



Case Study

Market Study of Mobile Operators' Opportunities in the Connected Homes Market

About the Client

- The client is among the top 10 mobile network operators in the world with presence across Europe and South America
- It is the market leader in most of its countries of operations and focused on delivering advanced networks and digital services

Business Objective

- The client was exploring growth opportunities in alternate businesses and asked RocSearch to provide an understanding about the Connect Homes market
- They were mainly interested in the strategies adopted by various mobile operators on a global scale to replicate the same in its domestic market

Results & Value Add

- RocSearch provided a PowerPoint presentation, which included case studies of more than 10 mobile operators significantly active in the Connected Homes space
- The presentation also included an analysis of the success measures adopted by the operators, cases of failure or low consumer uptake of Connect Homes, and deployable suggestions for the client

Research Methodology and Approach


- Since the client had minimal understanding about the new market, the team ensured that all the technical details in the presentation were provided in layman English
- We first decoded the technology and captured all the necessary details related to it. Then, we leveraged our exclusive accesses to various databases to collect all the literature on the topic
- We deployed a two-member team - an analyst and an editor - for two weeks to ensure that the presentation was easily readable and at the same time informative
- The team conducted several telephonic calls with the client at various stages of the project to ensure that our findings were in-line with the client expectations
- We further explored the Connected Homes market on a special follow-up request from the client, assuring that the client had developed an in-depth understanding about the market

Screenshots


Most operators are offering remote security and energy management solutions; relatively much lesser are also offering environment control services

Country	Operator ¹	Smart Home offering	Smart Home Areas			Sources of revenue generation			Existing or expected traction
			Remote security	Environment control	Energy management	Own platform	Monthly subscription	Selling devices	
Belgium	Belgacom	Belgacom Home Control	✓	✗	✓	✗	✓	✓	🔴
France	Booyes	Smart Grid Ready	✓	✗	✓	✓	✗	✗	🟢
Germany	EnBW	QIVICON	✓	✓	✓	✓	✗	✓	🟢
South Korea	KT	kt telecop	✓	✗	✗	✗	✓	✓	🟢
Canada	Orange	Intelligent Home	✓	✗	✓	✗	✗	✓	🔴
Canada	Rogers	Smart Home Knowledge	✓	✓	✓	✓	✓	✓	🟢
France	SFR	HOME by SFR	✓	✓	✓	✗	✓	✓	🟢
Switzerland	swisscom	Quing Home	✓	✗	✓	✗	✓	✓	🔴
Italy	TELECOM	Energy@home	✗	✗	✓	✓	✗	✗	🟢
Denmark	telenor	SMART METERING	✓	✓	✓	✓	✗	✗	🔴
USA	verizon	Home Monitoring and Control	✓	✓	✓	✗	✓	✓	🔴

Orange in Poland launched its smart homes offering 'Intelligent Dom' in May 2013 after partnering with monitoring and control platform developer MIOS



Operator



'Intelligent Dom'

Remote security

✓

Environment control

✗

Energy management

✓

• In May 2013, Orange Poland launched its smart home offering 'Intelligent Dom', which is based on the advanced monitoring and control platform developed by MIOS, and positioned by the operator as its 2nd Gray Service
 - 'Intelligent Dom' is a customizable and scalable offer to enable customers add devices from partners to their home networks
 - Continuing its partnership with MIOS, Orange plans to launch the service in France in 2014 summer, and in other European countries as well
 - Orange aims to offer its customers a set of services in 5 categories: security, comfort, energy, health & wellness and entertainment

Product / service details		Pricing details		Consumer traction / reviews	
Detail		Pricing / Offering		Metrics	Result
Intelligent Dom (Smart House): A private and secure home management center - The service's main component include a box and a single interface to manage all connected objects in the home - In addition, customers can choose one of the following sensors as part of bundled offering: - Smoke detector - Doors and windows sensor - Motion detector - Flood sensor - Switch socket - Customers can also buy other connected devices such as camera, switch, power meter from Orange Poland online store.		• Service is offered for free and bundled with Orange Poland's broadband packages 'Vesstrade' and 'FullFiber' • However, users have to buy connected devices from Orange online store • Smoke detector, motion sensor, flood sensor and door and window opener each priced at PLN 219 • Window and door sensor: PLN 249 • Switch socket: PLN 209 • Camera: PLN 239 • Quiet meter switch: PLN 269		Users' rating of 'Intelligent Dom' app on the Google Play store 4.1/5 🟢	
				Number of installations 1,000 - 5,000 🔴	
Observations: Since the operator's goal is to make an open platform for smart homes, the services or devices provided by Orange partners make the operator's smart home offer scalable. However, the number of 'Intelligent Dom' app downloads are still very low, which indicates that there is still a low consumer traction for this service.					



rocsearch
advantage through intelligence

Contact Us

Business Enquiries – sales@rocsearch.com

General Enquiries – info@rocsearch.com

www.rocsearch.com