains the most attractive region for corporate-level FMC.** Of 538 converged companies worldwide, 188 are in Europe; and of 235 telcos in Europe, 80% are fully converged. The increased convergence in the region is supported by a sustainable regulatory environment. M&A activity is also trending in other regions as more favorable policy conditions are being created by local policy makers.

Converged at a corporate level, % of countries, 2022



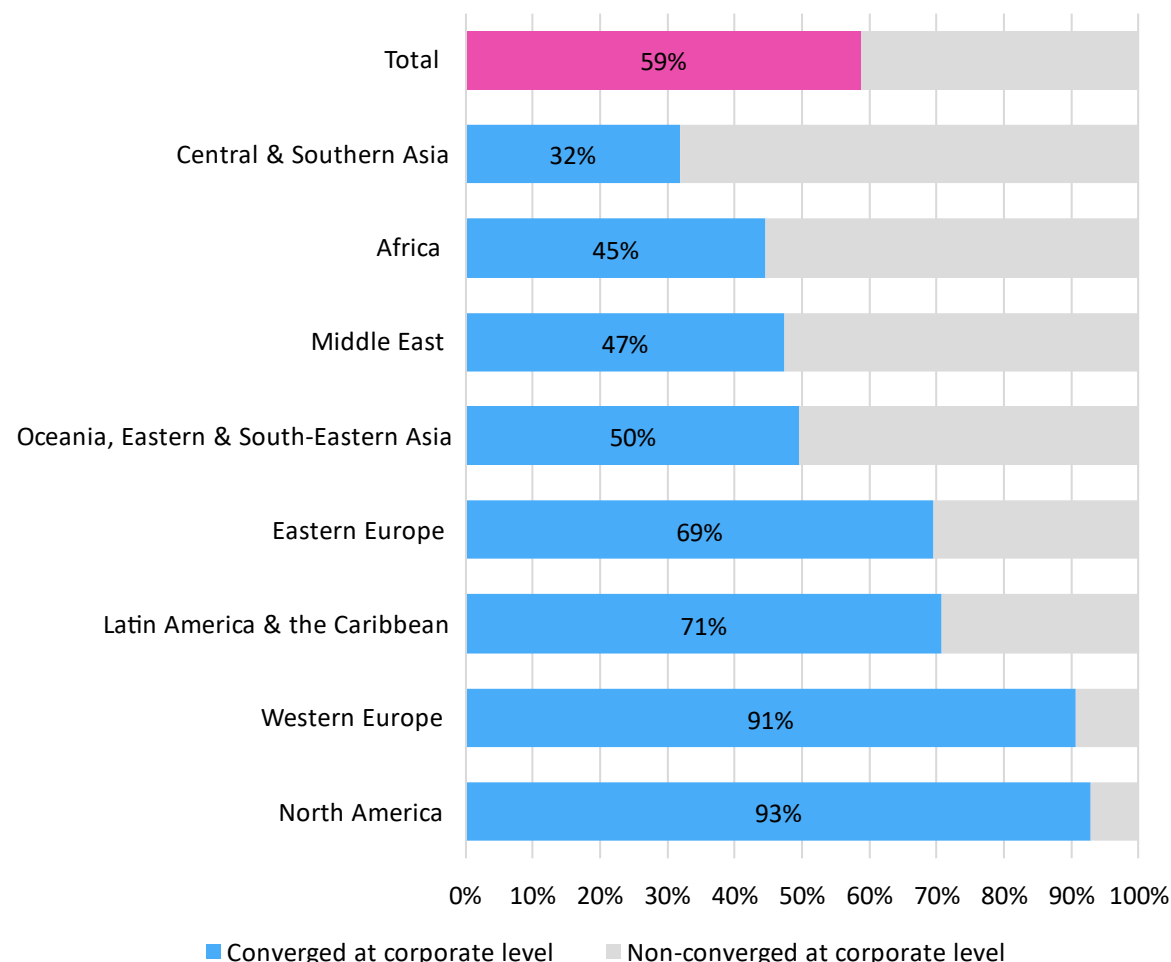
Source: Omdia

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TMT players continue to engage in cross-border and in-market M&A deals (1)

- In April 2022, Iliad Group-owned Polish mobile operator Play acquired the assets of the fixed-line operator UPC Polska from Liberty Global, which created one of the largest multiservice operators in Poland. The telco noted that the deal can help to redefine convergence for the benefit of its customers.
- 4iG, a regional telecom group, has gone on a buying spree in Eastern Europe to become a new major regional player. The telco brought several telecom operators under its ownership:
 - In January 2022, 4iG acquired Hungarian operator Digi Communications
 - In February 2022, 4iG reached an agreement to acquire a majority stake in state-owned infrastructure operator Antenna Hungária, aiming to combine the group's service and infrastructure operations in Hungary to facilitate infrastructure rollout and create better value propositions for its customers
 - In March 2022, 4iG acquired the assets of Albanian mobile operator, ONE Telecommunications and multiplay provider ALBtelecom. The recent takeovers established 4iG as one of the regional market leaders and enhanced its role as a multiplay leader across several countries.

Split of converged versus non-converged at corporate level, by region, 2022



Source: Omdia

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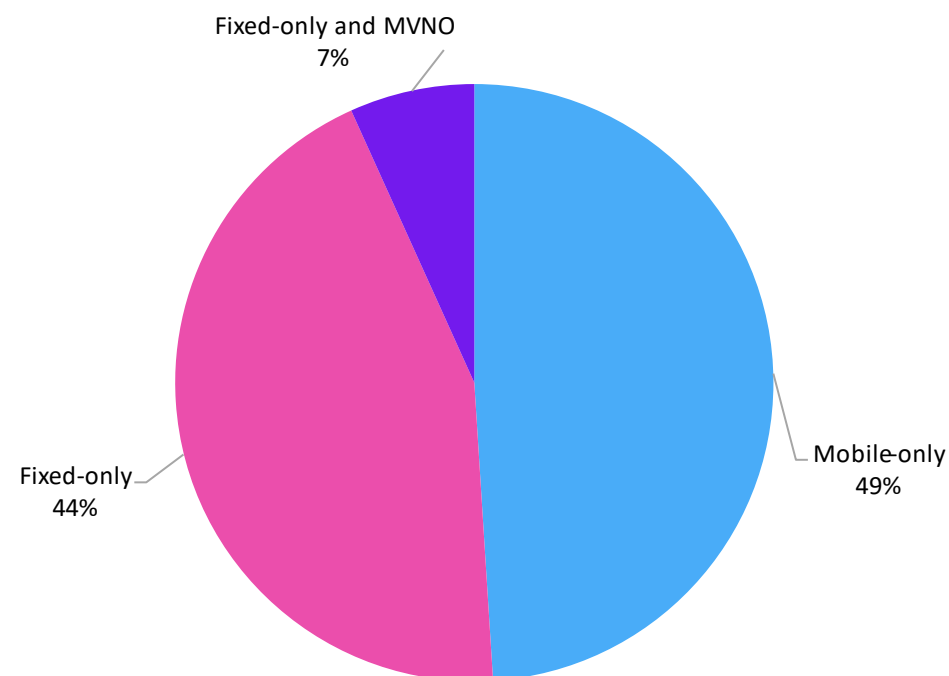
TMT players continue to engage in cross-border and in-market M&A deals (2)

- Telcos often turn to **inorganic growth strategy and partnerships to thrive in a competitive market environment**. This allows them to benefit from economies of scale and strengthen their capacity to provide better networks and enrich their consumer offerings with innovative content:
 - In September 2022, the Malaysian authorities cleared the proposed merger of Digi Telecommunications (a subsidiary of Telenor) and Celcom (an Axiata Group company). The transaction is expected to close within a year and will create one of the largest multiservice providers in Malaysia
 - In July 2022, Orange Spain and Másmóvil signed an agreement to combine their operations in Spain under a 50:50 venture in a deal valued at close to €19bn. The merger will leverage the telcos' opportunity to drive convergence and digitalization in the Spanish market. Orange Spain's revenue has been declining for several years due to an increasingly competitive environment.
- While dealmaking generally remains strong, some regions have inevitably been hit hard by economic uncertainty triggered by the pandemic and the Russia-Ukraine war. This will delay infrastructure development projects and may **push some operators out of certain regions/countries** as they will struggle to survive a recession and endure economic headwinds. **This may slow down the progress of convergence in some regions.**
 - In September 2022, Uganda's third largest operator, Africell, closed its operations in the country allowing its subscribers to migrate to MTN and Airtel's networks. The telco stated that it had reassessed its viability in the market based on its revised long-term commercial outlook for its African business.

X-only operators will find it hard to thrive in a landscape dominated by converged operators

- According to Omdia's figures, 44% (402) of telecom operators worldwide are x-only operators. While telcos are focusing on the development of fixed and mobile infrastructure it is important to note that these projects are capital-intensive and therefore x-only operators have **reduced opportunities for growth** compared to large multiservice operators.
- Customers will be increasingly searching for discounted FMC deals while the **cost-of-living crisis** continues to rage across global markets. X-only operators will not be able to deliver the same value proposition to customers as their multiservice counterparts.
- As large telecom groups continue to build at scale and support their expansion via inorganic growth, small x-only operators remain under threat. For example, in Bulgaria, Vivacom's holding company, the United Group, and A1 Group have placed inorganic growth at the heart of their expansion strategy so several regional ISPs have recently been acquired by these telcos.
- Omdia predicts that an increasing number of x-only operators will be pushed into consolidation as economic uncertainty puts **infrastructure and price-based pressure** on x-only operators.

Global, number of x-only operators, 2022



Source: Omdia

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- Fixed-only operators* may also find it useful to secure mobile network access via an MVNO agreement in order to gain competitive advantage. Omdia counts 27 fixed operators worldwide that provide mobile services via an MVNO agreement.

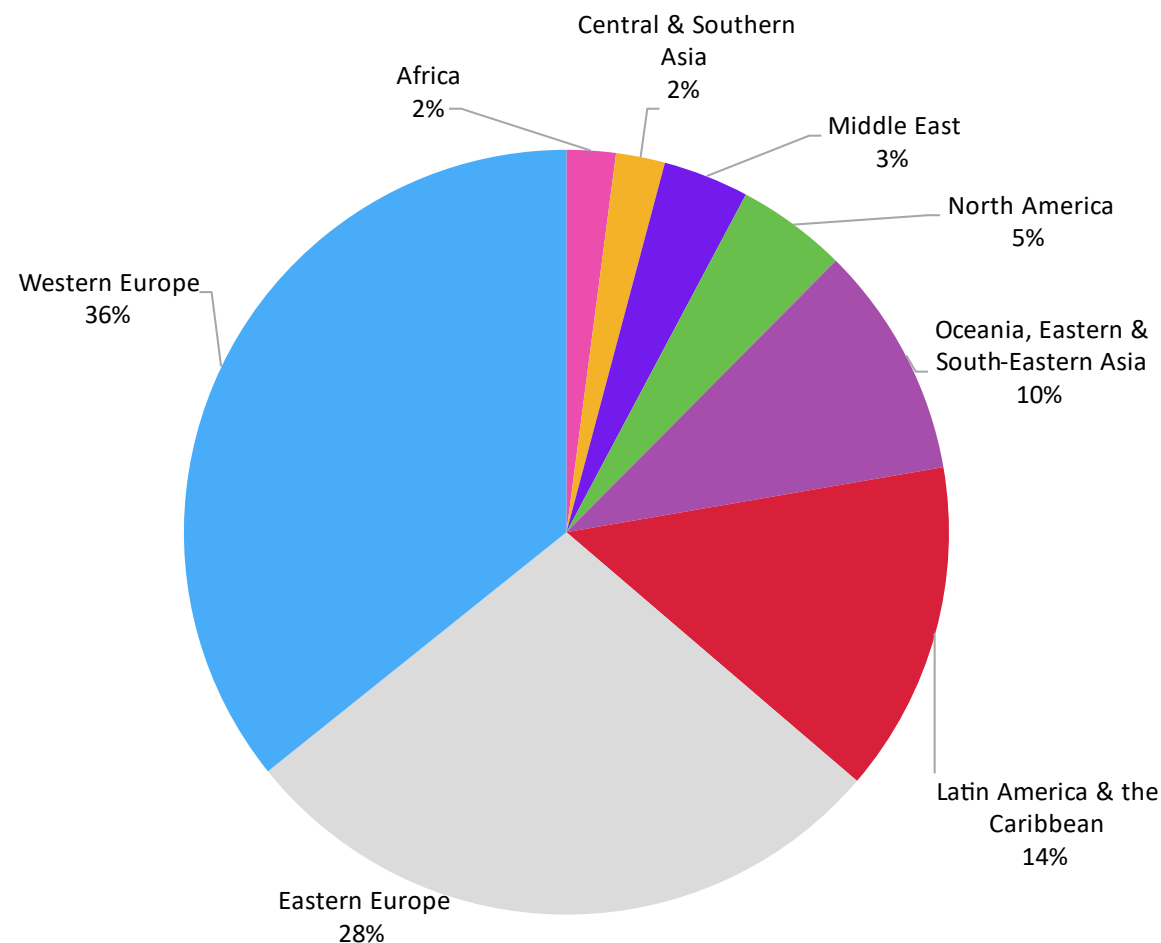
Note: *For the purpose of this section only, a fixed-only operator provides fixed broadband or fixed broadband and TV/OTT, thus excluding TV/OTT-only operators.

Commercial- bundling-level convergence

Bundling is trending but subject to a strong regional disparity

- Operators do not always take advantage of existing converged assets as only 36% of all operators converged at corporate level offer FMC bundles.
- However, the overall penetration of FMC bundles is growing in most countries: commercial bundles are offered by 193 companies, which is 21% of all operators globally at end-2Q22 (+2 percentage points YoY):
 - Globally, Europe has the largest share of commercial-bundling-level convergence due to the concentration of FMC operators and growing broadband coverage. Price-based competition urges operators to offer inventive bundling propositions
 - Meanwhile, bundling penetration is nearly absent in Central & Southern Asia and Africa because of low broadband penetration and the high cost of fixed-line services. Operators rarely offer bundles, and their uptake is low as bundling remains affordable only to selected high-end customers.

Converged at commercial level, % of countries, 2022



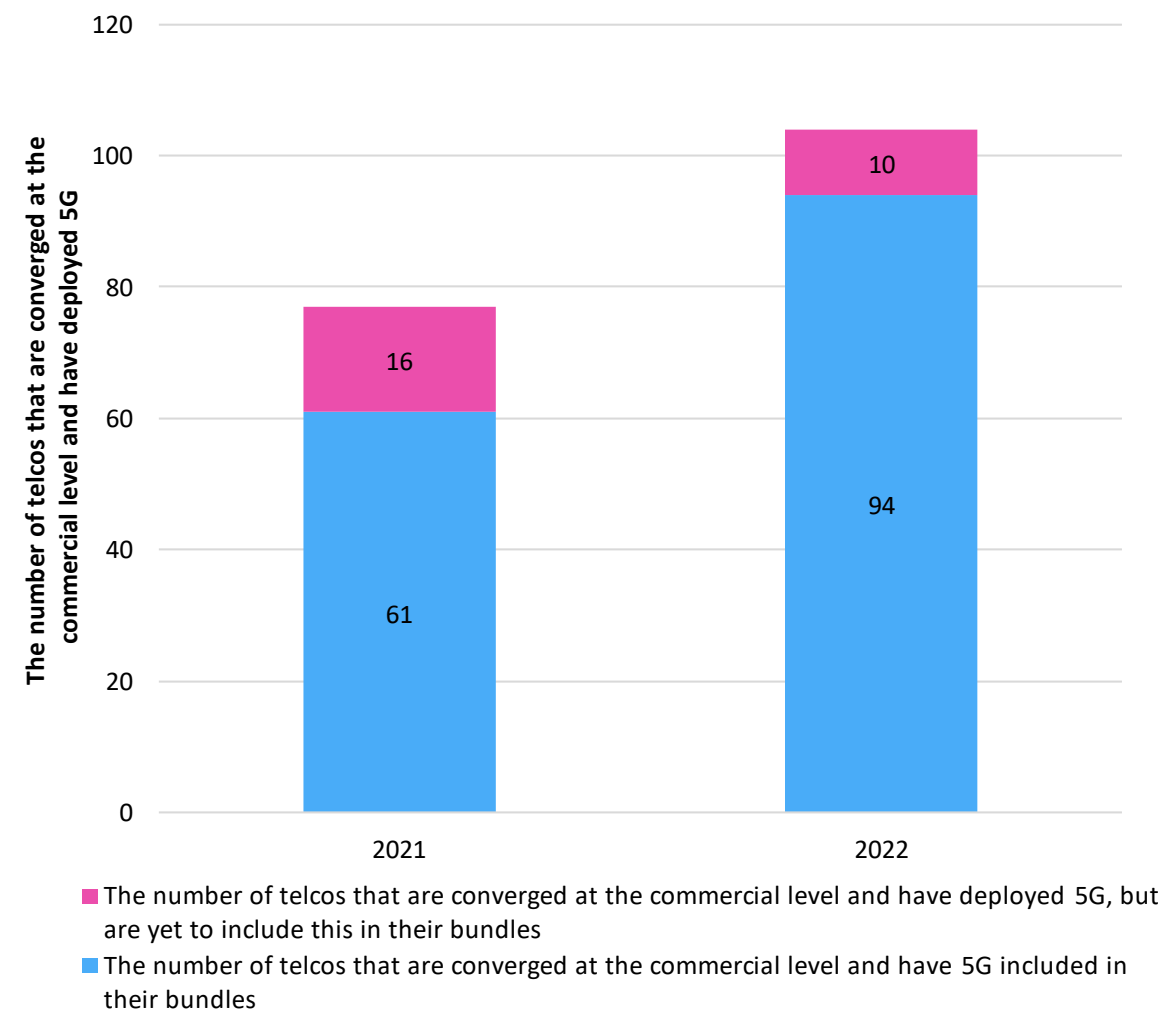
Source: Omdia

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5G's role in multiplay bundling is growing

- Omdia estimates that 90% of telcos that have deployed 5G and are converged at a commercial level have already included 5G in their FMC bundles. As operators seek to further accommodate consumer demand for good connectivity, 5G allows delivery of innovative services (e.g., gaming) that will be particularly appealing to millennials and Generation Z.
- Operators also offer various 5G device discounts in their FMC propositions to leverage network migration opportunities during the device upgrade cycle.
- Bundling 5G can also help to lock high-value customers into lengthy contracts. In this case, hard bundling (whereby the cost of subscription for all services is introduced in one bill for the duration of the contract) can serve as an effective anti-churn mechanism.

5G and commercial-level bundling, 2021–22



Source: Omdia

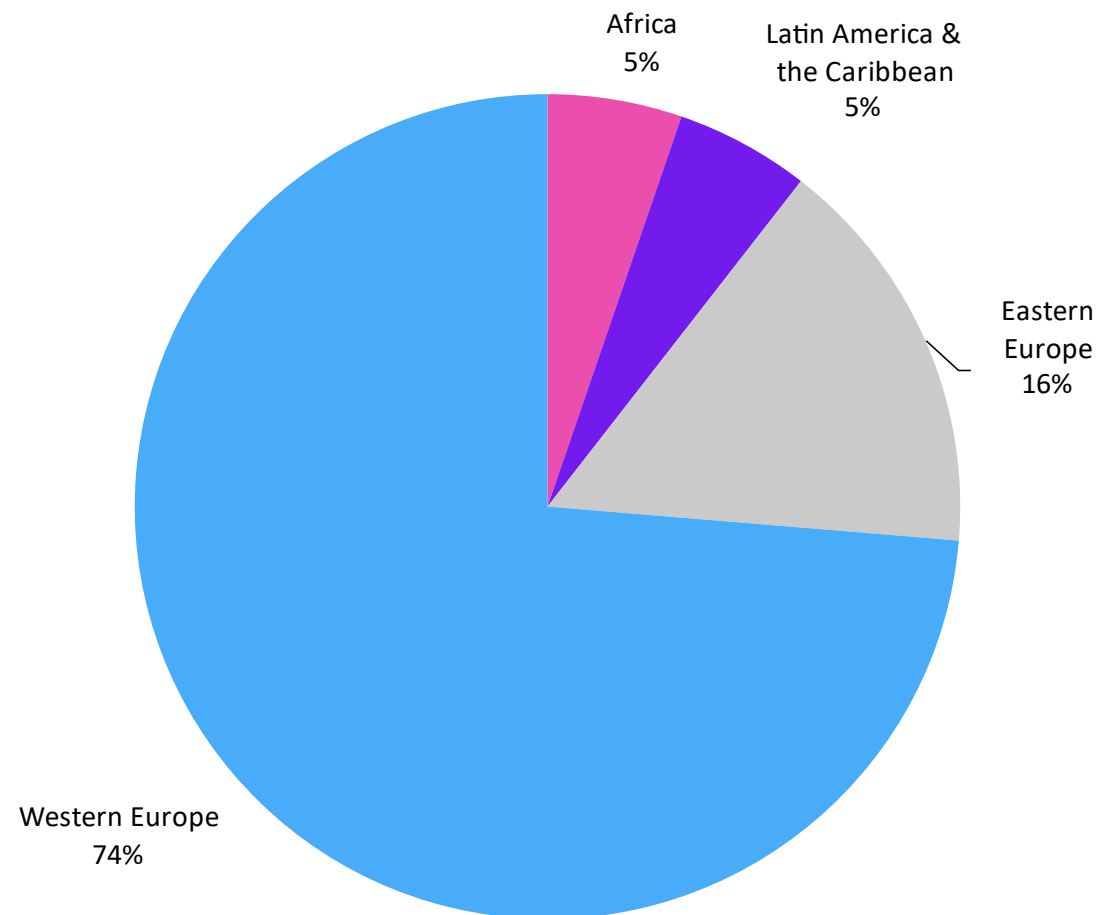
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Technology-level convergence

Technology-level FMC penetration remains low (1)

- Europe has the highest number of tech FMC products, as many countries in the region bond 4G/5G with broadband to facilitate seamless connection and improve the end-user experience. Tech FMC solutions often use combinations of DSL/cable and 4G/5G. Fiber connection is rarely used in tech FMC as fiber offers a reliable and fast connection on its own.
- Tech FMC may lose its appeal over both fiber and FWA alternatives, which are increasingly being deployed in Europe. Nevertheless, tech FMC can serve as a cost-effective solution for legacy-heavy markets where fiber and FWA deployment is not commercially viable.
- Tech FMC is not being introduced in other regions as emerging markets often leapfrog legacy technologies. There is also a growing tendency toward substitution of fixed-line access by mobile broadband. The trend is driven by the evolving mobile tariff pricing across regions whereby operators are reducing the average price of mobile data.

Converged at technology level, % of countries, 2022



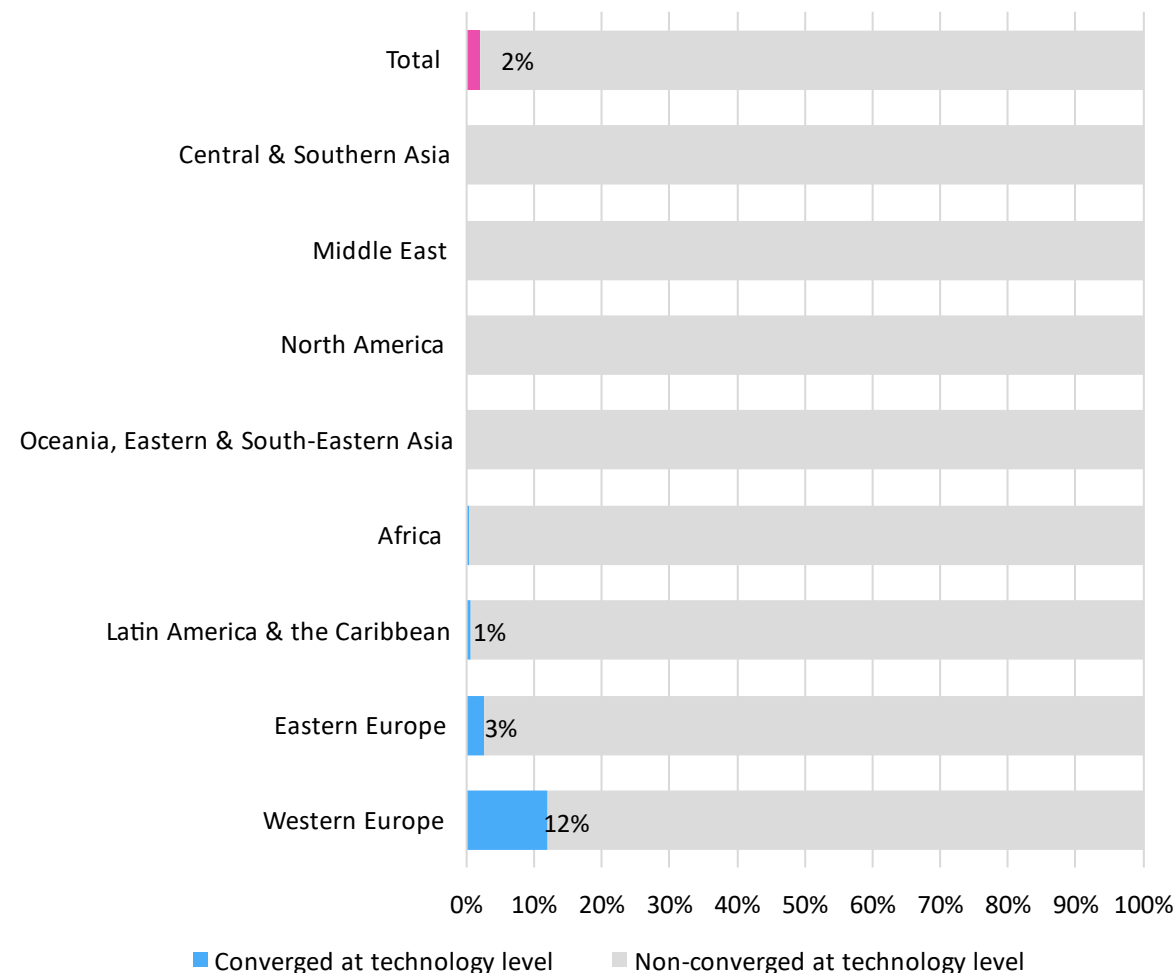
Source: Omdia

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Technology-level FMC penetration remains low (2)

- Technology-level FMC remains low across the world, with Europe leading.
- Tech-converged devices are gaining popularity in areas where it is difficult to achieve fiber deployment and the mobile network suffers from capacity limitations.
- New working-from-home trends drive the need for a strong broadband connection, increasing demand for hybrid devices.
- Hybrid devices are not mainstream products yet, so they are being sold at a premium, making them affordable for high-income customer segments only (e.g., customers in rural areas of Western Europe).

Split of converged versus non-converged at technology level, by region, 2022

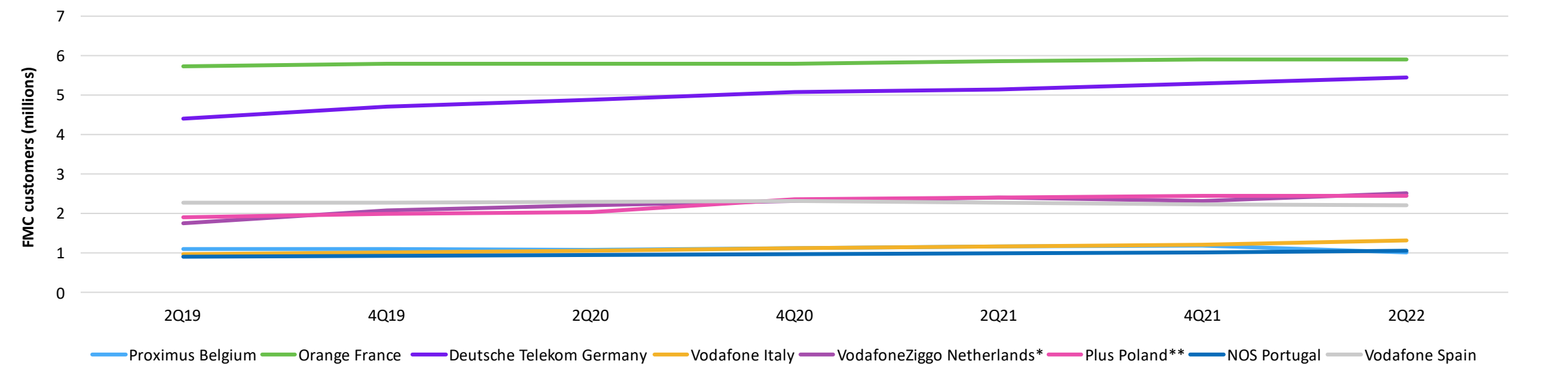


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FMC customer base is growing across multiple European countries

FMC customer base, selected European operators



*Convergent households
** 2022 and 2022 data includes Netia Group and Premium Mobile customers
Source: Omdia

- In line with the gradual decline in x-only services uptake, the number of converged accounts is growing for many operators in Europe. Service providers continue to offer bundles at discounted prices and aggregate connectivity and innovative digital content in their propositions, making it more appealing to purchase services as part of a multiplay bundle.

Service providers' best practices: FMC strategies and products

Convergence in the UK is hitting new milestones

- Convergence in the UK has been undeveloped due to a lack of competition in the fixed wholesale segment. However, FMC in the UK took off following the merger of BT and EE in 2016. In 2022, the telco introduced a tech FMC product, *Halo3+*, which runs on both the 4G and DSL networks.
- BT states that premium customer care and a top-level user experience are at the heart of its consumer strategy and the telco includes Home Tech Experts support for free in its FMC proposition. BT reported that its FMC households grew to 21.8% at the end of 2Q22 (+0.3 percentage points YoY).
- In October 2021, newly merged Virgin Media O2 launched a converged bundle called Volt. In 2022, the telco launched a new converged 4G and fiber-bonded tech product, *Voom Gig1*, mainly targeting its business customers.
- Neither BT's nor Virgin Media O2's FMC deals offer significant monetary discounts. However, customers can get double mobile data on their plans.
- In 2022, Sky UK launched Sky Connect Business Broadband, which is run on the Sky Mobile MVNO (over O2's network) and Sky's DSL network. The product is also mainly targeting the telco's business customers (e.g., small and medium-sized enterprises).
- The announcement in October 2022 that Vodafone Group is in merger discussions with Three UK indicates the emergence of a new converged multiservice operator that will further heat the increasingly competitive market environment. Omdia predicts that FMC penetration in the UK will continue to rise on the back of the market consolidation.

Convergence in the UK is hitting new milestones: *Halo* UK business broadband

BT: *Halo* for Business

- DSL+4G bonding
- Minimum speed guarantee
- Digital phone line
- Guest Wi-Fi Hub
- Content Controls and Web Protect alert
- Free static IP
- Tech support
- Starting price: £33.95 per month for 24 months

Virgin Media Business: *Voom Gig1*

- Fiber+4G bonding
- Commitment to solve issues within 12 hours timeline
- Five free static IPs
- Phone line with unlimited UK calls
- Starting price: £67 per month for 24 months

Sky Connect Business Broadband

- DSL+4G bonding (O2's mobile network)
- Digital phone line with unlimited UK calls
- Starting price: 24-month contract: £29.95 per month for 12 months: £39.95 per month after (additionally, customers need to pay £12 delivery, £79 installation, and £99 Openreach installation)

- Legacy infrastructure still dominates the market in the UK and the country remains firmly in the lower regions of the fiber penetration ranking with 9% fiber penetration at end-2Q22. For comparison, in Spain and France fiber penetration reached 80% and 50% respectively at end-2Q22. Operators in the UK have been quick to fill network gaps in the market with their tech FMC offerings.

Proximus Belgium: *Flex* convergence

- All telcos in Belgium emphasize the importance of convergence as a defensive mechanism against their competitors. Heavy discounting is at the forefront of FMC strategy in the Benelux countries.
- The prominent feature of Proximus's *Flex* converged product is its flexibility, as the telco allows its customers to build a customized plan by choosing a mobile data package and a third-party TV/OTT service from a large variety of options.
- Various products and services can also be added optionally, and this improves the overall customer experience, driving opportunities for cross-selling and upselling.
- The telco does not tie its customers into long-term contracts and allows them to modify their subscription choices at any time online.
- Proximus is increasingly relying on third-party content aggregation. This has facilitated the growth of the telco's triple-play (mobile, fixed broadband, and TV/OTT) customer base by 23% YoY at end-2Q22. The telco uses its own TV platform, *Pickx*, for the third-party entertainment content aggregation.

Proximus Belgium: Number of FMC customers



Source: Omdia, Proximus Belgium

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Free France: Emergence of a market disruptor

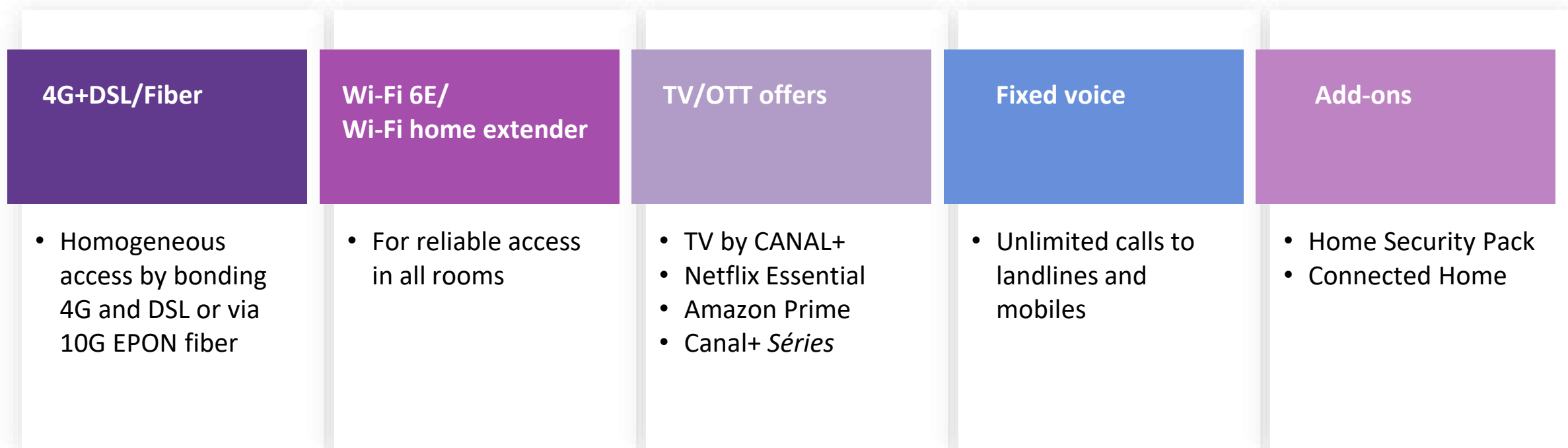
- Rapid development of FMC in France was triggered by the emergence of a new operator, Free.
- In 2003, Free launched its most basic converged fixed broadband, telephony, and TV bundle at the lowest price available at that time on the market (€30 per month). Since then, the operator has been rapidly gaining its market share in the broadband segment. Following its acquisition of a mobile license in 2009, Free entered the French mobile market with attractively priced FMC bundles, triggering fierce competition in France and pushing the other telcos' tariffs down. Free's competitors had to counter the challenges by offering discounted bundled products.
- Free's FMC offering allows customers to pay for all fixed and mobile subscriptions via a single discounted bill, which significantly improves the overall customer experience.
- While customers are given an option to cancel their mobile contract with one month's notice, the minimum term for the fixed-broadband service (FreeBox Révolution) is 12 months. This way Free Mobile ensures a long-term fixed broadband contract commitment, thus protecting its fixed services from the threat posed by the arrival of 5G.



Source: Omdia, Free

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Free France: Evolution from commercial bundling to tech FMC – FreeBox Delta



Source: Omdia, Free

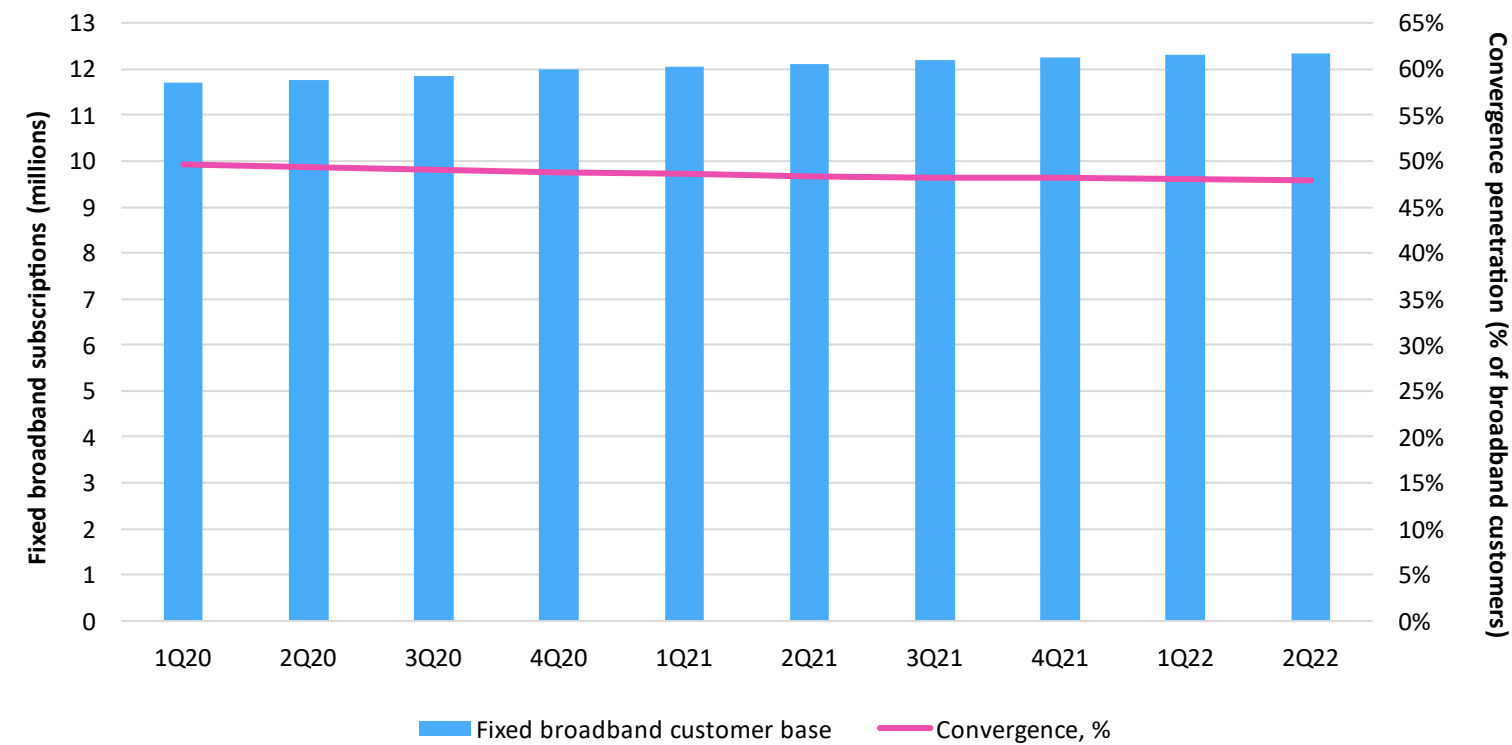
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- In recent years, Free has shifted its focus from gaining market share with low-price offerings to **adopting an innovation strategy**. At end-2018 the telco launched a number of innovative converged products, including a tech hybrid access device, FreeBox Delta, which combines 4G and DSL for fast network access topped up with such features as Netflix, home security, and many others, all packed into one compact product at €39.99 per month for one year (€49.99 per month after one year).

Has convergence peaked in France? (1)

- While Orange’s mobile revenue growth has started to stall, its fixed broadband service revenue and subscriptions growth have been increasing gradually thanks to high non-bundled fixed broadband uptake in France. Meanwhile, the number of convergent customers as a percentage of the fixed broadband subscriber base has started to decrease, which is a sign that **Orange’s convergence growth has peaked.**

Orange France, fixed broadband customer base and convergence penetration, 1Q20–2Q22



Source: Omdia, Orange

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Has convergence peaked in France? (2)

- While Orange is the only converged operator in France that fully discloses FMC KPIs, there are signs that **convergence has peaked in France** as operators have started to move away from offering heavily discounted FMC packages **to avoid triggering full-blown price wars that often lead to revenue erosion**. Free remains the only operator to date in France that continues to offer unlimited data in its FMC packages.
- Arcep (the French telecom regulator) reported that the number of converged SIM cards in France grew 3% YoY at end-1Q22 as operators offer an option to add multiple mobile contracts for each broadband subscription to lock in whole households, which in turn drives convergent SIM numbers up. The number of convergent SIM cards as a percentage of the total SIM base in France remains stable at 28%.

Number of converged SIM cards in France (millions), 1Q20–1Q22



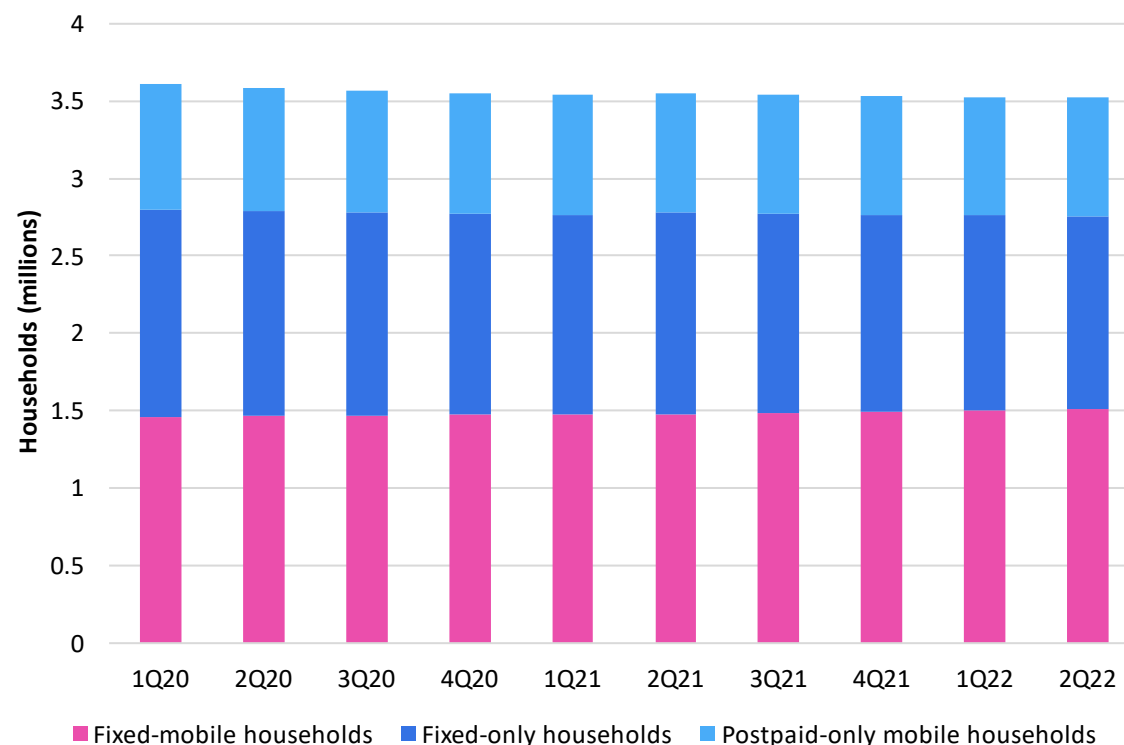
Source: Omdia, Arcep

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KPN Netherlands: Convergence is in the spotlight

- KPN has a simplified tariff structure and customers are incentivized by significant price discounts.
- Customers have a single touchpoint when dealing with billing.
- Unlike its European counterparts, KPN also offers FMC on its sub-brands, such as Telfort's combi offer with a €5 monthly discount, double mobile data allowance, as well as a €5 monthly discount on the Plus TV package or Fox Sports.
- Mobile and fixed-only household numbers are gradually decreasing in this competitive and saturated market, and FMC households grew by 2.5% YoY at end-1H22.

KPN Netherlands, total consumer households, 1Q20–2Q22



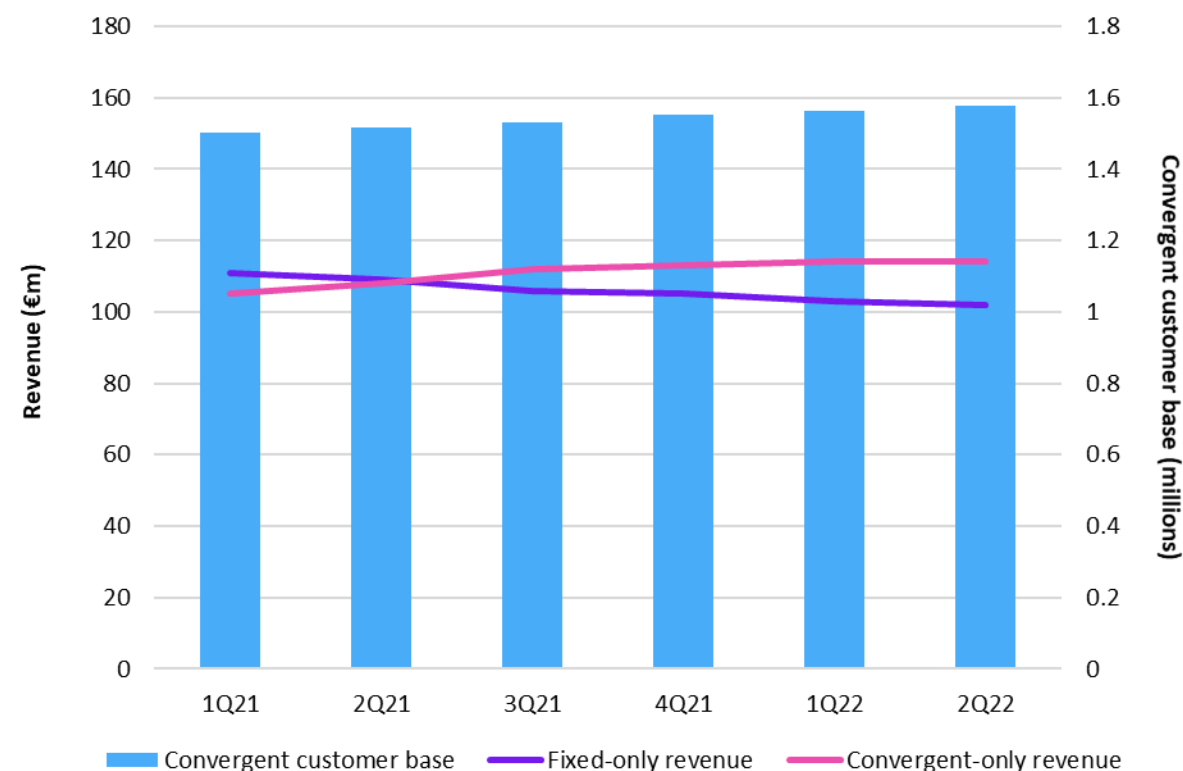
Source: Omdia, KPN Netherlands

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Orange Poland: *Love* convergence

- There has been a steadily growing tendency toward FMC following several large acquisitions in the TMT segment in Poland. The recent acquisition of UPC Polska by Iliad-owned Play will further intensify competition in the market, urging operators to offer more discounted bundles.
- *Love* is Orange's successful converged product that is helping to drive revenue as well as 5G and fiber adoption in Poland.
- The telco started to offer its *Love* bundles at zero cost for two months, but it also has several bundles that are sold online only. This strategy helps to reduce operating costs and negate the effect of heavy discounting.
- Product differentiation is another feature of *Love* bundles. The telco aggregates multiple third-party TV services as well as its own TV packages in its diversified range of offers. Orange also has a separate line of FMC offers with a Netflix subscription bundled in.

Orange Poland revenue and customer base, 1Q21–2Q22



Source: Omdia, Orange Poland

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AIS Thailand and True Corp Thailand: Rocking convergence in Thailand

- FMC is well established in Thailand. Two of the largest operators offer FMC packages as a tool to increase adoption of fiber, which is sold at a premium. Both operators use different strategies to promote their FMC packages:
 - True Corp Thailand has taken a hard-bundle “all-in” approach and offers a mobile and fiber bundle topped up with various entertainment features on one discounted bill. Omdia estimates that True Corp’s fiber penetration stood at 35% at end-2Q22, so the operator is actively encouraging FMC take-up and encourages DSL-to-fiber technology migration among its customers. Hence, DSL is not included in the discounted bundles.
 - AIS Thailand has adopted a slightly different approach and offers a 10% discount on its fiber packages for AIS mobile customers, thus promoting fiber take-up. AIS Thailand is a fiber-only operator.
- Competition has been intense in Thailand, so the operators offer discounted bundles to ramp up fiber uptake despite the growing risk of revenue cannibalization.

True Corp Thailand True Gigatex PRO bundle

- 15GB 4G/5G mobile data
- 1Gbps fiber
- TrueID TV Box
- Wi-Fi extender
- Option to adjust broadband speed
- 24-month service contract
- Cost of the cheapest offer: BAHT899 (\$24) per month. More expensive options are available

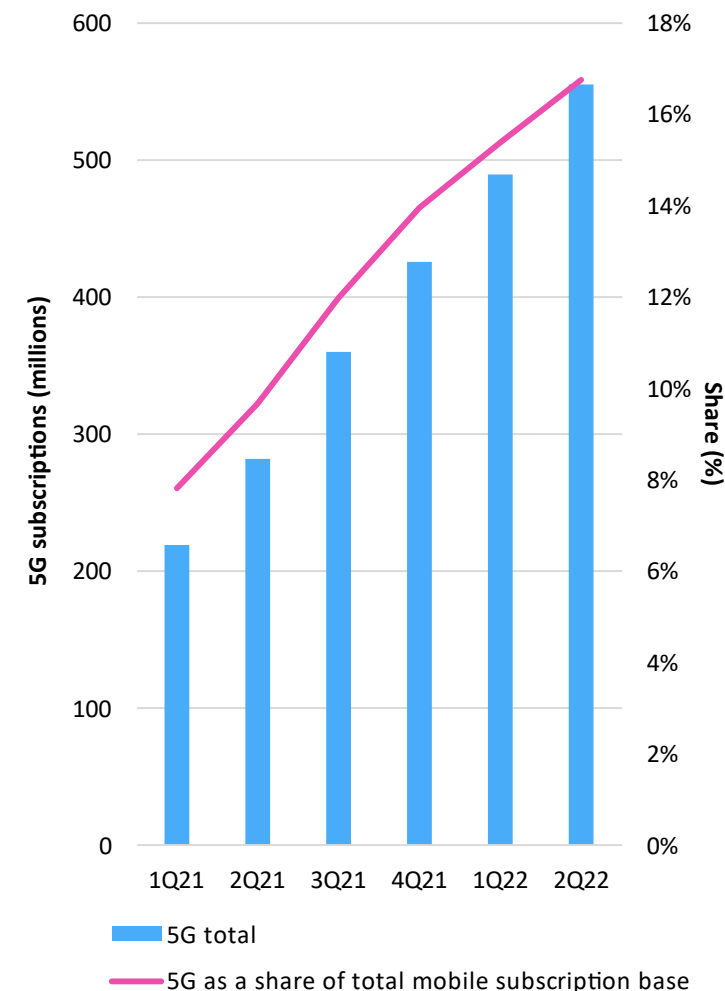
Source: Omdia, True Corp Thailand

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Bundling 5G and fiber is trending in China

- Chinese telecom operators China Telecom, China Mobile, and China Unicom offer multiplay bundles that have 5G and fiber included.
- The telcos use FMC as a tool to increase adoption of fiber and 5G:
 - China Mobile is hard-bundling 5G and fiber and offers a range of packages starting from CNY98 (\$14) per month. The telco offers some long-term commitment deals lasting up to four years. Customers can get 300Mbps of fiber for free if they spend at least CNY98 (\$14) per month on mobile
 - China Unicom also offers a basic 5G and 300Mbps plan starting from CNY79 (\$11) per month.
- Customers can choose from a variety of high-end plans, some of which include 1Gbps fiber options.
- Operators in China have taken a “small bundle” approach and offer mostly basic dual-play (fiber and 5G) services in their multiplay bundles. However, telco–OTT/TV partnerships are actively developing, backed by the easing of underlying regulations, which may give a boost to triple-play bundle adoption.

China, 5G subscriptions, 1Q21–2Q22



Source: Omdia

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Appendix

Appendix

Methodology

This report was prepared using a combination of primary research based on company interviews and secondary research derived from operator reports and announcements.

Further reading

[*Service Provider Fixed-Mobile Convergence Tracker – 2022*](#) (October 2022)

[*Fixed-Mobile Convergence Global Overview: 5G and fiber give a boost to FMC growth*](#) (December 2021)

[*Service Provider Fixed-Mobile Convergence Tracker – 2021*](#) (October 2021)

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E: customersuccess@omdia.com

8:00 – 18:00 GMT

Asia Pacific

E: customersuccess@omdia.com

08:00 – 18:00 GMT +8