

2021 Tariff Trend Report: The Growth in Fixed Mobile Convergence (FMC) plans worldwide - A survey of 36 Operators' FMC offerings

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Abstracts

MNOs in selected markets worldwide are launching Fixed and Mobile (FMC) services, with the aim of increasing revenue and ARPU levels and reducing churn. In this report, telecomspricing has identified and surveyed some 36 MNOs who are offering some form of converged service (defined as being a Fixed and Mobile plan combination or discount applied to users of a converged service) worldwide.

The converged offers made by these 36 MNOs vary extensively. Some MNOs offer a simple discount for the purchase of a multi-play service consisting of a Fibre Broadband and a Mobile plan, whilst others provide a converged product based on a Fibre Broadband and a Mobile plan. But the introduction of FMC services is still very much a European phenomenon and is not so common in other parts of the world.

The FMC survey Telecomspricing has identified four key reasons for the introduction of FMC services shown below:

FMC services are seen as a way of providing a new revenue stream with fixed line as well as mobile services being added – with a natural pathway for extra bundles of content, TV and now smartphones (with 5G smartphones now offering a revenue uplift) also offering the prospect of additional revenues in the future.

FMC services are seen as a way of reducing churn levels - As additional services are sold to subscribers' user stickiness increases – even though some established convergence players (such as Movistar Spain) are reporting increased churn this appears to be a passing phase.

FMC services offer revenue protection even at times of “hyper-competition” – For example although there are revenue falls for converged services offered by Orange Spain the revenue falls in Spain for converged services remain less than for mobile only services.

FMC services offer the opportunity to convert all household members to a single telecoms provider with a mix of flexible services, content & discounts for additional mobile users and enabling future growth.

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