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Voice applications opportunities in the EMEA

Peter Ryan

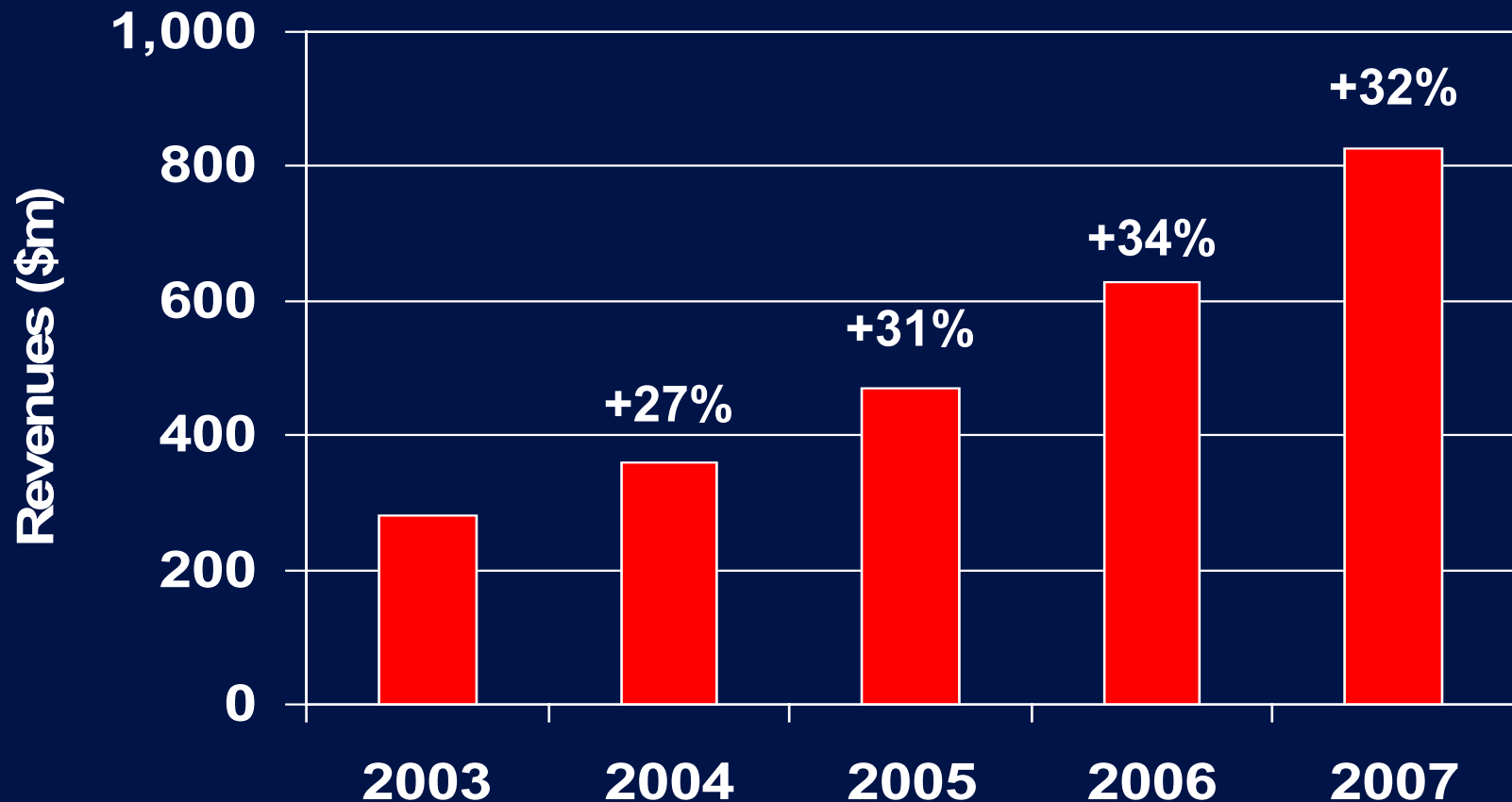
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Agenda

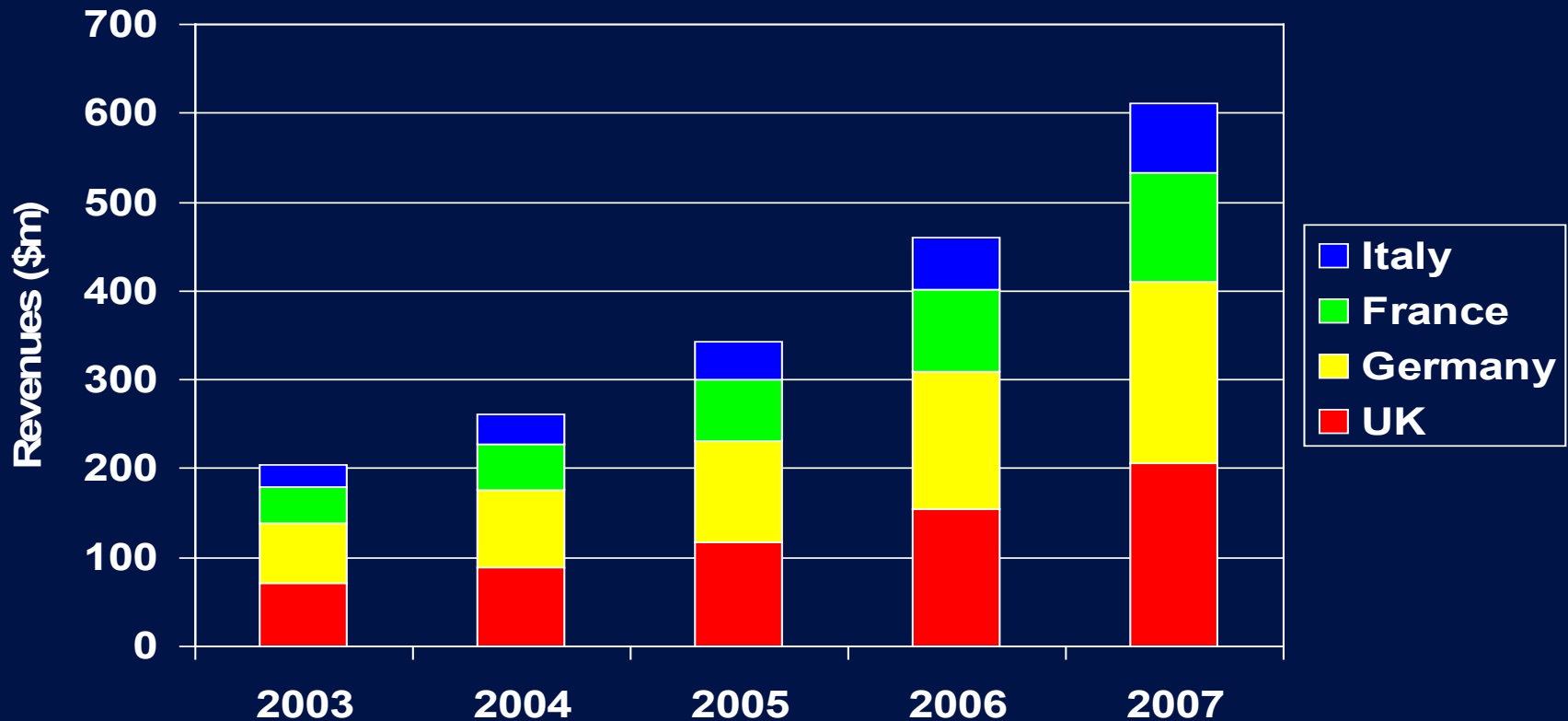
- **Introduction**
- **Geographic voice applications discussion**
 - Market sizing
 - 'Big 4' markets
 - Emerging countries
- **Voice applications vertical adoption**
 - Overall market shift
 - Key vertical shift

EMEA voice applications revenue growth, 2003 - 2007



- Rapid growth in EMEA voice revenues as global economy recovers

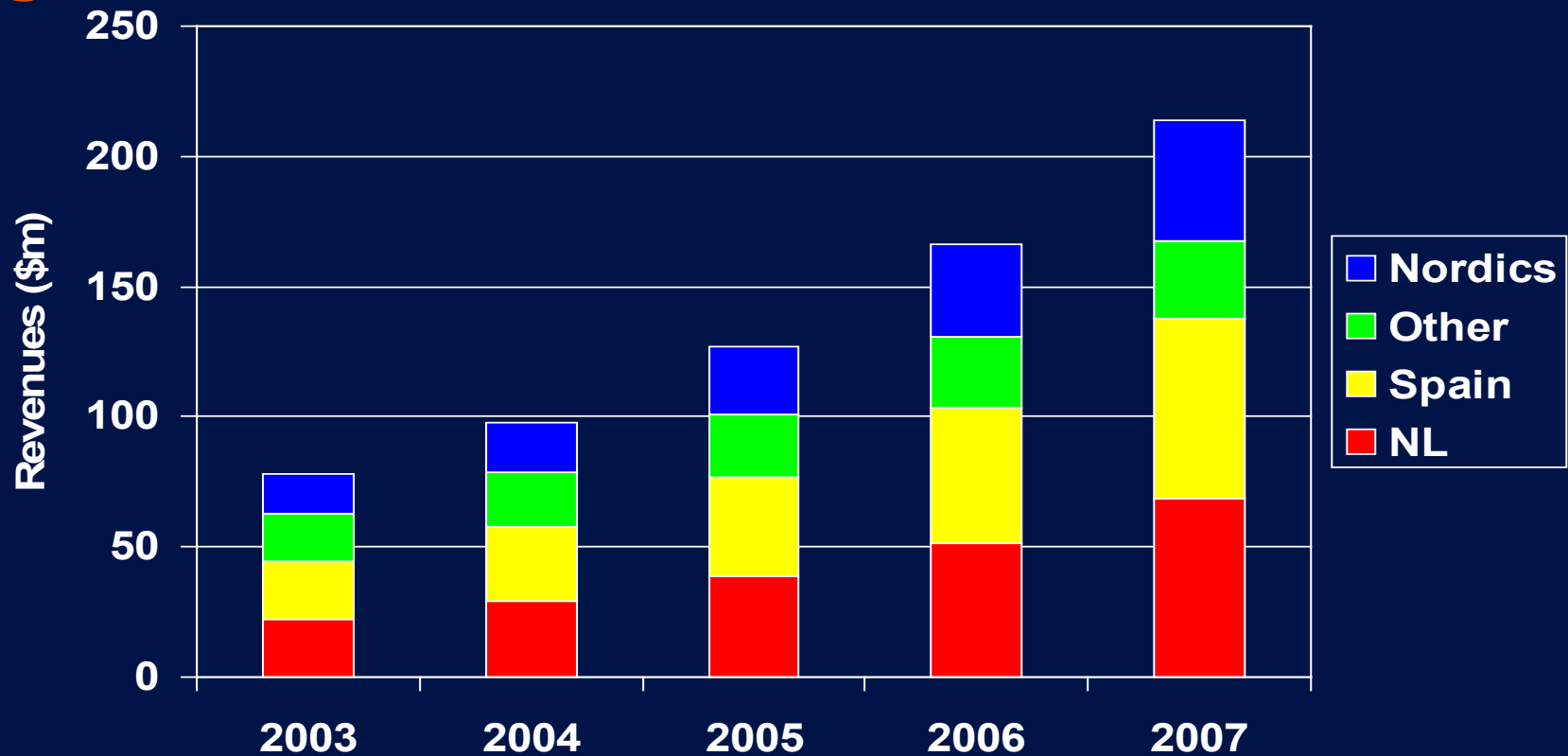
'Big 4' EMEA geographies voice application growth, 2003 - 2007



Growth drivers

- **UK and Germany:** Deregulation, multilingual voice engines and economic growth
- **France:** voice adoption prompted by labour market reform
- **Italy:** resistance to voice, coupled with rising mobile telephony

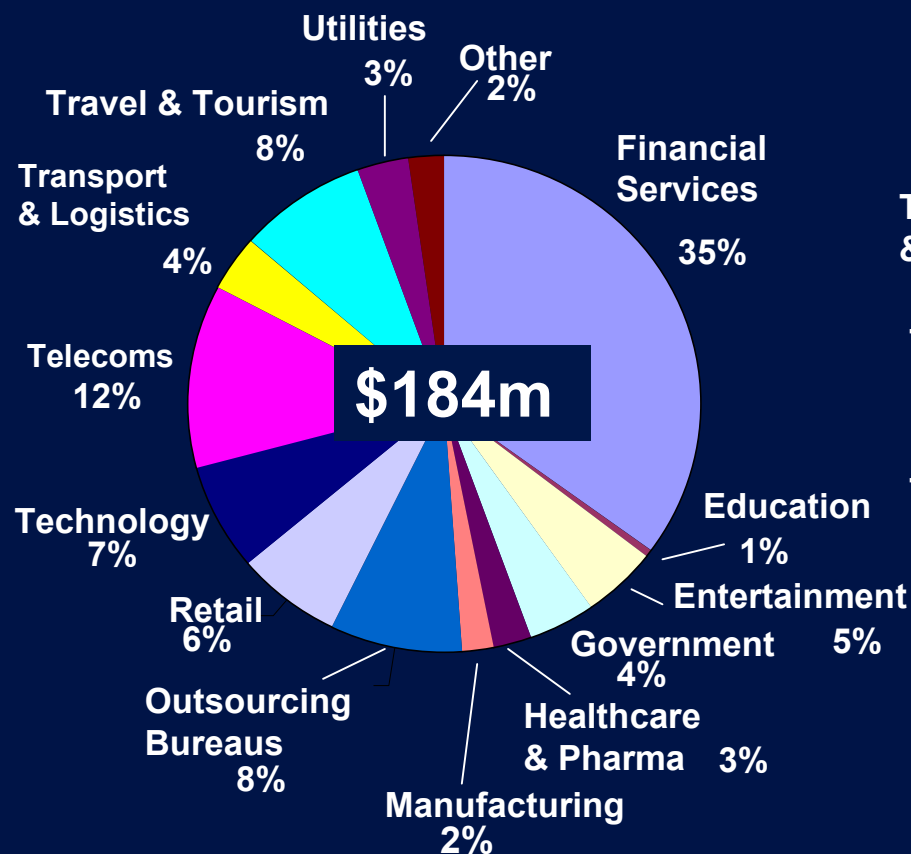
Other EMEA countries voice applications growth, 2003 - 2007



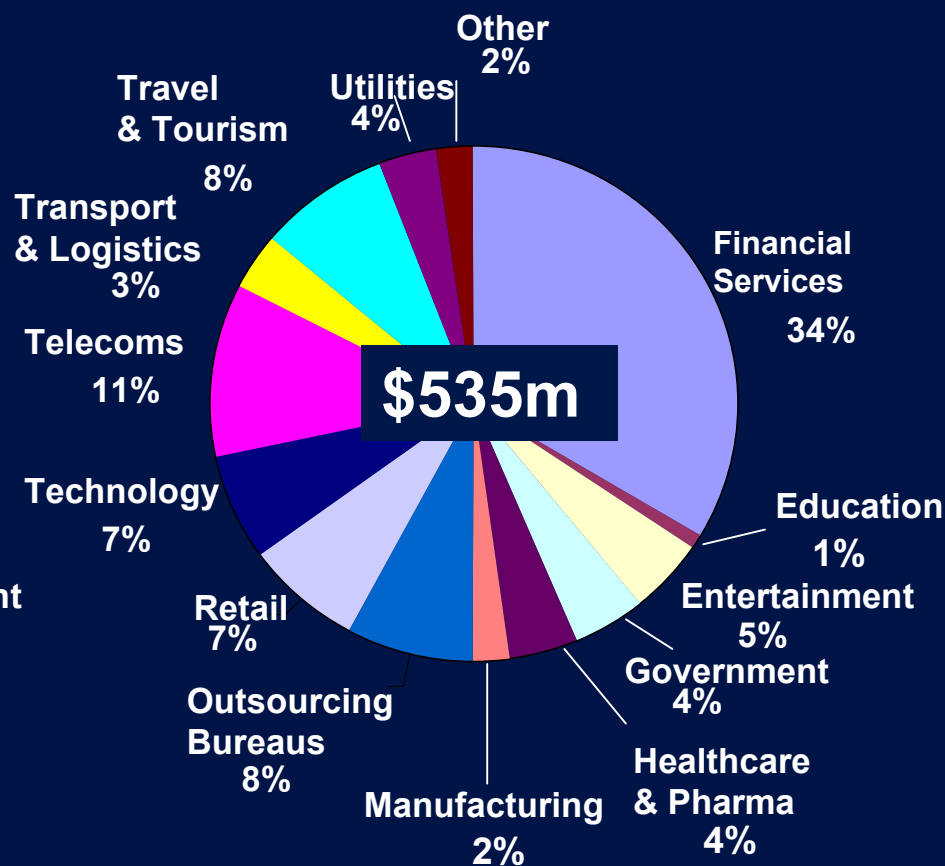
Growth drivers

- **Nordics & Netherlands:** Multilingualism and localisation
- **Spain:** Economic growth and cultural shift
- **Other:** Mainly South Africa, surrounding technology catch-up

EMEA vertical market voice application revenue shift, 2003 - 2007



2003



2007

- **Financial services** is and will remain the largest vertical voice customer
- **Health care** will grow the fastest among all verticals

Major vertical voice application shifts – EMEA, 2003 - 2007

<u>Vertical</u>	<u>2003</u>	<u>2007</u>
↑ Retail	6.4%	7.3%
↑ Insurance	5.6%	7.0%
↑ Government	4.7%	4.9%
↑ Health Care / ↑ Pharmaceutical	2.6%	4.1%
↑ Utilities	3.3%	3.6%
↓ Retail banking	14.8%	13.9%
↓ Telcos	11.9%	11.0%
↓ Outsourcing bureaus	8.5%	7.6%

Conclusions

- **EMEA will be a strong market for voice applications**
 - UK, Germany, France: Deregulation, labour reform, economic recovery
 - Italy / Spain: Cultural affinity to voice
 - Nordics / Netherlands: Increased localisation
- **Verticals segment shifts**
 - **Big movers: Retail, insurance, health care / pharmaceuticals, government, utilities**
 - **Decline: Telcos, retail banking, outsourcing bureaus**

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