

The Pierz Group

asks the right questions!



Western Europe: A Detailed Strategic Overview & Forecast

This encyclopedic report is the most detailed, most complete and most accurate forecast ever prepared for this dynamic region. It provides both a strategic assessment of key market factors and changes as well as detailed market-level statistics for twenty-two individual markets. Many markets in Western Europe are mature; however, there is still room for growth in all but a few markets. This report details how that growth can be attained, and in which markets. This report provides a detailed strategic look at key factors impacting the market and provides a market forecast that includes fixed and wireless volumes and revenues through 2011.

This Report Features:

- **191 Charts** and Tables (See Table of Charts & Figures)
- **247 Pages** that provide an understanding of the key factors driving changes in the market and show growth trends and changes through 2011
- Highly detailed market history and 2006-2011 forecast (volumes and revenues) for the region, with country level detail for 22 individual markets
- Detailed strategic assessment of the factors driving change in this market
- Competitive updates for EU member nations
- Pricing information
- Specific, actionable recommendations for service providers of all types

Who Needs This Report?

- All directory assistance/enquiry providers in the European markets, and those wishing to enter these markets.
- Technology suppliers to the industry
- Venture capital firms and investors in the information services arena
- DA/DQ providers in similar markets

Understand the market, understand the players, and leverage trends that will change how you do business.

The Pierz Group asks the right questions, you get the answers.

Price: \$3,950; EIDQ members receive a 15% discount

Purchase This Report Today:

Call or Email us: 248-922-1501, info@pierzgroup.com

Key Findings:

Western European directory assistance/enquiry markets, like many others, are being impacted by a variety of factors that are changing what consumers want and expect as well as driving changes in product offerings and growth patterns in the market. A myriad of specific elements make up each of these four key factors, and often a single element falls under more than one strategic factor. Identity management, technological innovation, competition, regulatory changes are changing information services markets at an increasing rate of speed. These changes have shifted growth patterns in the market.

- Most Western European directory assistance/enquiry (DA/DQ) markets are mature, total DA/DQ volumes are projected to increase by a modest 2.4 percent between 2006 and 2011.
- DA/DQ revenue growth will out-pace call volume growth. Total DA/DQ revenues are projected to grow by 17 percent during the five year, 2006-2011, planning cycle.
- This revenue growth is not uniformly distributed. Nine markets in Western Europe will see a contraction in revenues between 2006 and 2011.
- The forecast introduction of privacy-protected databases in many Western European markets over the next five years will drive growth in both total call volumes and in revenues. This single factor will be responsible for the call volumes growth in Western Europe. If, for any reason, the introduction of the Listed-for-Messages Only offering does not gain critical mass within the next five years, call volumes will continue their current downward trend.
- Call volume growth will be concentrated in those markets which are still experiencing the strongest growth in their overall economies, including Greece, Malta, Portugal and Cyprus.
- New regulatory decisions in the Dutch and Swiss markets should provide for new growth in call volumes in these markets.
- One of the smallest, more difficult to serve markets in Western Europe has gained two new competitors in the past 12 months.
- Seven Western European nations now have mobile penetration (mobile subscribers/ total population) rate of over 100 percent. Mobile subscribers are the fast growing segment of the DA/DQ market and the least likely group to be heavy DA/DQ users.

Western Europe: A Detailed Strategic Overview & Forecast

The Pierz Group

For more information on this and other topics pertaining to the greater directory assistance/enquiry market please contact The Pierz Group. The Pierz Group provides consulting services and high value reports on the key issues facing the greater information services market. We focus on providing detailed, actionable research and analysis as well as strategic consulting services and conferences. Regular reports cover the issues and trends most likely to influence the current operations as well as future planning of providers of Directory Assistance/Enquiry services and the vendor community worldwide.

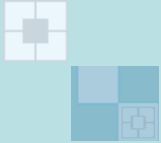
The Pierz Group is unique within the industry:

- Information services is ALL we do, we are *the* expert source
- All of our analysts have many years of industry experience
- We are completely independent
 - We do not participate on customers' boards
 - We do not give out awards
- We have defined strategic partnerships with firms such as Performance House and Converged Media Ltd.

Please contact us:

Phone: +1 248-922-1501

E-mail: info@pierzgroup.com or www.pierzgroup.com



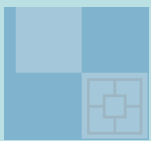
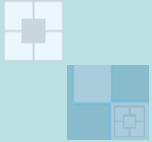
Contact Us Today!
info@pierzgroup.com
248-922-1501
www.pierzgroup.com

Western Europe: A Detailed Strategic Overview & Forecast



Table of Contents

Key Findings	18
Strategic Market Issues	20
Identity Management	22
Contact Points	24
Individual-Centric Databases	25
Consumer Privacy	29
The Shrinking Database	30
Self-Provisioned Information	31
Technological Innovation	33
Growing Dependence on Mobile Phones, Entrance of VoIP	34
Location-Based Services	36
Voice Over Internet Protocol (VoIP)	39
Internet Access and Broadband Penetration	40
Automation	40
Competition	42
Advertiser-Sponsored "Free" DA/DQ Services	42
Deregulation	45
Internet	46
SMS	46
Regulatory Changes	47
Consumer Privacy	47
Opt-In Databases	49
Pricing Issues	50
The Forecast by Market	53
A Changing Mix	53
Andorra	55
Andorra at a Glance	55
Telephone Subscribers	56
DA/DQ Call Volumes	57
DA/DQ Revenues	59
Austria	62
Austria at a Glance	62
Telephone Subscribers	63
DA/DQ Call Volumes	64
DA/DQ Revenues	66
Austrian Directory Assistance/Enquiry Access Numbers	69
Belgium	70
Belgian Market at a Glance	70
Telephone Subscribers	71
DA/DQ Call Volumes	73
DA/DQ Revenues	75
Belgian Directory Assistance/Enquiry Access Numbers	77
Cyprus	78
Cypriot Market at a Glance	78
Telephone Subscribers	79
DA/DQ Call Volumes	80
DA/DQ Revenues	82

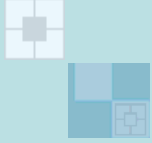




Western Europe: A Detailed Strategic Overview & Forecast

Table of Contents

Denmark	85
Danish Market at a Glance	85
Telephone Subscribers	86
DA/DQ Call Volumes	87
DA/DQ Revenues	89
Danish Directory Assistance/Enquiry Access Numbers	92
Finland	93
Finnish Market at a Glance	93
Telephone Subscribers	94
DA/DQ Call Volumes	95
DA/DQ Revenues	97
Finnish Directory Assistance/Enquiry Access Numbers	99
France	100
French Market at a Glance	100
Telephone Subscribers	101
DA/DQ Call Volumes	103
DA/DQ Revenues	105
French Directory Assistance/Enquiry Access Numbers	106
Germany	108
German Market at a Glance	108
Telephone Subscribers	109
DA/DQ Call Volumes	111
DA/DQ Revenues	113
German Directory Assistance/Enquiry Access Numbers	115
Greece	117
Greek Market at a Glance	117
Telephone Subscribers	118
DA/DQ Call Volumes	119
DA/DQ Revenues	121
Greek Directory Assistance/Enquiry Access Numbers	123
Iceland	124
Iceland Market at a Glance	124
Telephone Subscribers	125
DA/DQ Call Volumes	127
DA/DQ Revenues	129
Ireland	132
Irish Market at a Glance	132
Telephone Subscribers	133
DA/DQ Call Volumes	135
DA/DQ Revenues	137
Irish Directory Assistance/Enquiry Access Numbers	139
Italy	140
Italian Market at a Glance	140
Telephone Subscribers	141
DA/DQ Call Volumes	142
DA/DQ Revenues	144
Italian Directory Assistance/Enquiry Access Numbers	146

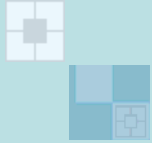




Western Europe: A Detailed Strategic Overview & Forecast

Table of Contents

Lichtenstein	147
Lichtenstein Market at a Glance	147
Telephone Subscribers	148
DA/DQ Call Volumes	149
DA/DQ Revenues	151
Luxemburg	154
Luxembourg Market at a Glance	154
Telephone Subscribers	155
DA/DQ Call Volumes	156
DA/DQ Revenues	158
Luxembourg Directory Assistance/Enquiry Access Numbers	160
Malta	161
Maltese Market at a Glance	161
Telephone Subscribers	161
DA/DQ Call Volumes	163
DA/DQ Revenues	165
Maltese Directory Assistance/Enquiry Access Numbers	166
The Netherlands	167
Dutch Market at a Glance	167
Telephone Subscribers	168
DA/DQ Call Volumes	170
DA/DQ Revenues	172
Dutch Directory Assistance/Enquiry Access Numbers	174
Norway	175
Norwegian Market at a Glance	175
Telephone Subscribers	176
DA/DQ Call Volumes	177
DA/DQ Revenues	179
Norwegian Directory Assistance/Enquiry Access Numbers	181
Portugal	182
Portuguese Market at a Glance	182
Telephone Subscribers	183
DA/DQ Call Volumes	184
DA/DQ Revenues	186
Portuguese Directory Assistance/Enquiry Access Numbers	188
Spain	189
Spanish Market at a Glance	189
Telephone Subscribers	190
DA/DQ Call Volumes	192
DA/DQ Revenues	194
Spanish Directory Assistance/Enquiry Access Numbers	196
Sweden	197
Swedish Market at a Glance	197
Telephone Subscribers	198
DA/DQ Call Volumes	200
DA/DQ Revenues	202
Swedish Directory Assistance/Enquiry Access Numbers	204

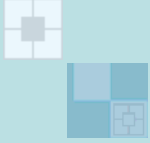


Western Europe: A Detailed Strategic Overview & Forecast



Table of Contents

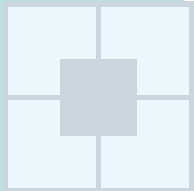
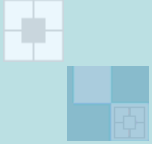
Switzerland	205
Swiss Market at a Glance	205
Telephone Subscribers	206
DA/DQ Call Volumes	208
DA/DQ Revenues	210
Swiss Directory Assistance/Enquiry Access Numbers	212
United Kingdom	213
British Market at a Glance	213
Telephone Subscribers	215
DA/DQ Call Volumes	216
DA/DQ Revenues	218
British Directory Assistance/Enquiry Access Numbers	220
Additional Western European Markets (Faroe Islands, Gibraltar, Guernsey, Jersey, Monaco and San Marino,)	222
Summary for Western Europe	223
Telephone Subscribers	223
DA/DQ Call Volumes	224
Revenues	229
Pricing	232
Summary & Recommendations	234
Summary	234
Recommendations	236
Your Customers Don't Want a Phone Number	236
Build your brand	239
Add Mobile Numbers to the Database	240
Manage Costs - Where it Makes Sense	242
Glossary	244
Related Research	246



Western Europe: A Detailed Strategic Overview & Forecast

Table of Figures

Figure 1: Four Key Drivers Of Change in European DA/DQ Markets	21
Figure 2: Evolution of an Individual-Centric Data Model	25
Figure 3: Range of Contact Points for an Individual 2006	28
Figure 4: Listed Telephone Numbers in the DA/DQ Database: The U.K. and Denmark	31
Figure 5: European Telephone Subscribers	35
Figure 6: Usage of Enhanced Features by Orange Subscribers	38
Figure 7: Features Canadians Want from a DA/DQ Agent	39
Figure 8: Free Services Will Expand the Total U.S. Market	44
Figure 9: Andorran DA/DQ Market	55
Figure 10: Andorran Telephone Subscribers: Total	56
Figure 11: Andorran Telephone Subscribers	57
Figure 12: Andorran DA/DQ Call Volumes: Total	58
Figure 13: Andorran DA/DQ Call Volumes	59
Figure 14: Andorran DA/DQ Revenues: Total (Euros)	60
Figure 15: Andorran DA/DQ Revenues (Euros)	61
Figure 16: Austrian DA/DQ Market	62
Figure 17: Austrian Telephone Subscribers: Total	63
Figure 18: Austrian Telephone Subscribers	64
Figure 19: Austrian DA/DQ Volumes: Total	65
Figure 20: Austrian DA/DQ Volumes	66
Figure 21: Austrian DA/DQ Revenues: Total (Euros)	67
Figure 22: Austrian DA/DQ Revenues (Euros)	68
Figure 23: Number Assignments for Austria	69
Figure 24: Belgian DA/DQ Market	71
Figure 25: Belgian Telephone Subscribers: Total	72
Figure 26: Belgian Telephone Subscribers	73
Figure 27: Belgian DA/DQ Call Volumes (Total)	74
Figure 28: Belgian DA/DQ Call Volumes	75
Figure 29: Belgian DA/DQ Revenues: Total (Euros)	76
Figure 30: Belgian DA/DQ Revenues (Euros)	77
Figure 31: Number Assignments for Belgium	77
Figure 32: Cypriot DA/DQ Market	78
Figure 33: Cypriot Telephone Subscribers: Total	79
Figure 34: Cypriot Telephone Subscribers	80
Figure 35: Cypriot DA/DQ Call Volumes (Total)	81
Figure 36: Cypriot DA/DQ Call Volumes	82
Figure 37: Cypriot DA/DQ Revenues: Total (Euros)	83
Figure 38: Cypriot DA/DQ Revenues (Euros)	84
Figure 39: Danish DA/DQ Market	85
Figure 40: Danish Telephone Subscribers: Total	86
Figure 41: Danish Telephone Subscribers	87
Figure 42: Danish DA/DQ Call Volumes: Total	88
Figure 43: Danish DA/DQ Call Volumes	89
Figure 44: Danish DA/DQ Revenues: Total (Euros)	90
Figure 45: Danish DA/DQ Revenues (Euros)	91
Figure 46: Number Assignments in Denmark	92
Figure 47: Finnish DA/DQ Market	93



Western Europe: A Detailed Strategic Overview & Forecast

Table of Figures

Figure 48: Finnish Telephone Subscribers: Total	94
Figure 49: Finnish Telephone Subscribers	95
Figure 50: Finnish DA/DQ Call Volumes: Total	96
Figure 51: Finnish DA/DQ Call Volumes	96
Figure 52: Finnish DA/DQ Revenues: Total (Euros)	97
Figure 53: Finnish DA/DQ Revenues (Euros)	98
Figure 54: Assigned Numbers in Finland	99
Figure 55: French DA/DQ Market	101
Figure 56: French Telephone Subscribers: Total	102
Figure 57: French Telephone Subscribers	103
Figure 58: French DA/DQ Call Volumes: Total	104
Figure 59: French DA/DQ Call Volumes	104
Figure 60: French DA/DQ Revenues: Total (Euros)	105
Figure 61: French DA/DQ Revenues (Euros)	106
Figure 62: Assigned Numbers in France	106
Figure 63: German DA/DQ Market	109
Figure 64: German Telephone Subscribers: Total	110
Figure 65: German Telephone Subscribers: Total	111
Figure 66: German DA/DQ Call Volumes: Total	112
Figure 67: German DA/DQ Call Volumes	113
Figure 68: German DA/DQ Revenues: Total (Euros)	114
Figure 69: German DA/DQ Revenues (Euros)	115
Figure 70: Assigned Numbers in Germany	115
Figure 71: Greek DA/DQ Market	117
Figure 72: Greek Telephone Subscribers: Total	118
Figure 73: Greek Telephone Subscribers	119
Figure 74: Greek DA/DQ Call Volumes: Total	120
Figure 75: Greek DA/DQ Call Volumes	121
Figure 76: Greek DA/DQ Revenues: Total (Euros)	122
Figure 77: Greek DA/DQ Revenues (Euros)	123
Figure 78: Assigned Numbers in Greece	123
Figure 79: Iceland DA/DQ Market	125
Figure 80: Icelandic Telephone Subscribers: Total	126
Figure 81: Icelandic Telephone Subscribers	127
Figure 82: Icelandic DA/DQ Call Volumes: Total	128
Figure 83: Icelandic DA/DQ Call Volumes	129
Figure 84: Icelandic DA/DQ Revenues: Total (Euros)	130
Figure 85: Icelandic DA/DQ Revenues (Euros)	131
Figure 86: Irish DA/DQ Market	133
Figure 87: Irish Telephone Subscribers: Total	134
Figure 88: Irish Telephone Subscribers	135
Figure 89: Irish DA/DQ Call Volumes: Total	136
Figure 90: Irish DA/DQ Call Volumes	137
Figure 91: Irish DA/DQ Revenues: Total (Euros)	138
Figure 92: Irish DA/DQ Revenues (Euros)	139
Figure 93: Assigned Numbers in Ireland	139

Western Europe: A Detailed Strategic Overview & Forecast

Table of Figures

Figure 94: Italian DA/DQ Market	140
Figure 95: Italian Telephone Subscribers: Total	141
Figure 96: Italian Telephone Subscribers	142
Figure 97: Italian DA/DQ Call Volumes: Total	143
Figure 98: Italian DA/DQ Call Volumes	144
Figure 99: Italian DA/DQ Revenues: Total (Euros)	145
Figure 100: Italian DA/DQ Revenues (Euros)	146
Figure 101: Assigned Numbers in Italy	146
Figure 102: Lichtenstein DA/DQ Market	147
Figure 103: Lichtenstein Telephone Subscribers: Total	148
Figure 104: Lichtenstein Telephone Subscribers	149
Figure 105: Lichtenstein DA/DQ Call Volumes: Total	150
Figure 106: Lichtenstein DA/DQ Call Volumes	151
Figure 107: Lichtenstein DA/DQ Revenues: Total (Euros)	152
Figure 108: Lichtenstein DA/DQ Revenues (Euros)	153
Figure 109: Luxembourg DA/DQ Market	154
Figure 110: Luxembourg Telephone Subscribers: Total	155
Figure 111: Luxembourg Telephone Subscribers	156
Figure 112: Luxembourg DA/DQ Call Volumes: Total	157
Figure 113: Luxembourg DA/DQ Call Volumes	158
Figure 114: Luxembourg DA/DQ Revenues: Total (Euros)	159
Figure 115: Luxembourg DA/DQ Revenues (Euros)	160
Figure 116: Assigned Numbers in Luxemburg	160
Figure 117: Maltese DA/DQ Market	161
Figure 118: Maltese Telephone Subscribers: Total	162
Figure 119: Maltese Telephone Subscribers	163
Figure 120: Maltese DA/DQ Call Volumes: Total	164
Figure 121: Maltese DA/DQ Call Volumes	164
Figure 122: Maltese DA/DQ Revenues: Total (Euros)	165
Figure 123: Maltese DA/DQ Revenues (Euros)	166
Figure 124: Assigned Numbers in Malta	166
Figure 125: Dutch DA/DQ Market	168
Figure 126: Dutch Telephone Subscribers: Total	169
Figure 127: Dutch Telephone Subscribers	170
Figure 128: Dutch DA/DQ Call Volumes: Total	171
Figure 129: Dutch DA/DQ Call Volumes	171
Figure 130: Dutch DA/DQ Revenues: Total (Euros)	172
Figure 131: Dutch DA/DQ Revenues (Euros)	173
Figure 132: Assigned Numbers in The Netherlands	174
Figure 133: Norwegian DA/DQ Market	175
Figure 134: Norwegian Telephone Subscribers: Total	176
Figure 135: Norwegian Telephone Subscribers	177
Figure 136: Norwegian DA/DQ Call Volumes: Total	178
Figure 137: Norwegian DA/DQ Call Volumes	179
Figure 138: Norwegian DA/DQ Revenues: Total (Euros)	180
Figure 139: Norwegian DA/DQ Revenues (Euros)	181
Figure 140: Assigned Numbers in Norway	181

Western Europe: A Detailed Strategic Overview & Forecast

Table of Figures

Figure 141: Portuguese DA/DQ Market	182
Figure 142: Portuguese Telephone Subscribers: Total	183
Figure 143: Portuguese Telephone Subscribers	184
Figure 144: Portuguese DA/DQ Call Volumes: Total	185
Figure 145: Portuguese DA/DQ Call Volumes	186
Figure 146: Portuguese DA/DQ Revenues: Total (Euros)	187
Figure 147: Portuguese DA/DQ Revenues (Euros)	188
Figure 148: Assigned Numbers in Portugal	188
Figure 149: Spanish DA/DQ Market	190
Figure 150: Spanish Telephone Subscribers: Total	191
Figure 151: Spanish Telephone Subscribers	192
Figure 152: Spanish DA/DQ Call Volumes: Total	193
Figure 153: Spanish DA/DQ Call Volumes	193
Figure 154: Spanish DA/DQ Revenues: Total (Euros)	194
Figure 155: Spanish DA/DQ Revenues (Euros)	195
Figure 156: Assigned Numbers in Spain	196
Figure 157: Swedish DA/DQ Market	198
Figure 158: Swedish Telephone Subscribers: Total	199
Figure 159: Swedish Telephone Subscribers	200
Figure 160: Swedish DA/DQ Call Volumes: Total	201
Figure 161: Swedish DA/DQ Call Volumes	202
Figure 162: Swedish DA/DQ Revenues: Total (Euros)	203
Figure 163: Swedish DA/DQ Revenues (Euros)	204
Figure 164: Assigned Numbers in Sweden	204
Figure 165: Swiss DA/DQ Market	206
Figure 166: Swiss Telephone Subscribers: Total	207
Figure 167: Swiss Telephone Subscribers	208
Figure 168: Swiss DA/DQ Call Volumes: Total	209
Figure 169: Swiss DA/DQ Call Volumes	210
Figure 170: Swiss DA/DQ Revenues: Total (Euros)	210
Figure 171: Swiss DA/DQ Revenues (Euros)	211
Figure 172: Assigned Numbers in Switzerland	212
Figure 173: British DA/DQ Market	214
Figure 174: British Telephone Subscribers: Total	215
Figure 175: British Telephone Subscribers	216
Figure 176: British DA/DQ Call Volumes: Total	217
Figure 177: British DA/DQ Call Volumes	218
Figure 178: British DA/DQ Revenues: Total (Euros)	219
Figure 179: British DA/DQ Revenues (Euros)	220
Figure 180: Assigned Numbers in the United Kingdom	220
Figure 181: Western European Summary Telephone Subscribers: Total	223
Figure 182: Western European Summary Telephone Subscribers	224
Figure 183: Western European Summary DA/DQ Call Volumes: Total	225
Figure 184: Western European Summary DA/DQ Call Volumes	226
Figure 185: Summary Chart by Country for DA/DQ Call Volumes	227
Figure 186: Call Volume Growth Summary 2006 to 2011 by Country	228
Figure 187: Western European Summary DA/DQ Revenues: Total (Euros)	229
Figure 188: Western European Summary DA/DQ Revenues (Euros)	230
Figure 189: Summary Chart by Country for DA/DQ Revenues	231
Figure 190: Revenue Growth Summary 2006 to 2011 by Country	232
Figure 191: Summary Chart Average Price Points by Country	233

