



**The hidden  
opportunity for  
mobile operators:  
the underserved  
SOHO & SME markets**

A person's hand is holding a smartphone, with a city skyline visible in the background. The image is dark and moody, with the text overlaid in the center.

The European mobile market is  
at an inflection point

# The European mobile market is...



Challenging



Competitive



Saturated



And it's getting  
**more challenging...**

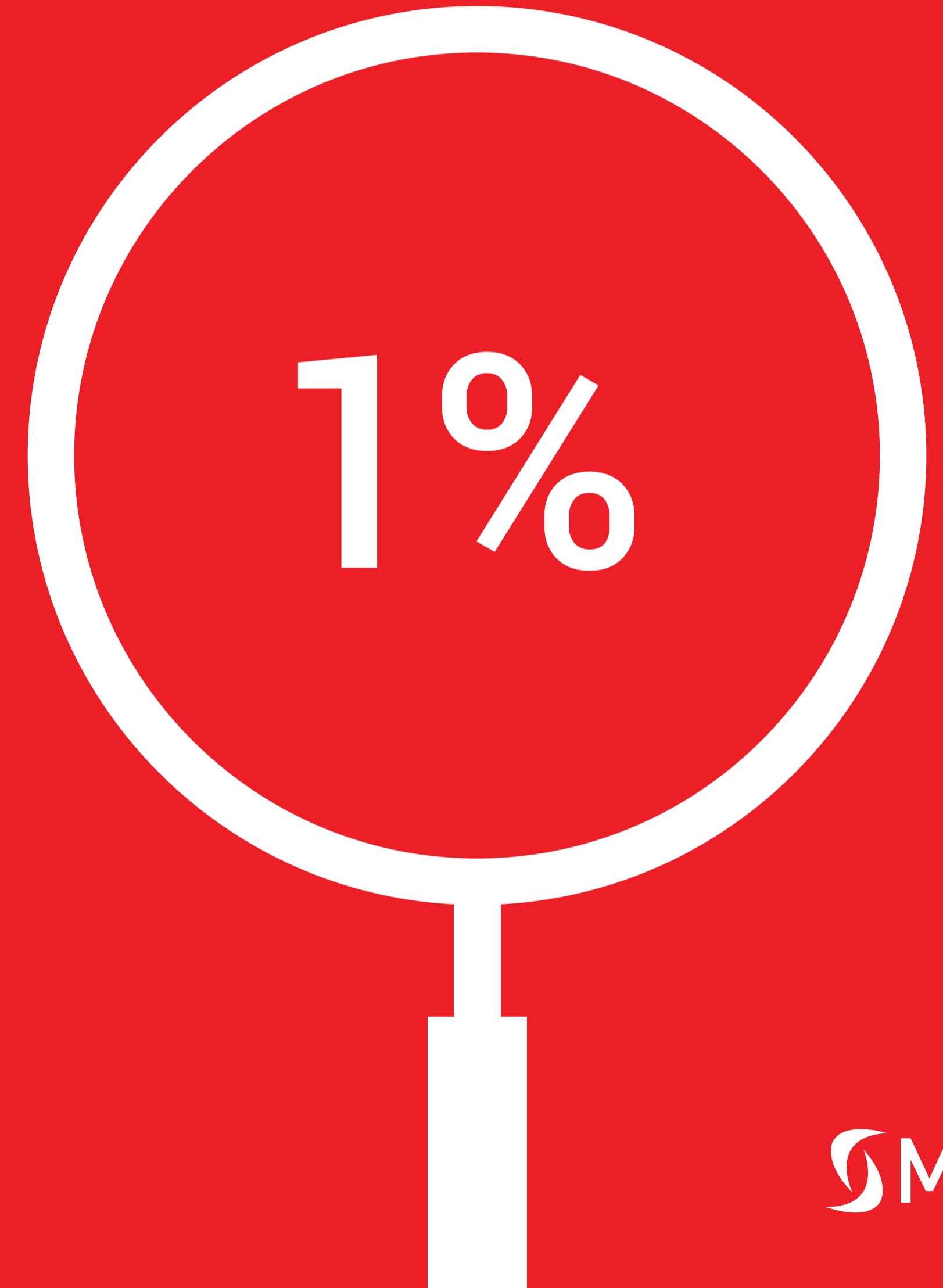
There are **fewer**  
**new subscribers**

The GSMA forecasts  
only 20 million extra  
subscribers by 2020

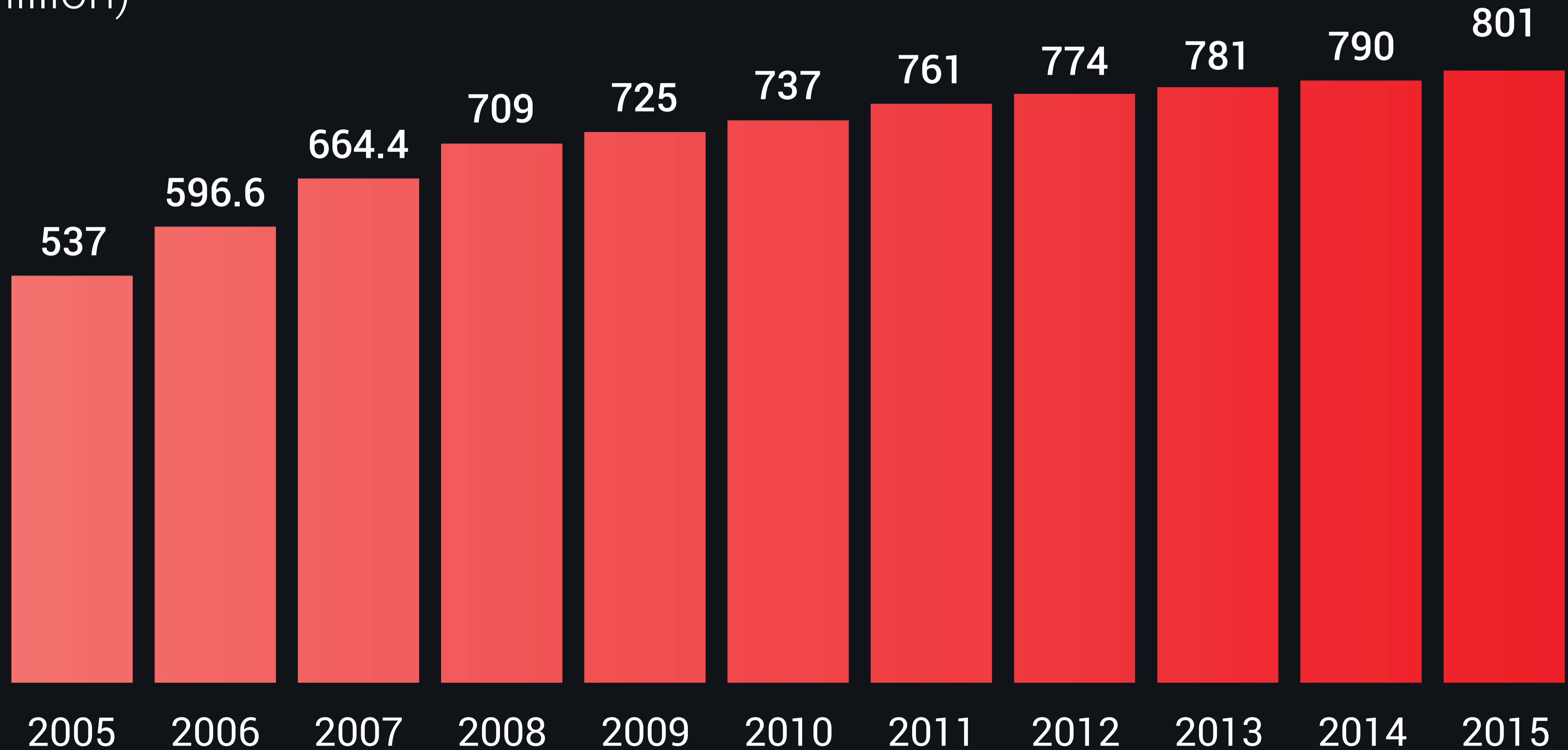


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This represents an annual  
growth rate of **only 1%**



# Total unique subscribers in Europe (million)



2014

1.3GB  
per user  
per month

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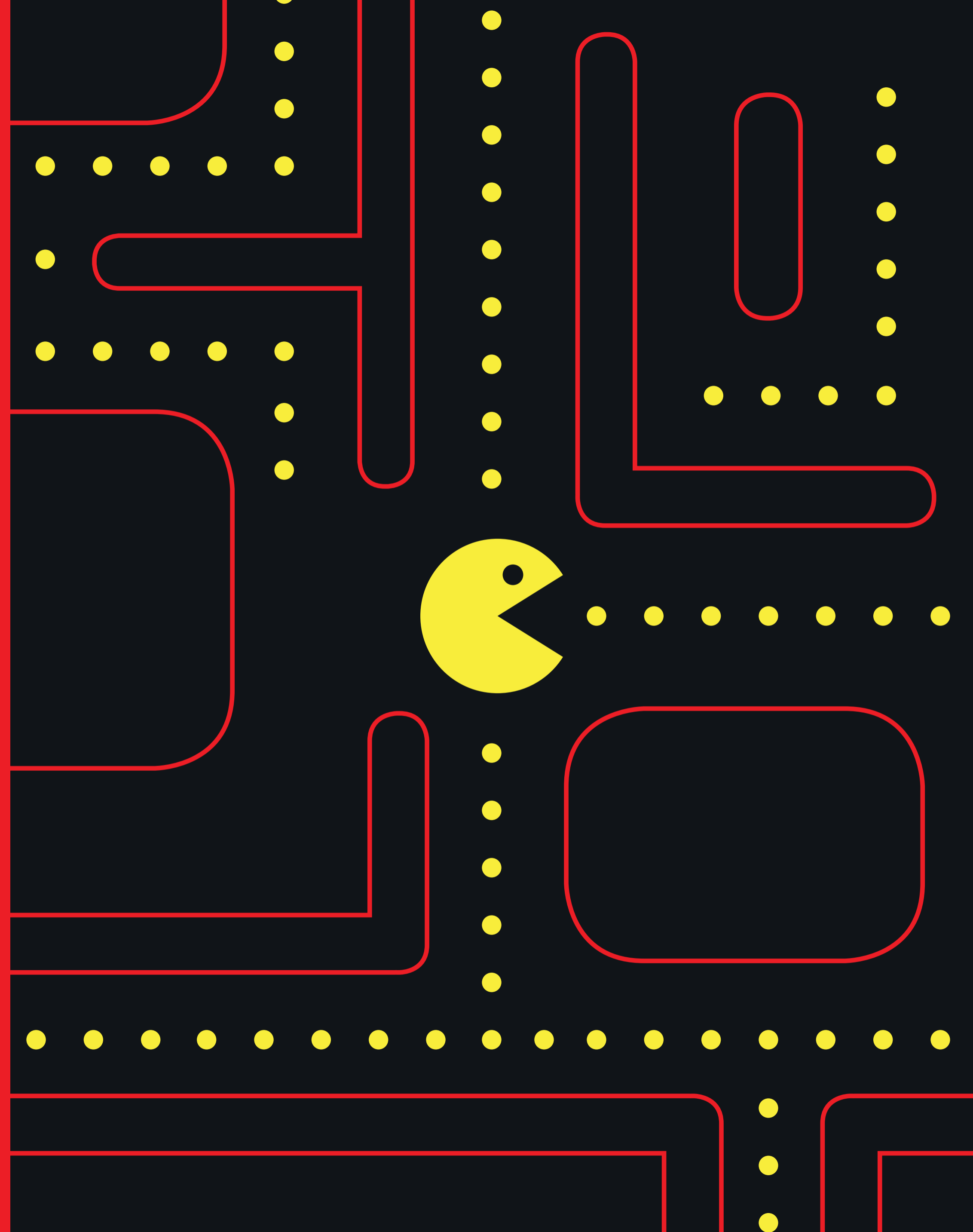
2019

9.9GB  
per user  
per month  
(est)



Mobile operators are  
**slowly returning to  
growth...**

By **moving away from all  
you can eat** models and  
returning to **tiered data  
consumption plans**



Traditional operator  
strategies are  
**no longer working**

%

Discounts  
are far less  
effective

£

Nobody  
wins in a  
price war

THE KEY QUESTION IS...

How can you  
**increase profitability**  
through differentiation?

A new  
**hybrid opportunity**  
is emerging...

Nearly **96%** of all  
UK businesses have  
**0–9** employees



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UK businesses have  
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That's over **5 million**  
businesses



The majority of these  
businesses are on  
**consumer mobile  
contracts**



## **A HIDDEN MARKET**

SMEs/SOHOs see little  
advantage in telling their  
operators they are a business

The background of the slide is a dark, textured surface composed of numerous overlapping, slightly out-of-focus coins, likely US quarters, creating a sense of depth and value.

Most perceive business  
contracts to offer them  
**few benefits** at **high cost**

They are ~~undeserved~~ underserved



Today's smartphone savvy user expects:

- the same **flexibility,**
  - the same **instant gratification,**
  - the same **real time experience**
- whether **personal**  
**or business**



A consumer wants a **fully convergent** service

The SME user wants exactly the same and is willing to **add additional services**



Office 365





A consumer wants to see what data is being used – to control costs in real time

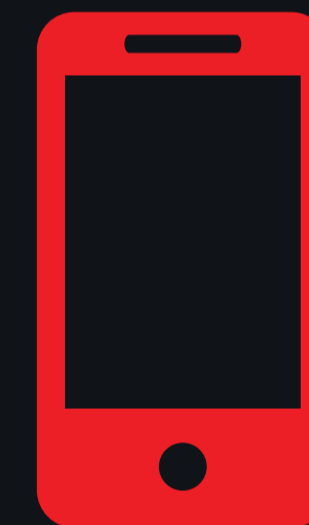


So too does the SME, who also wants **analytics** to see how services are being consumed

There is a huge potential  
to reach this untapped,  
hybrid market with...



More  
self  
service



A wider range  
of digital  
products



More  
personalised  
offers

A young boy with dark, curly hair is looking upwards with a hopeful expression. He is holding a bowl of food, possibly a salad or a bowl of rice with vegetables. The background is dark and out of focus, suggesting an outdoor setting at night or in a dimly lit area. The overall tone is somber but hopeful.

# Serving the underserved

# The Harvard Business Review model

## CORE

Optimise  
your  
existing  
offer

## ADJACENT

Expand your  
offers/solutions  
into adjacent  
areas

## TRANSFORMATIONAL

Transform your  
offer(s) into new  
markets and  
innovate

# CORE

- Use analytics to target and segment these hidden customers
- Provide them with additional billing features and transparency
- Develop new tariffs that will benefit them

# ADJACENT

- Personalise the tariff and services based on what the customer values
- Optimise the experience via an app
- Offer multipay to consolidate spend with fully convergent billing
- Offer prepay, postpay, paynow, subscription, hybrid
- Simplify your offerings

# TRANSFORMATIONAL

- Deepen insights and optimise via analytics
- Use data to support decisions on new offerings
- A lean approach to product development

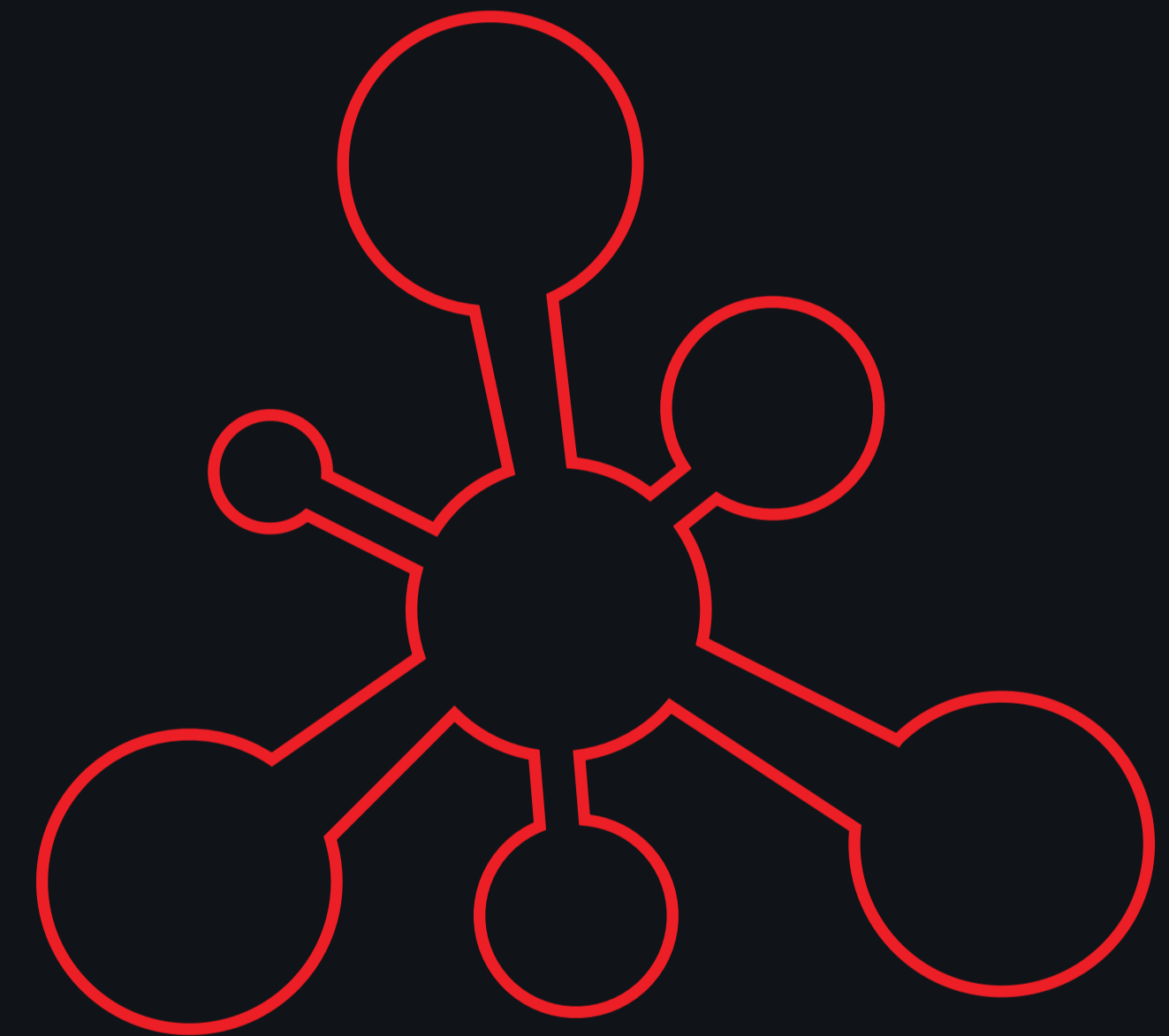


What does this  
mean for you?

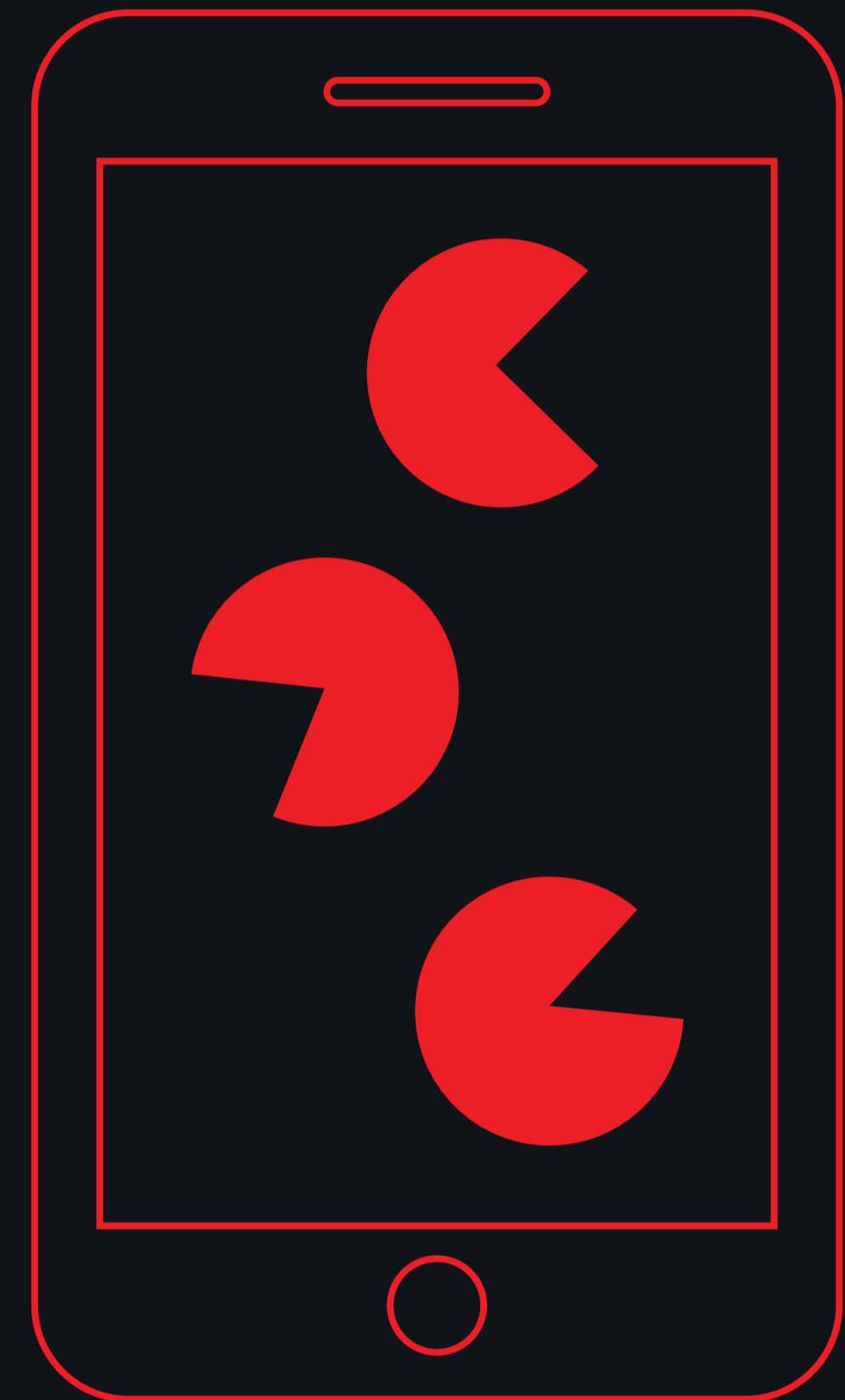
Understand underserved  
segments and launch  
differentiated offers  
quickly



Compete and  
innovate quickly  
by utilising an agile  
digital platform



Deliver transparency  
and control in real time  
via an app to suit  
SOHO and SME





MDS Global is helping companies like yours



MDS Global is helping companies like yours  
take advantage of **hidden opportunities...**



MDS Global is helping companies like yours  
take advantage of **hidden opportunities...**  
deliver **real time customer experiences...**



MDS Global is helping companies like yours  
take advantage of **hidden opportunities...**  
deliver **real time customer experiences...**  
and deliver **actionable analytics**

For brands like these...



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