

Fixed-Mobile Convergence Global Overview 2023: Has Convergence Growth Flatlined?

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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 – 2023*](#):
 - **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

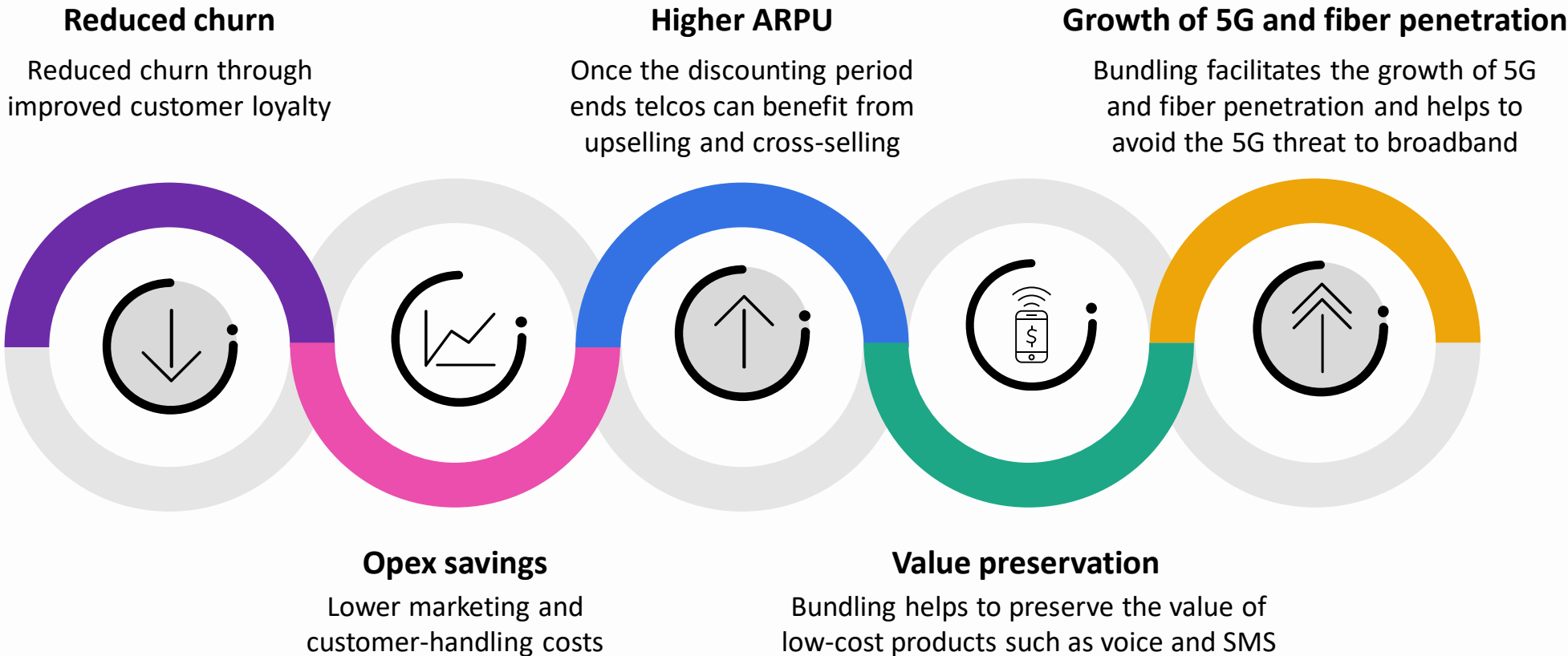
Omdia view (1)

- **Has telcos' enthusiasm for FMC cooled down?** The markets where FMC has been present for over a decade and reached a certain level of maturity have started to witness that the growth of their convergent subscriber base has flatlined. Telcos often engage in heavy discounting to increase uptake when bundles are introduced, which initially brings ARPU down. Yet continuous discounting is not sustainable. Once the discount period ends, some customers will switch deal/leave for a competitor, especially if a massive monetary discount is the main attraction for them. However, operators can now benefit from upselling and cross-selling to extract higher value from their bundles to facilitate monetization of FMC. Operators are set to focus less on quantity and more on quality now, the trend that we observe in many European markets. While we may not see FMC base hitting 100% of telcos' total customer base, FMC is here to stay. Telcos do not want to put all their "customer eggs" in the same basket and we will see both standalone (x-only) and FMC customers bases coexisting in telos' customer base mix.
- **A fall in FMC base sometimes just means a customers' migration to x-only base.** When FMC discounting ends some customers may only remain subscribed for x-only service from the same operator and purchase the other x-only service from another provider. So, it is important to look at customer churn rate and net adds across both FMC and x-only segments to analyze telcos' customer growth dynamic and trends.
- **The cost-of-living crisis will impact FMC.** As the cost-of-living crisis continues to rage, households will be reviewing their converged packages, and some will move away from "big bundles." Omdia has observed that many operators have started to offer a great deal of flexibility and to "soft-bundle" TV/OTT and other microservices on an optional basis, leaving a basic 5G-fiber bundle at the core. Importantly, cost-of-living pressure also partially contributes to a decline in the FMC base for some operators in 2022-23.

Omdia view (2)

- **Has convergence-driven M&A activity hit the pause button?** M&A activity continues despite soaring capital costs and a negative macroeconomic outlook. As organic growth opportunities are shrinking, telecoms operators will continue to engage in M&A activity to facilitate further expansion, capture cost synergies, and benefit from economy of scale. The increased significance of AI is expected to further fuel M&A activity in the telecom segment. Telcos will be looking to acquire AI and technology-driven operators to diversify their bundling portfolio and add capabilities essential to the monetization of content on their network. However, all potential M&A targets will go through a great deal of scrutiny to evaluate their long-term profitability and overall impact on telcos' businesses.
- **Develop, partner or acquire?** Telcos continue to diversify the offerings in their bundling portfolio to navigate constantly changing consumer preferences and gain competitive advantage. Some choose to partner and create powerful alliances to offer new products and services to enrich bundle propositions, others opt to acquire prospective businesses. Lastly, some telcos decide to build and develop their own services. As creating a successful new service requires deep technical skills and capital investment, partnerships, alliances, and acquisitions tend to be more popular. For example, as of 2Q23, 53% of all 543 converged operators offer third-party OTT services to their customers.

Omdia view (3) FMC benefits



Omdia view (4) Why has FMC growth flatlined in selected markets?

The end of heavy discounting

Operators usually introduce heavy discounting to attract more customers at the beginning of the FMC cycle. Once the discounting ends, some customer churn is inevitable. However, the customers sometimes just shift to an x-only plan with the same telco, so it is not a “game over” for the telco yet.

Cost-of-living impacts FMC

While the cost-of-living crisis is raging some customers may switch to cheap standalone deals.



High fiber penetration

Operators use FMC for upselling fiber. So, the opportunities for FMC are reduced in markets with a high fiber adoption rate (e.g., France and Spain).

Poor customer service

Due to cost-cutting some telcos are failing at providing digital-native, effective, and personalized customer support. So, they may end up losing both fixed and mobile business to their rivals, given that one single customer may sign up for multiple services offered by the converged telco.

“Discounting is the most important aspect of FMC for some customers. Once the discounting period ends, some customer churn is inevitable.”

Diana Gorelik
Senior Analyst, Europe Service Provider Markets



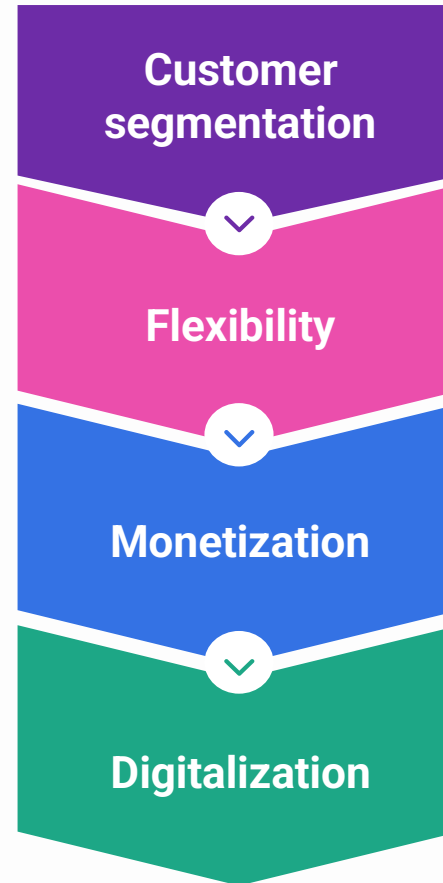
Key recommendations for service providers

Customer segmentation

- Facilitate customer segmentation and product differentiation to target various customer groups. For example, telcos can customize their products to different age demographics. While Gen Z and millennials might be more interested in a “big data 5G-1Gbps fiber-OTT-gaming” type of bundle, Gen X might be more attracted to a basic fixed-mobile bundle with an option of diverse TV content.

Flexibility

- Flexibility is a key to the long-term success. Telcos should allow their customers to pick and choose services, such as mobile data allowance, broadband bandwidths, and OTT/TV content based on their needs. Moreover, customers should be given an option to amend and upgrade their services during the contractual period, and switch between price tiers.



Monetization

- Think monetization and profitability first but do not forget about the cost-of-living and the impact of tariff hikes on households. Operators must learn how to navigate the economic crisis and introduce relevant pricing strategies to stimulate the uptake of bundles during the economic downturn. Bundles should be made affordable for a wider market.

Digitalization

- Increase the focus on digitalization of FMC. Telcos need to diversify their digital microservices bundle portfolio, with typical services like OTT, cloud, and music and gaming, as well as non-telecom vertical services (e.g., financial services and utilities).

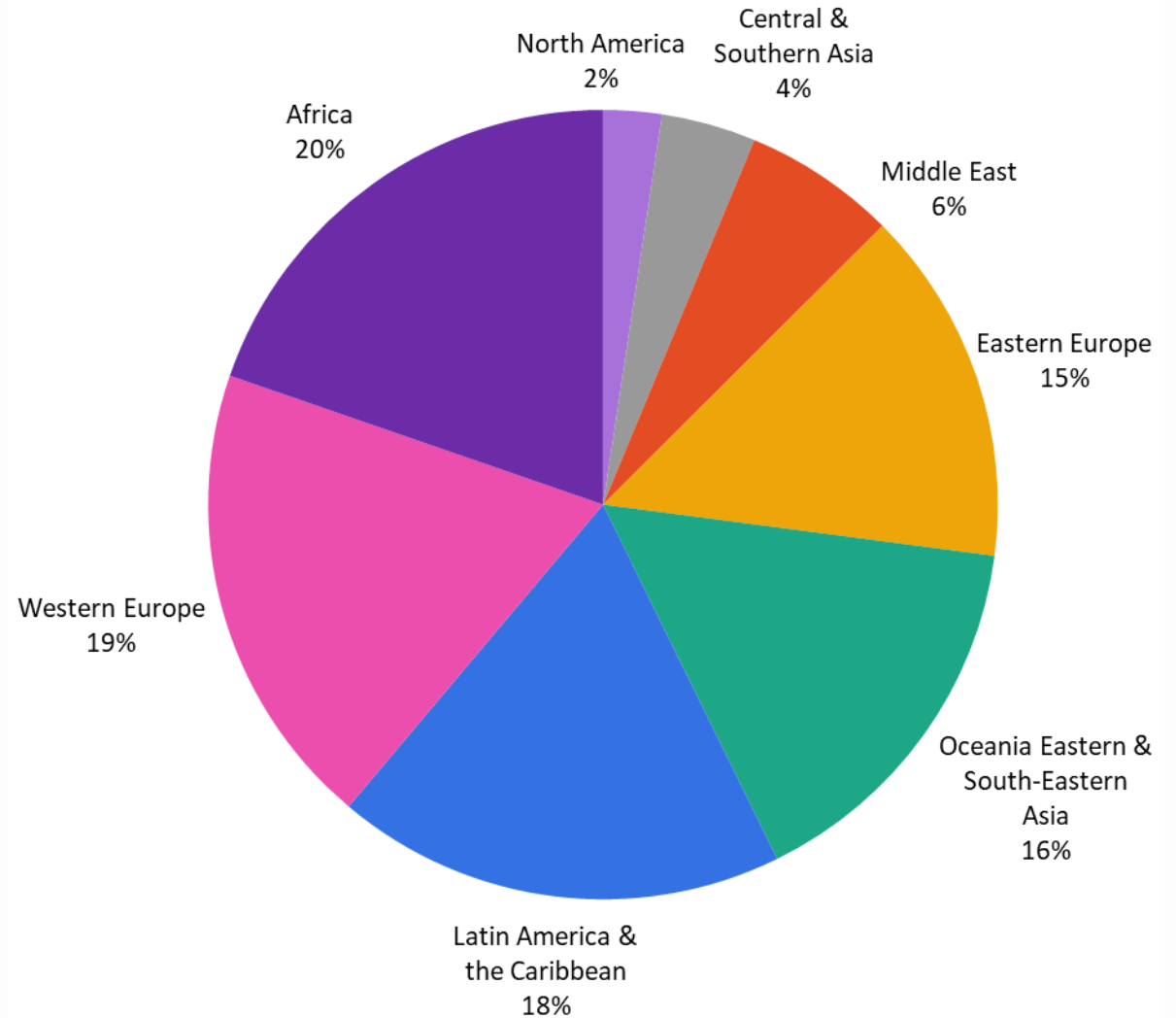


Corporate-level convergence

Corporate-level convergence continues despite the cost-of-living turmoil

- Omdia estimates that a total of 543 operators — 60% of all operators worldwide, +1% percentage points year-one-year (YoY) — had both fixed and mobile assets at the end of 1H23. Market consolidation is driven by “four-to-three” and infrastructure-driven mergers as well as the growing private equity (PE) TMT activity.
- While rising interest rates, volatile markets and general economic slowdown continue to depress global M&A activity, **TMT M&A still shows some signs of life**. However, the number and dollar value of deals fell in the last twelve months. Consolidation in the sector is driven by a scale advantage and better opportunities to expand technical capabilities and drive innovation.
- **M&A activity in Europe is still going strong**. Of 543 converged companies worldwide, 183 are in Europe, and of 231 telcos in Europe, 80% are fully converged. While funding opportunities have shrunk in 2022–23, the TMT segment in Europe is relatively well protected from rising inflation, as service providers are able to pass some inflationary costs to their high-end customers.

Converged at a corporate level, % of operators, 2023



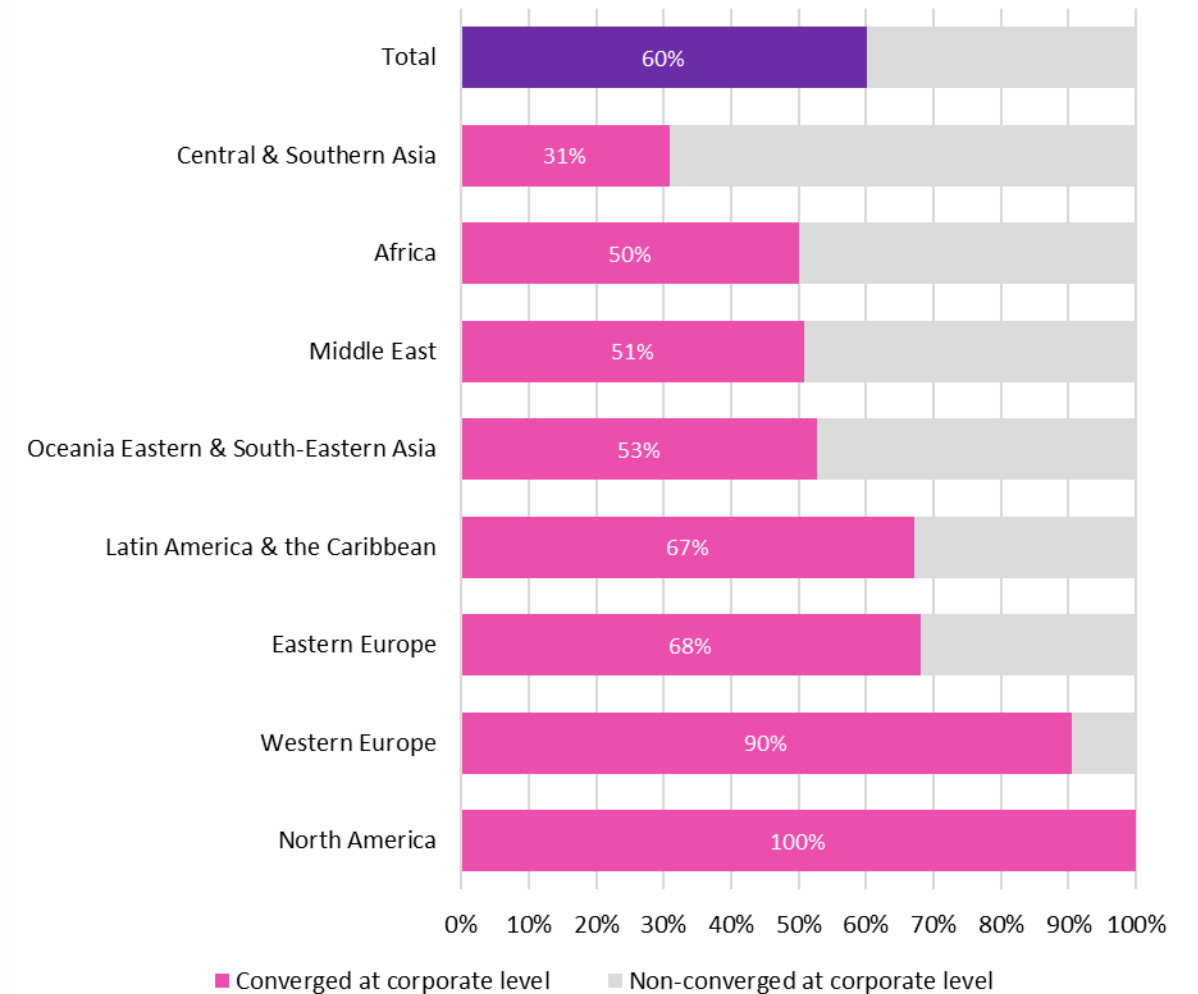
Source: Omdia

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Europe is still at the top of the convergence wave

- **One more big shift towards convergence in the UK driven by “four-to-three” move.** In June 2023, Vodafone Group and CK Hutchison Group, owner of Three UK, have agreed to combine their UK business operations. This merger will create the third largest multiservice operator if this is approved by the regulatory bodies.
- **In Europe, a major “four-to-three” consolidation announcement came from Spain.** In July 2022, Orange Spain and MásMóvil announced a merger deal, which is subject to approval from the EC, which earlier objected to the deal. A decision is due in September 2023. Also, in October 2022 Vodafone Group reached an agreement to acquire MásMóvil’s Portuguese ISP NOWO, a deal which will strengthen Vodafone’s position in Portugal.
- **M&As are driven by infrastructure transactions.** In June 2023, to strengthen its fiber network outreach in Netherlands, KPN completed a purchase of wholesale fiber assets from Primevest Capital Partners, the European investment management company.

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



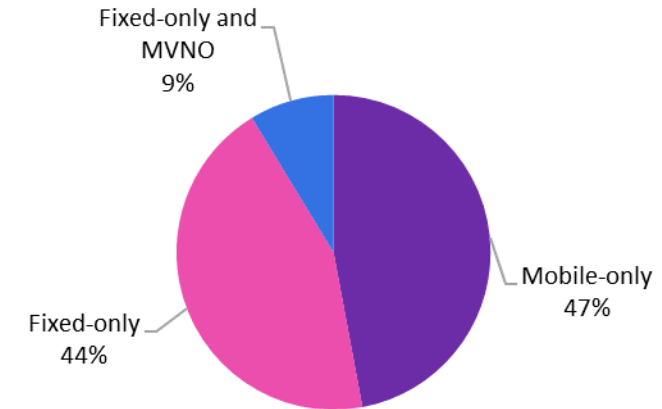
The economic crisis pushes some telcos to divest their telecom assets

- The macroeconomic uncertainty creates unique investment opportunities, but it also urges some operators to slow down their asset acquisition spree. While dealmaking activity has not stopped, some telcos take their time to transition their M&A strategy to build capabilities and increase value, which means telcos also consider divesting assets with little or no prospects of success and invest their freed funds in more units with better prospects or pay off their debts as capital costs rise:
 - In August 2023, e& (the UAE-based telecom group) agreed to acquire a controlling stake in PPF Group's telecom assets in Bulgaria, Hungary, Serbia, and Slovakia. While e& is looking for growth opportunities in Europe, the Czech investment group PPF decided to scale back its previously ambitious retail telecom expansion plans in the region.
 - In July 2023, Axiata Group (the Malaysian telecom group) also announced that it is going through a strategic review of its business in Asia. The telco is considering selling stakes in some of its wholesale telecom business to focus on monetization of its revenue-generating units and pay off some of its debts.
 - In April 2023, Telia agreed to sell its Danish unit to Denmark's Norlys, a utility service and internet provider, for about €836m. According to Telia, the telecom group wants to simplify its portfolio and focus on the markets where it can sustain or build a leading position.
 - In January 2023, Vodafone Group agreed to sell its Hungarian unit to 4iG, a regional telecoms group, and the Hungarian government. The telco confirmed that the proceeds from the sale would be used to pay down some of its debts.
 - In September 2022, the Qatar-based Ooredoo Group announced the sale of its Myanmar unit to The One Matrix Ventures, a Singaporean technology company, for about €518m, as foreign telcos continue to flee the market following the military coup in 2021.

Number of x-only operators is steadily going down

- According to Omdia's figures, 40% of telecom operators worldwide (360) are standalone (x-only) operators (-1% YoY) at end-1H23 as consolidation in the telecom industry continues despite turbulent times. X-only operators have **reduced opportunities for growth and innovation** compared to large multiservice operators. Moreover, x-only operators will not be able to deliver the same value proposition to their customers as their multiservice counterparts.
- X-only operators are pushed into mergers as they aim to create value and increase profitability in the post-merger integration process.
- As regulators are becoming more lenient to "four-to-three" mobile mergers and fiber market consolidation, the number of x-only operators will continue to decline in the outlook.
- For example, in July 2023, CRC, the Bulgarian telecom regulator, approved Vivacom's acquisition of seven fixed-line operators, further reducing the share of small ISPs on the fixed-line market and strengthening Vivacom's position as a converged operator.

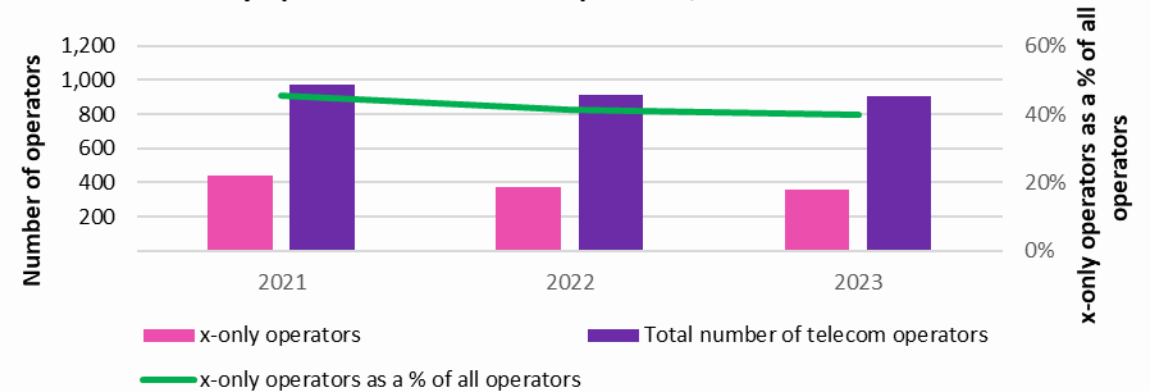
Number of x-only operators, World, 2023



Source: Omdia

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Number of x-only operators as a % of all operators, 2021-23



Source: Omdia

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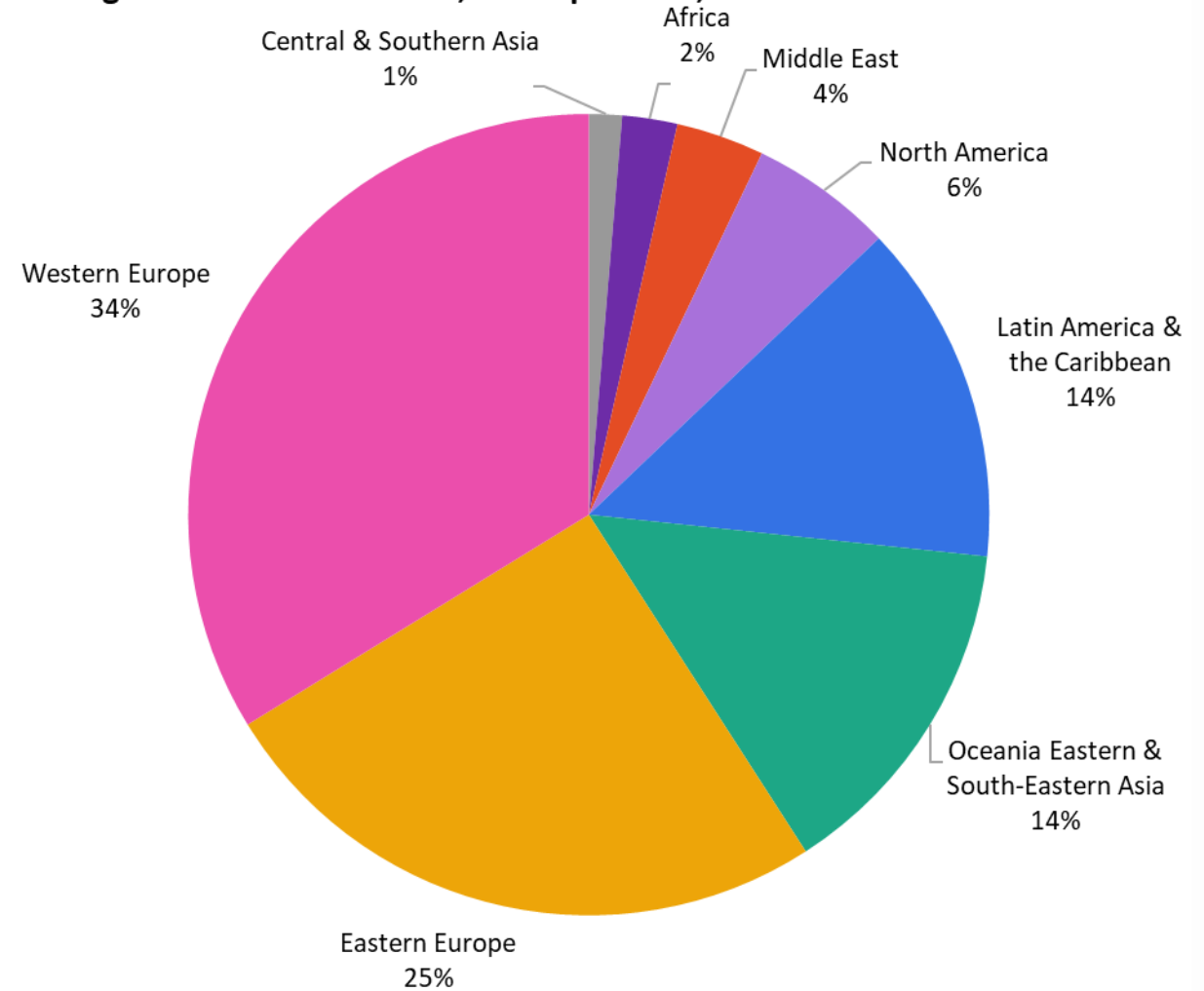


Commercial-bundling level convergence

Multiplay bundling is on a rise

- The overall penetration of FMC bundles is growing in most countries: commercial bundles are offered by 225 companies, 25% of all operators globally at end-2Q23 (+4 percentage points YoY). However, only 41% of all operators converged at corporate level offer FMC bundles (+5% percentage points YoY):
 - Europe has the largest share of commercial-bundling level convergence due to the concentration of converged operators and growing broadband coverage. Moreover, bundles in Europe are becoming more agile and include various multiservice propositions such as OTT, smart home, and gaming. This trend ultimately increases upselling and cross-selling opportunities and drives monetization.
 - Operators in Oceania, Eastern, and South-Eastern Asia are rapidly growing their bundling propositions. In some markets, such as China and South Korea, 5G is commonly bundled alongside broadband to facilitate household stickiness. In other Asian markets like for example Malaysia, Thailand, and Indonesia the discounted FMC packages serve as a tool to increase the adoption of fiber which is sold at a premium.

Converged at commercial level, % of operators, 2023



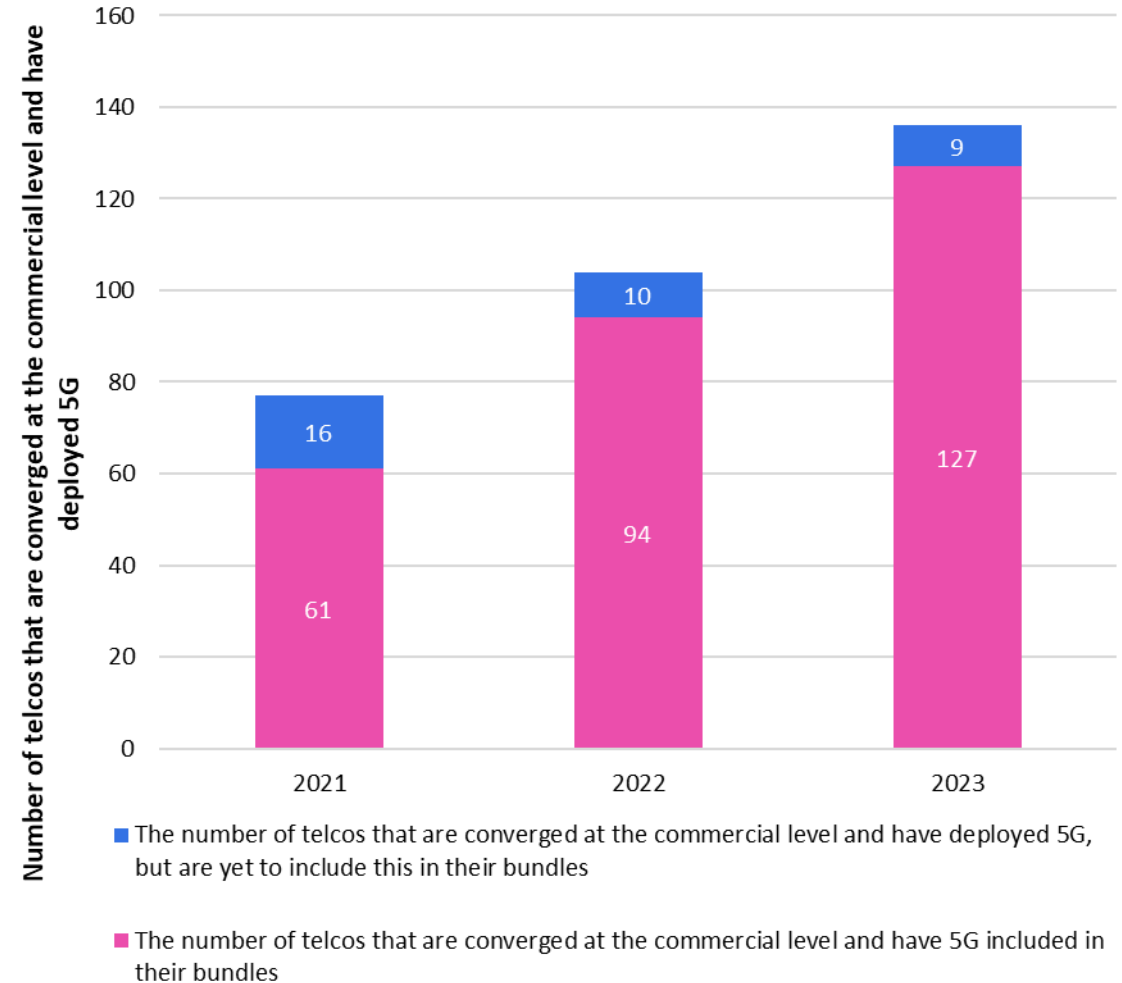
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5G adoption in multiplay bundling is going strong

- Omdia estimates that 93% of telcos that have deployed 5G and are converged at commercial level, have already included 5G in their FMC bundles.
- Bundling facilitates the 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.
- Product differentiation based on 5G mobile data allowance is at the forefront of telcos' propositions. Once the initial contractual period ends, telcos aim at switching/upgrading customers to high-end tariffs to raise monthly tariff fees, which, in turn, positively impacts their ARPU prospects and increases profit margins. To sum up, bundling 5G can help to lock in high-value customers into long-term contracts, which facilitates monetization prospects.

5G and commercial-level bundling, 2021-23



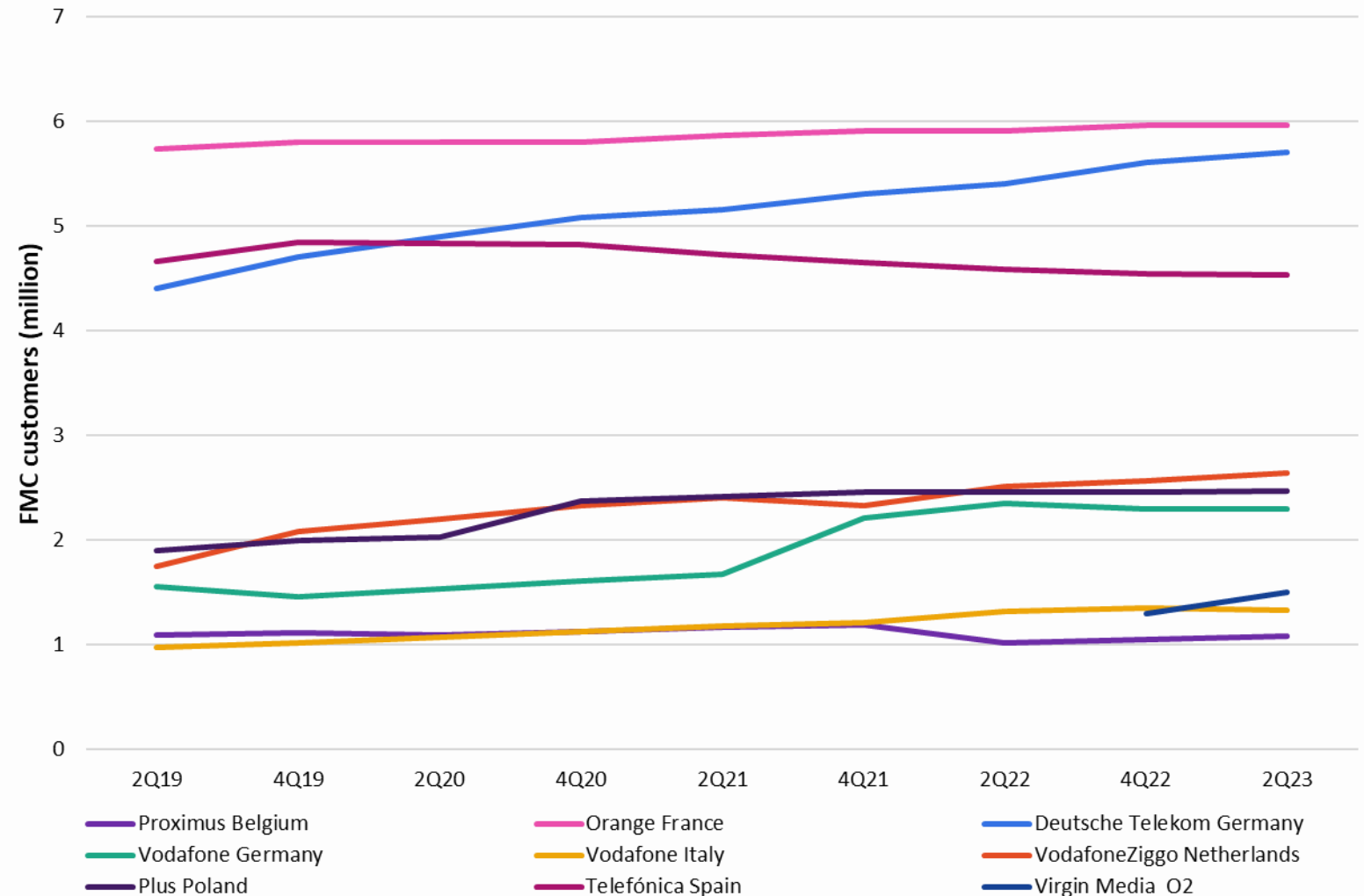
Source: Omdia

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FMC customer base growth: mixed growth outlook for telcos

- While the FMC subscriber base continues to grow for some operators, others have started to experience a decline. For example, the FMC customer base for all three major MNOs in Spain (Orange Spain, Vodafone Spain and Telefónica) declined 4% YoY to 9.6 million in 2Q23 due to particularly challenging market conditions in this hypercompetitive market.
- The FMC base in some countries with a high level of convergence has started to reach saturation point as telcos focus less on quantity and more on quality of their FMC subscribers, to avoid revenue erosion and facilitate monetization prospects.
- On the contrary, FMC penetration is increasing significantly in countries like the UK and Italy due to recent M&A trends as well as a relatively low fiber adoption rate which leaves room for FMC growth.

FMC customer base, selected companies, 2Q19-2Q23



Source: Omdia

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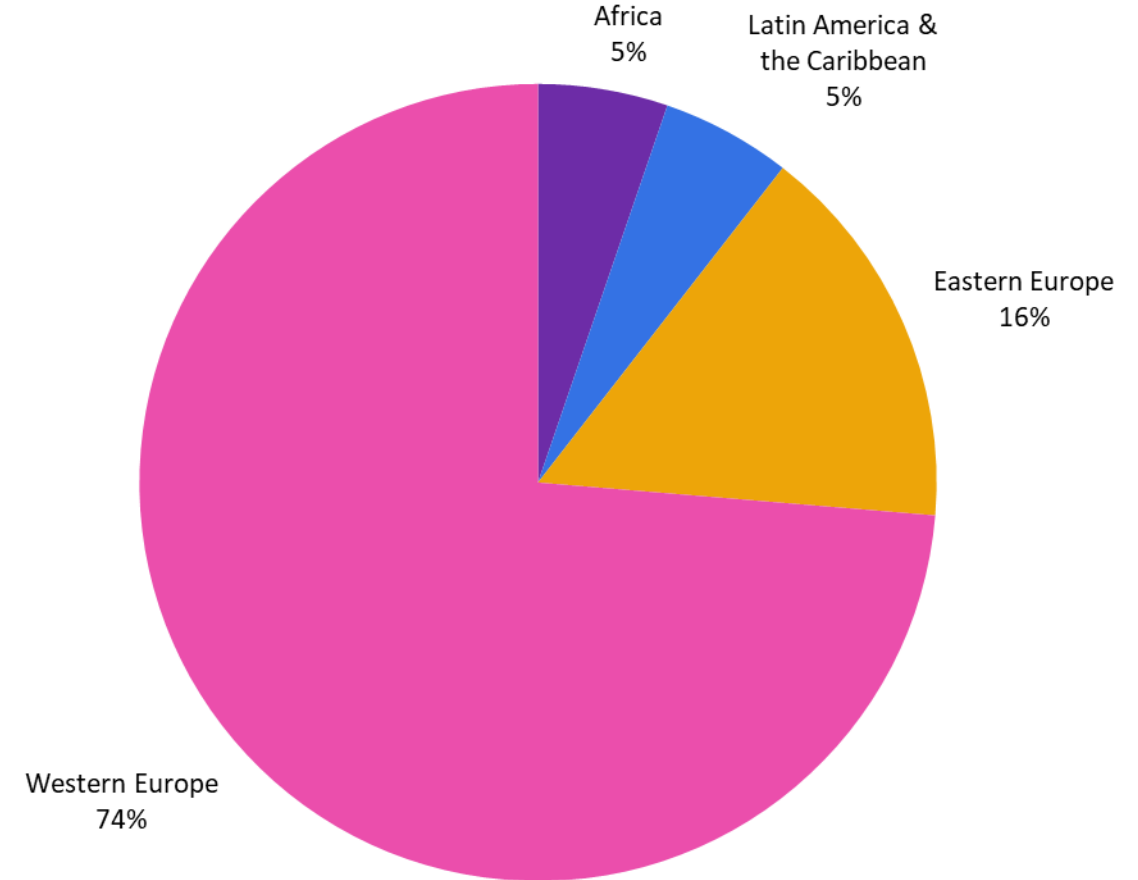


Technology-level convergence

In the world of fiber, the converged FMC devices are costly niche market

- 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 quality of service in areas where fiber and FWA deployment is not commercially viable.
- Given high fiber adoption, these hybrid devices are not mainstream products and often are being sold at a premium. However, tech FMC can be used as an alternative connectivity solution to support the EC's 2030 Digital Decade target on connectivity.
- For example, in the UK these tech FMC devices have been mostly marketed for SMEs in rural areas. Legacy infrastructure still dominates the market in the UK and the country remains firmly in the lower regions of the fiber penetration ranking with 11% fiber share in the total technology mix at end-2Q23.

Converged at technology level, % of operators, 2023



Source: Omdia

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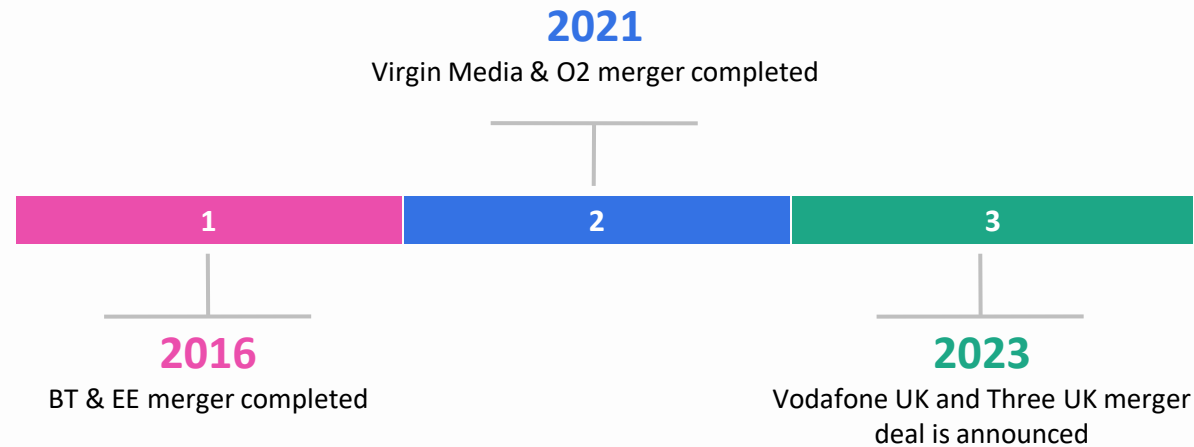
Service providers' best practices: FMC strategies and products

“FMC in the UK is centered around value creation. The telcos tend to stay away from heavy discounting.”

Diana Gorelik

Senior Analyst, Europe Service Provider Markets

The UK is heading to become a fully converged market

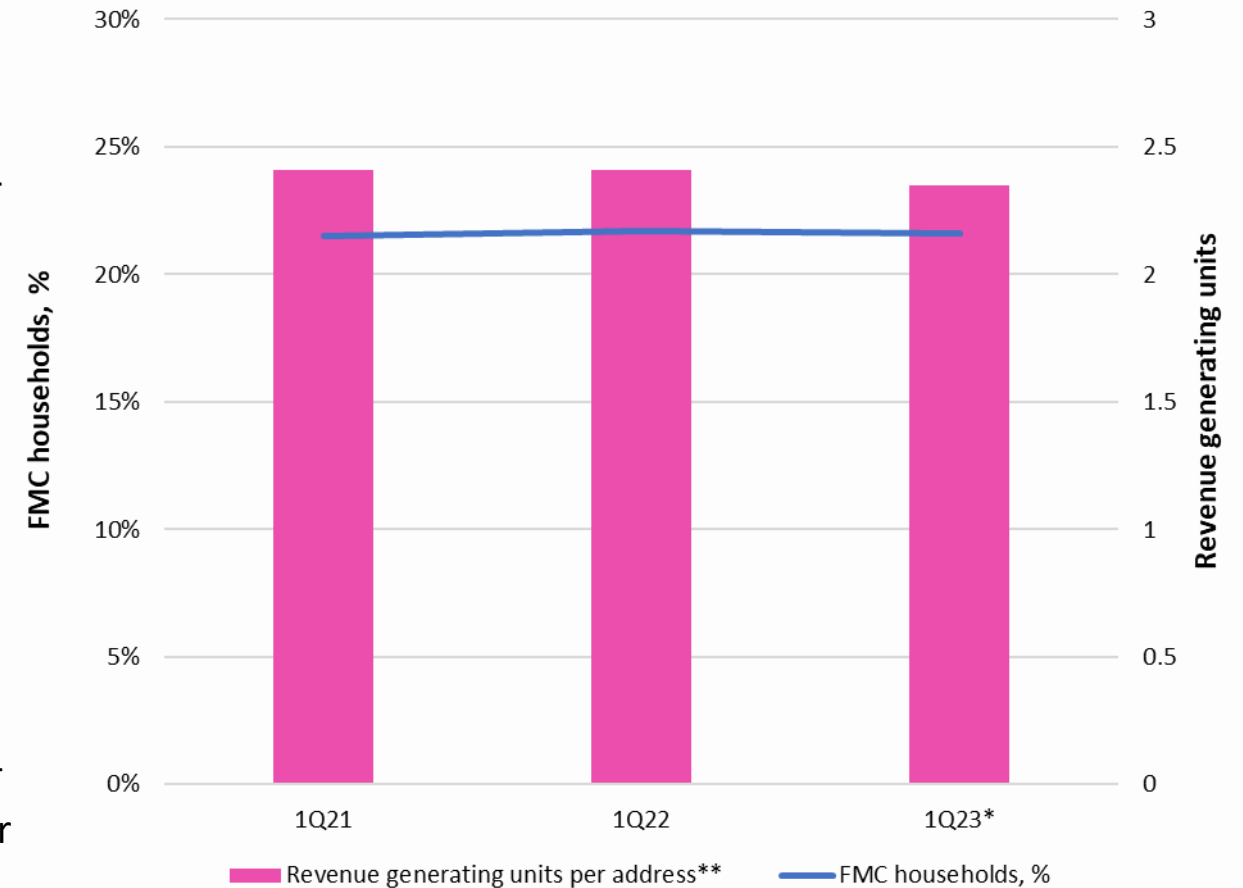


- FMC in the UK took off following the merger of BT and EE in 2016.
- In October 2021, newly merged Virgin Media O2 launched a converged bundle called Volt. In 2022, the telco launched a new converged 4G and fiber-bonded tech product, Voom Gig1, mainly targeting its business customers.
- In 2022, Sky UK launched Sky Business Broadband, which is run on the Sky Mobile MVNO (over O2's network) and Sky's broadband network. The product is also mainly targeting the telco's business customers (e.g., small and medium-sized enterprises).
- In June 2023, the official announcement has come that Vodafone UK and Three UK announced the merger deal. Should this merger go ahead, the UK will have three fully converged operators which will further heat this increasingly competitive market.

BT targets 50% FMC households by 2030

- Convergence in the UK has been undeveloped due to a lack of competition in the fixed wholesale segment. Following its merger with EE in 2016, BT started to emphasize the importance of convergence in its retail strategy.
- 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. The telco includes Home Tech Experts support for free in its FMC proposition.
- In its earnings release from 1Q23, the telco outlined the growth of convergence at the top of its retail strategy. The telco aims its FMC household base to reach 30%-50% by FY28-FY30. BT targets the premium/B2C segment, and its FMC deals do not offer significant monetary discounts, hence its converged customer base growth has been flat in the last two years.

BT convergence KPIs, 1Q21-1Q23



Notes: * From 4Q22 reflects improved customer address data, resulting in a c.0.02ppts decrease in the total
 **As per BT definitions: "Number of chargeable products, including BT Sport only customers, per separate address measured across the BT, EE and Plusnet brands, aggregated to give a total for the Consumer customer-facing units."

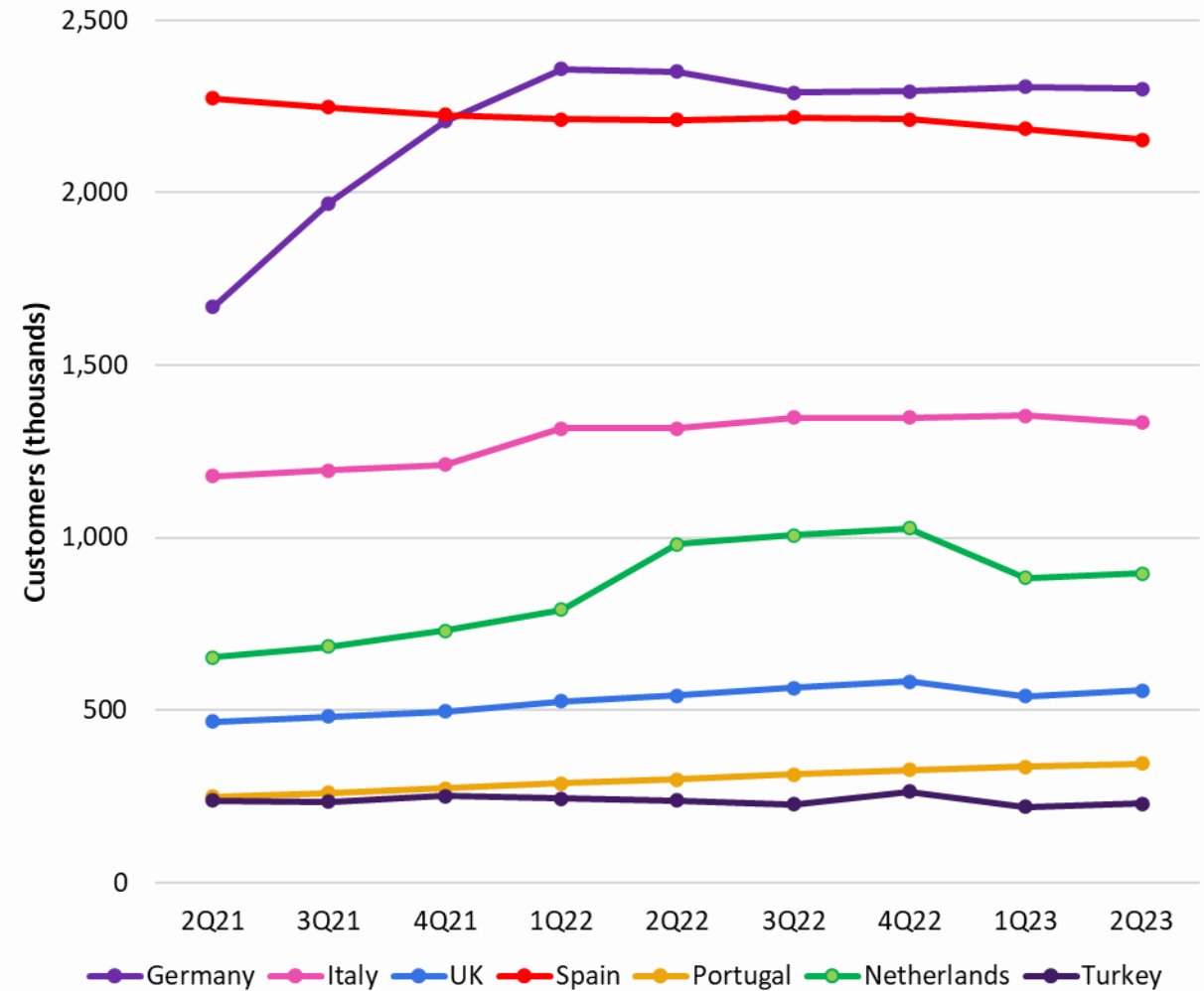
Source: Omdia, BT

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Vodafone Group's convergence is a mixed picture

- Vodafone has long described itself as a “leading converged connectivity provider” with its 7.8 million FMC customer base at end-2Q23 (–2 percentage points YoY).
- A breakdown for some of its operations shows Germany has the largest FMC base followed by Spain and Italy.
- Importantly, Vodafone has experienced rather sluggish growth of its convergence KPIs. The telco tries to stay away from heavy discounting in its key markets to avoid decline in ARPU and revenue erosion.
- FMC subscription base declined by 2% YoY and 3% YoY in Germany and Spain respectively at end-2Q23. In Germany, the telco attributed a decline to high churn in its broadband subscriber base as well as fewer cross-selling opportunities. In Spain, convergence growth opportunities have been impacted by a decline in the broadband and TV base attributed to the upcoming shutdown of DSL and fierce competition.

Vodafone Group, converged customers, 2Q21-2Q23



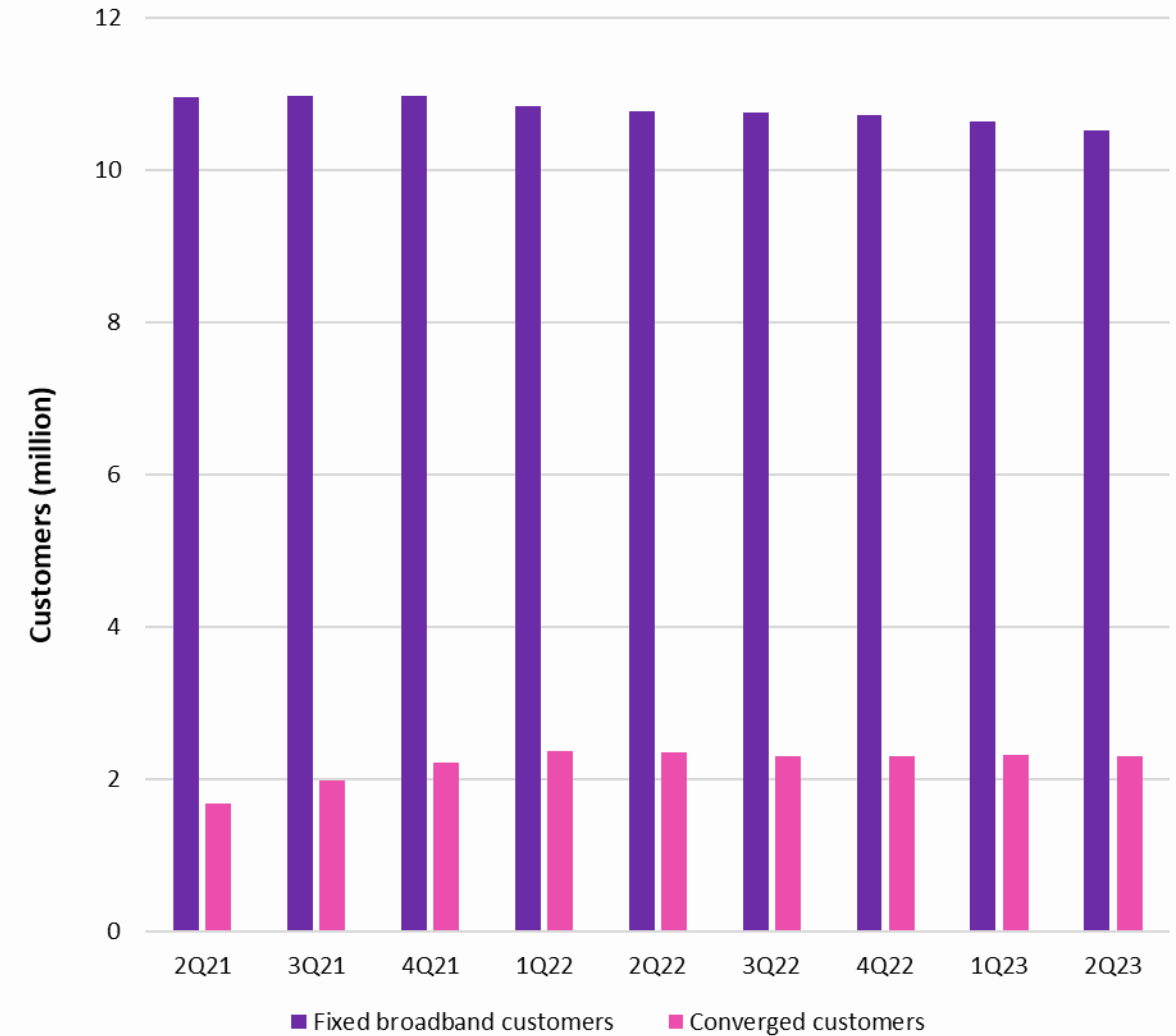
Source: Omdia, Vodafone Group

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Vodafone Germany FMC slowdown: a temporarily glitch or long-term decline?

- Vodafone Germany's FMC subscriber base declined by 2.1% YoY at end-2Q23. Importantly, Vodafone's mobile and fixed broadband bases also fell by 1.8% and 2.4% for the same period, respectively, which indicates a downturn in all aspects of the telco's business in Germany not just an underperformance of its convergent segment.
- Negative results in Vodafone's business are mainly explained by re-pricing activities (i.e., price increases for new customers and selected existing ones), so the telco expects more churn in its short-term outlook.
- In 2023, the telco announced a new strategy consisting of accelerated cost-cutting and targeted customer growth. Germany is a key market in Vodafone's portfolio so it is likely that the telco will endeavor to improve its business performance in all segments of its German unit including convergence.
- FMC is linked to the success of the Vodafone's strategic initiatives. FMC decline is more likely to be a temporarily glitch. However, it is very likely FMC growth will flatline in the long-term outlook.

Vodafone Germany customer base, 2Q21-2Q23

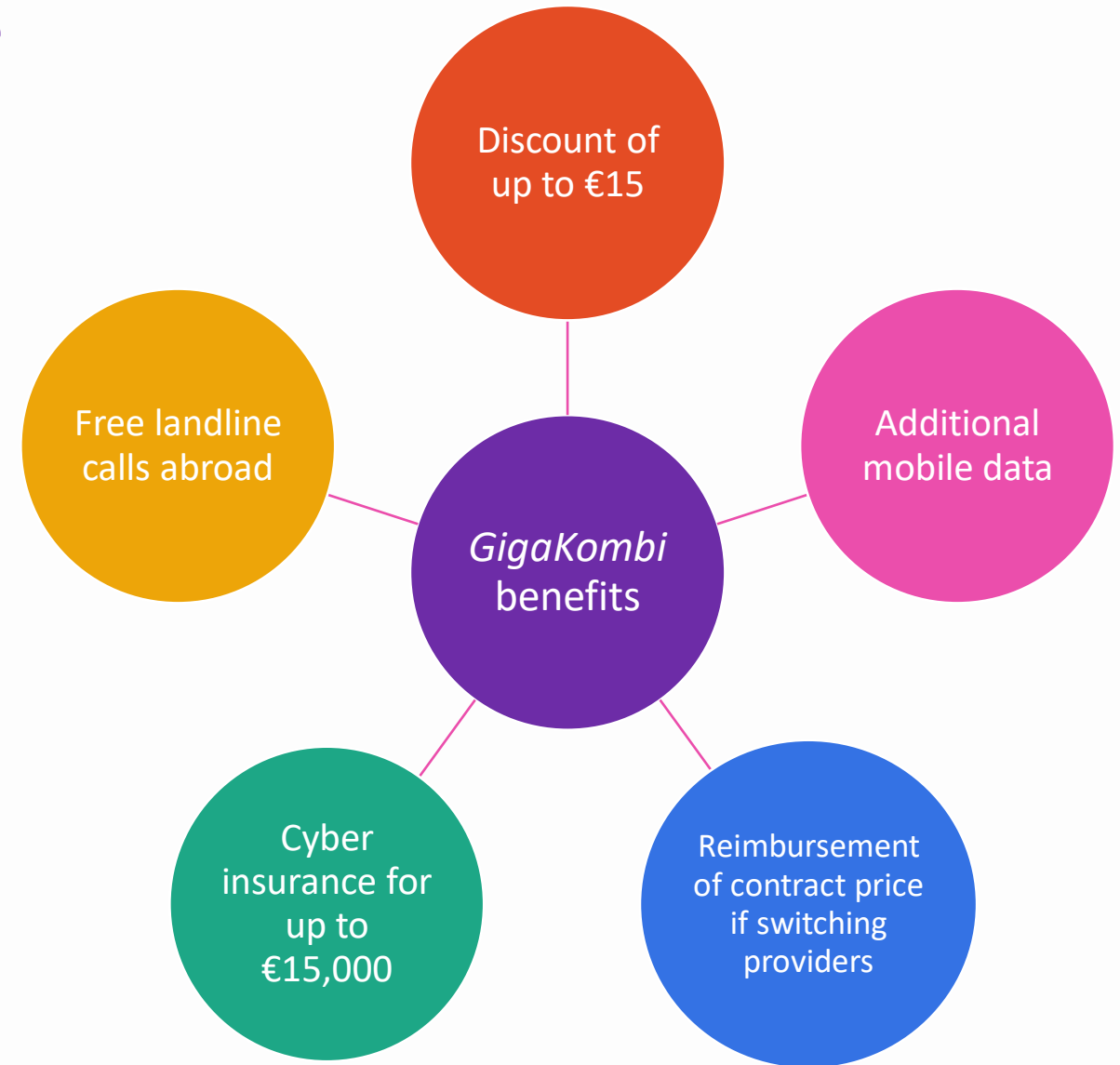


Source: Omdia, Vodafone Group

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Vodafone Germany: *GigaKombi* bundle

- The precondition of Vodafone's *GigaKombi* FMC proposition is a mobile and fixed contract: TV has been deprioritized, and its inclusion in the package is optional.
- The telco also encourages switching providers by reimbursing up to six months of the mobile contract price if a customer switched the provider while still being bound by the contract period with its previous provider.
- Product segmentation targeting various demographic groups is another feature of Vodafone's FMC bundle. Vodafone has several extra benefits specifically designed for people under 28.
- The telco aims to lock the whole household into the bundle by offering various supplementary mobile contract options on top of the principal *GigaKombi* contract. This is particularly important in the German market because people tend to get cheap mobile contracts from MVNO's or digital sub-brands for their dependents.



Source: Omdia, Vodafone Group

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“FMC in Spain has flatlined as fiber penetration is reaching its saturation point.”

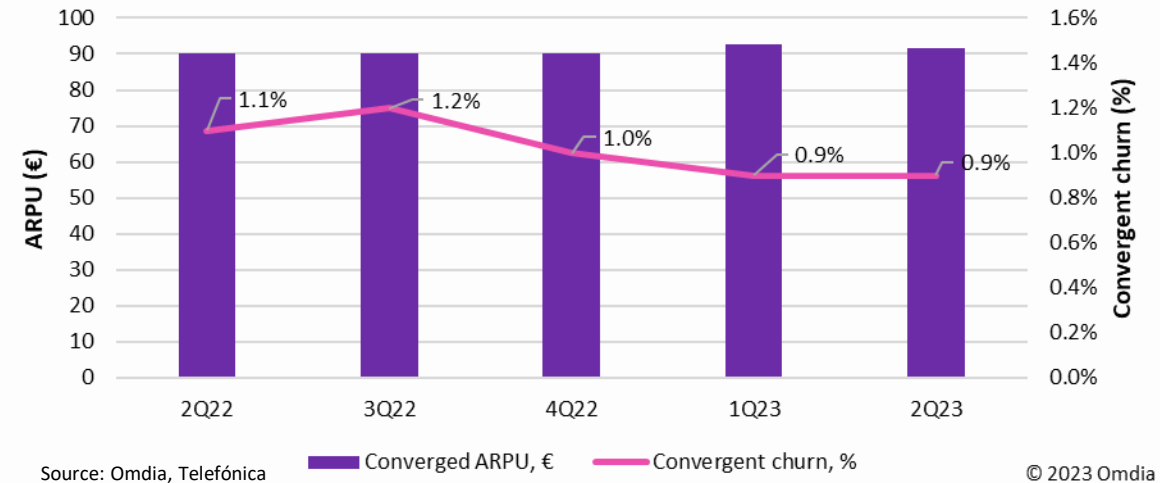
Diana Gorelik

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Telefónica Spain: a shift in FMC strategy

- Telefónica Spain is an early FMC adopter with the telco emerging as a main FMC player on the market when it introduced a new low-cost FMC bundle under its Movistar *Fusión* brand in 2012.
- As the convergence intensified, severe competition has led to revenue erosion. Eventually, growth of the telco's converged subscriber base has flatlined. The success of convergence is linked to fiber penetration but given fiber's share in the total fixed broadband technology mix in Spain reached nearly 85% at end-2Q23, there is very little room for further growth of fiber and FMC.
- In 2022, the telco updated its convergent strategy under the *miMovistar* brand. The prominent feature of its converged product is its flexibility, as the telco allows its customers to build a customized plan by choosing a relevant service.
- The telco allows its customers to extend the discounts to the second residential properties/holiday residencies.
- The telco does not tie its customers into long-term contracts and allows to modify the subscription choices at any time online.

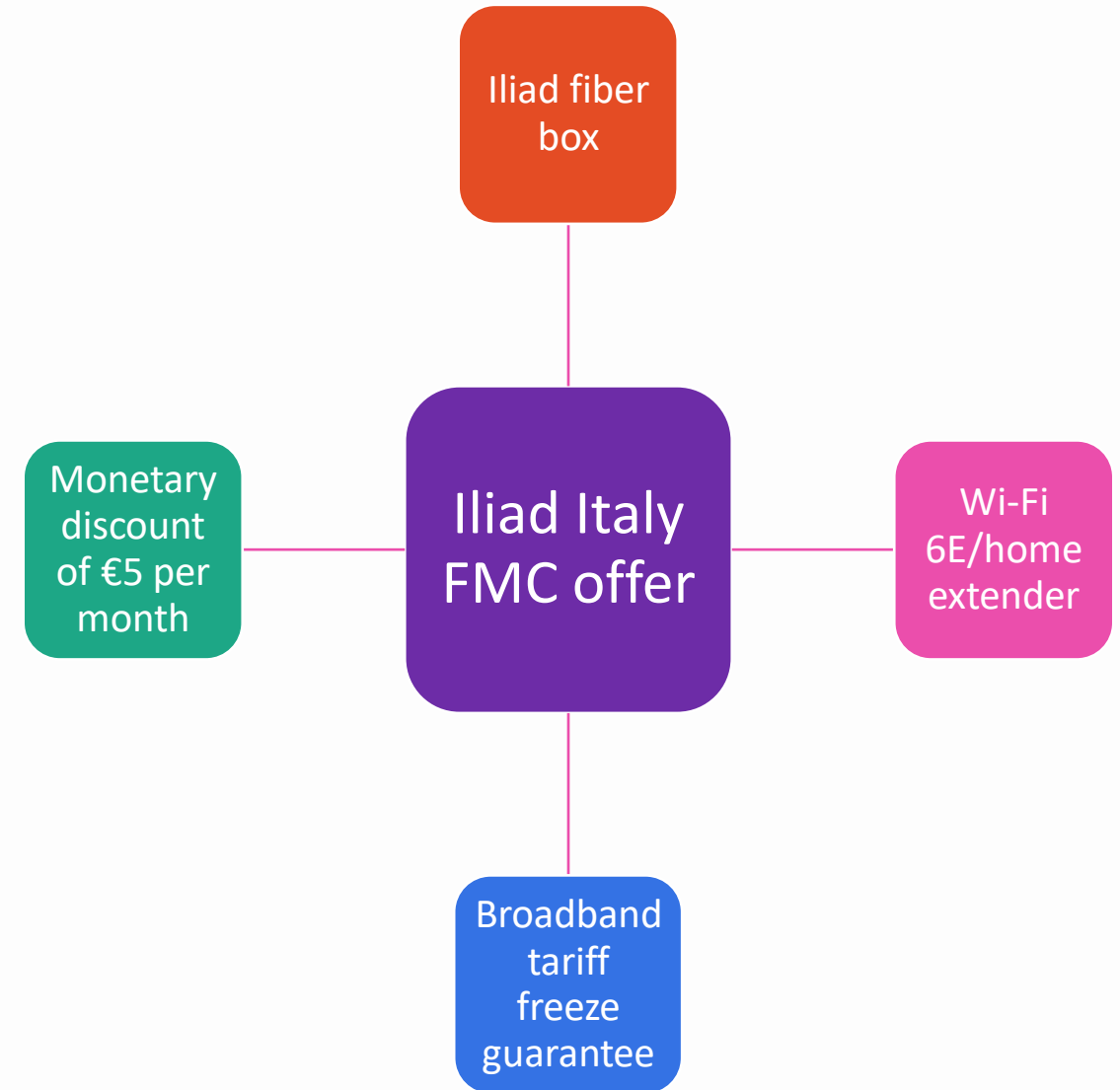
Telefónica Spain, FMC KPIs



- The telco aims to upsell big data 5G, 1Gbps fiber as well as its newly launched Movistar Plus+ OTT solution in its FMC bundle. Moreover, the telco offers its customers the Movistar Cloud platform, a cloud storage service.
- So, the telco shifted its focus from gaining market share with low-price offerings to adopting an innovation strategy and driving opportunities for cross-selling and upselling.

Iliad Italy: FMC tariff freeze is on offer

- Iliad entered the Italian fixed market in January 2022 using the wholesale networks of Open Fiber and FiberCop. Shortly following the launch of its fiber services, the telco started to offer heavily discounted FMC bundles.
- For Iliad mobile customers the fiber service costs €19.99 a month forever, following a €39.99 installation charge, while non-mobile customers will be charged €24.99 per month. The telco's promise to guarantee tariff freeze for the duration of the contract will act as an effective anti-churn mechanism but this also means the telco needs to review and adjust pricing for its new customers to avoid revenue erosion.
- Italy has a relatively low fiber adoption rate (17% at end-2Q23) compared to the neighboring Spain and France. So, there is a room for subscriber base increase in Italy. The telco is betting on cheap FMC offerings to facilitate the growth of its fiber base.
- Iliad offers its innovative Iliad fiber box, which uses Wi-Fi 6E extender supported by fiber for seamless connectivity and includes some entertainment features like TV.



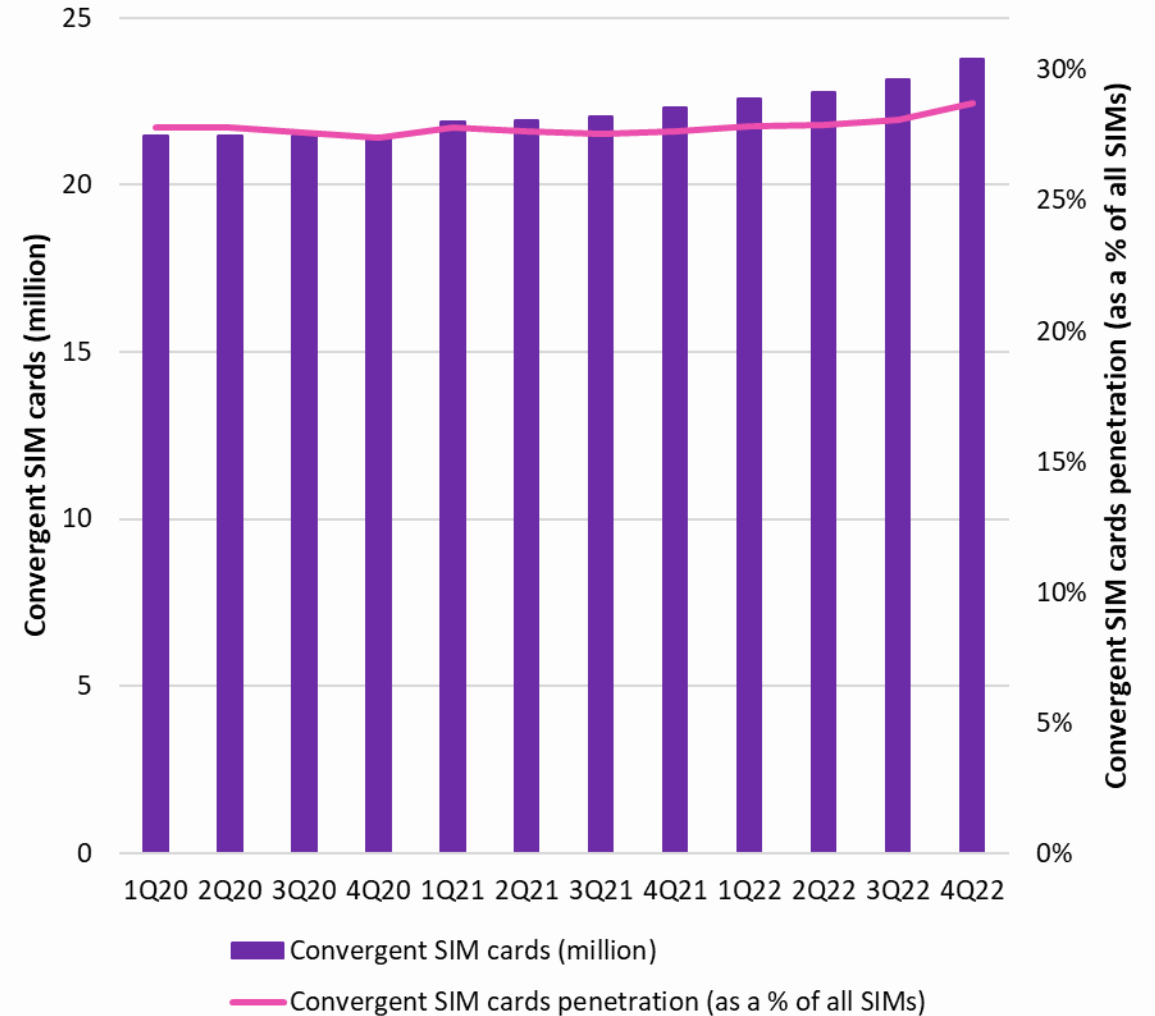
Source: Omdia, Iliad

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Has convergence peaked in France?

- Arcep (the French telecom regulator) reported that the number of converged SIM cards in France grew 6% YoY at end-2022 as operators continue to 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 remained stable in the last three years with a small growth recorded from 1Q22.
- There are signs that a rapid growth of 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. However, the country-level data shows that the momentum for FMC adoption remains strong.

Converged SIM cards in France, 2020-22

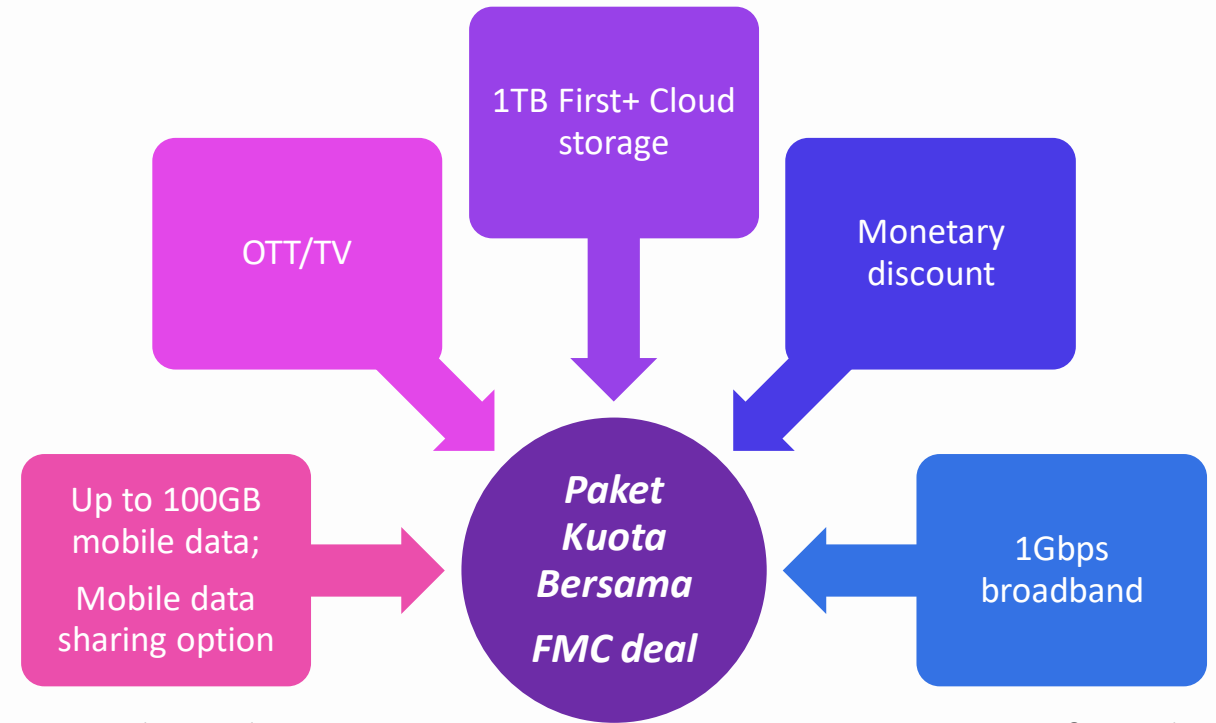


Source: Omdia, Arcep

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XL-Link Net merger triggered the convergence wave in Indonesia

- Telcos in Indonesia have been going through a round of infrastructure-driven M&As to increase their subscriber base and expand their service offering including a range of converged products.
- XL Axiata (a Malaysia-based Axiata Group company) finalized the acquisition of ISP Link Net Tbk in June 2022. Link Net retains its position as the second-largest broadband service provider in the country with a 5% market share at end-2Q23 and XL Axiata's and Link Net combined market share reaches nearly 8%. XL Axiata and Link Net continue to operate as independent brands; however, they have collaborated to provide joint products, including FMC deals to their customers.
- In October 2022, XL Axiata and Link Net launched a range of converged products on First Media (the Link Net's brand) website.
- Fixed broadband penetration in Indonesia is only about 20%, compared to 50% in neighboring Thailand. So, FMC is used to facilitate broadband penetration.



Source: Omdia, First Media

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- The primary feature of XL Axiata's FMC packages is data sharing between family members making it beneficial to buy a large mobile data pack and then share it between family members.

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 – 2023 (August 2023)

Fixed-mobile Convergence Benefits Demystified: France's FMC Journey (July 2023)

Service Provider Fixed-Mobile Convergence Tracker – 2022

Fixed-Mobile Convergence Global Overview: FMC is on the rise despite the economic downturn – 2022 (November 2022)

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Appendix

Omdia Consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help you. For more information about Omdia's consulting capabilities, please contact us directly at consulting@omdia.com.

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