



Wholesale Directory Assistance/ Enquiry Today

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Group

Wholesale Directory Assistance/Enquiry Today

This high value, information-dense report is the definitive document on the wholesale directory assistance/enquiry industry worldwide. It outlines key drivers in the industry, market trends and provides a detailed review of the major players in the U.S., Europe and Latin America.

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Cubist painter Pablo Picasso could not have done a better job reorganizing the face of the directory assistance/directory enquiry (DA/DQ) industry in 2003. Dramatic shifts in market share and in the fortunes of key players occurred in selected markets, indicating the shape of things to come...

Executive Summary

Today's directory assistance, directory enquiry/inquiry (DA/DQ) market is highly dynamic and rapidly developing, at times changing seemingly overnight. Much of the development both in the United States and Europe has occurred due to the efforts of wholesale DA/DQ providers. In both the U.S. and Europe, third-party organizations have transformed the DA/DQ landscape, introducing more competition, creating a new growth sector for DA/DQ services, and providing innovative service offerings for customers.

The development of the wholesale DA/DQ market has been largely a result of the rise in mobile phone use in the U.S. and Europe. In the U.S., wholesale providers have gained significant market share in direct proportion to the surge in wireless phone usage throughout the country. European wholesale providers also have captured a large percentage of the wireless market as well as the fixed line market in competitive markets. If predicted growth for worldwide wireless use continues, wholesale DA/DQ providers will likely enjoy new growth and increased revenue opportunities for years to come.

Government regulations have also played an important role in wholesale growth. For example, the U.S. Telecommunications Act of 1996, which directed Regional Bell Operating Companies (RBOCs) to open their local copper loop networks to new telecommunications carriers, led to an explosion of new service providers and enabled mobile phone operators to connect calls to anyone using a mobile or fixed-line phone. This new environment provided fertile ground for wholesale DA/DQ providers.

In Europe, Telegate AG's pioneering efforts convinced German regulators to create a competitive DA/DQ playing field in Germany. Telegate capitalized, capturing over 25 percent of the country's DA/DQ call volumes within 18 months and setting the stage for a

liberalization of the market in 10 other countries, with additional countries following suit and others expected to do so in the future.

With deregulation well under way in Europe, attempts to open and liberalize the U.S. market remain ongoing. Chances have dimmed. However, competition among wholesale and RBOC DA/DQ providers continues to stir the cauldron, promising to alter the industry within the next three to five years.

This report presented by The Pierz Group reviews the current conditions of the U.S. and European wholesale DA/DQ markets and provides in-depth overviews of the major third-party (non-carrier) providers in their respective markets. In addition, The Pierz Group forecasts future trends and movements in the DA/DQ industry, and presents recommendations providers can leverage for strategic planning.

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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About the Authors

Mark Blumberg

With more than 24 years experience as a researcher and writer, Mr. Blumberg has focused exclusively on the telecommunications industry for the last nine years. His technical reports and white papers for companies such as Cisco and 3Com have explored a wide range of technologies, including fixed-line, mobile, and IP telephony, broadband (cable and DSL), and networking.

Before becoming a technology writer, Mr. Blumberg worked for 15 years as a journalist, first as an intern for PBS in Los Angeles, where he developed a short documentary that was nominated for an Emmy award. Later, he worked as a judicial profiles writer for the Los Angeles Daily Journal, the largest legal publication in the U.S.

Mr. Blumberg holds a Bachelor of Arts degree in fine arts from California State University, Long Beach. He studied journalism at Cal State L.A., where he was elected to serve as editor-in-chief of the award-winning University Times.

Kathleen Pierz

The Pierz Group was founded by Kathleen Pierz in 2003. Ms. Pierz is one of the best known industry analysts in the directory assistance/enquiry space. She has published over 100 insightful reports on the key issues affecting the industry worldwide and is a sought after speaker. With over 25 years of strategic planning and marketing experience and a solid background in the information services industry from both the carrier and the vendor side of the business, she delivers a focused, actionable perspective within this dynamic market.

Prior to founding The Pierz Group, Kathleen Pierz held senior management positions at Zelos Group, The Kelsey Group, IBM and Ameritech (now SBC)

Ms. Pierz holds a Master's degree in International Management from the American Graduate School of International Management (Thunderbird) and a Bachelor of Science Degree in Business from The University of Colorado.