A New Report

May 20, 2004

THE Pierz GROUP

The Pierz Group

asks the right questions!

Directory Assistance/Enquiry to Wireless Numbers in the European Market

This highly detailed report provides a detailed analysis of the opportunity for the introduction of wireless numbers to the directory assistance/enquiry (DA/DQ) database by country and by carrier in the European market. It highlights successes in Scandinavian markets and which key elements are applicable to other markets. Information is provided for 24 individual countries in both local currencies and Euros and is aggregated regionally.

This Report Includes:

- 112 Charts and Tables including
  - Key telephony statistics
  - Current & incremental revenues
  - Current & incremental volumes
  - Pricing levels for each market
- 24 Countries and 12 currencies with a regional roll-up in Euros
- Covers detail for the associated revenue impacts for each wireless carrier in this region
- Addresses privacy issues for individual markets
- Provides a steady state analysis of the revenue streams and call volumes for European countries where WDA is in place

Who Needs This Report?

- Directory assistance/enquiry providers interested in increasing revenues between 12 and 15 percent
- Wireless carriers seeking to increase average revenue per user (ARPU)
- Technology suppliers to the industry
- Venture capital firms and investors in the information services arena

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: $3,250; EIDQ members receive a 15% discount

Non-EIDQ members who purchase this report together with any other Pierz Group report (at the same time) will receive a 15% discount on both reports.

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Directory Assistance/Enquiry to Wireless Numbers in the European Market

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Mobile phones are increasingly an individual's main method of communication. For a growing number it is now their only phone, having eschewed a land line all together. In spite of their growing role in communications, outside of Scandinavia very few mobile numbers are included in directory assistance/enquiry (DA/DQ) databases or any type of directory. This represents a substantial opportunity for DA/DQ providers and wireless carriers alike. In Europe, the total opportunity is nearly €1.4 Billion in incremental revenues by 2008.

It also represents a substantial opportunity to improve service to customers and, The Pierz Group argues, to actually improve consumer privacy.

Executive Summary

Mobile subscriptions now represent more than half of all phone subscribers worldwide. In many countries, mobile subscribers significantly outnumber fixed line subscribers; this number continues to grow. With the exception of some plumbers and tow truck drivers, most of these mobile subscribers are not included in directory assistance/enquiry (DA/DQ) or in a print directory. Under this model, mobile subscribers are largely unreachable today, unless the caller has the number, they cannot call a mobile phone. Outside of Scandinavia, there is no national DA/DQ service for mobile phone numbers.

Research has consistently shown that if consumers are given a reasonable amount of privacy protection and, if point of sale communications properly direct consumers toward an opt-in program, consumers will list their mobile phone number. New, and even older, technologies are available to provide the needed privacy protection, and consumers want to be found - at least by those they want to find them.

Projections show this new offering, DA/DQ for mobile numbers or WDA (Wireless Directory Assistance), could grow to approximately 20 percent of DA/DQ markets where it is introduced. It would also add a significant number of additional mobile calls in these markets thus building both DA/DQ revenues and minutes of usage. Region-wide across Europe, the addition of wireless numbers to the DA/DQ database represents a total revenue opportunity in excess of an **incremental €1.4 billion annually** across European markets. This revenue figure includes an estimated €0.9 billion in incremental wireless revenues from increased call volumes.

Figure 1 on the following page provides the total number of telephone subscribers (main line fixed and wireless). Clearly, the highest growth in the region is coming from Eastern European countries and Turkey. It should be noted that total DA/DQ volumes do not necessarily correlate directly to the total number of telephone subscribers. For example, the United Kingdom has fewer total telephones than Germany, however, the DA/DQ market in the United Kingdom is larger than the German DA/DQ market, even with recent declines in the United Kingdom. It should also be noted that all of the countries profiled report more mobile phones than fixed line phones, with fully one third of the 24 countries covered boasting more than 65 percent of total phones being mobile, none of which have mobile numbers (in any significant percentage) in the DA/DQ database…

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. 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.

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