Apple Pay's Successful Positioning in the Mobile Wallet Market and CSP Strategic Responses

Description: Apple Pay was launched on 20 October 2014 and was initially available at 220,000 retail locations in the USA. It is poised to take up a dominant position against competing mobile payments platforms, including initiatives by communications service providers (CSPs). Apple Pay's architecture completely bypasses operators' ability to control payment details, and challenges their capacity to meaningfully insert themselves in the mobile payments value chain.

This report explores the increasingly competitive mobile payments space, and the challenges it presents for CSPs. It also identifies the key factors that have enabled Apple to position Apple Pay for success against competing mobile payments platforms, including:
- device leadership through handsets and smart wearable devices
- hardware and software security advantages: what they are and how they work
- key partnerships across the entire payments value chain
- physical retail, online commerce and digital content distribution experience
- an auspicious set of circumstances and timing, from changing patterns of user behaviour to the roll-out of Europay, MasterCard and Visa (EMV) 'chip-and-pin'compliant payments in the USA.

This Viewpoint:
- identifies the key factors that have enabled Apple to position Apple Pay for success against competing mobile payments platforms
- explores the increasingly competitive mobile payments space, and the challenges it presents for CSPs
- provides details of Apple's strategy with Apple Pay, and how it fits with the rest of Apple's device ecosystem
- summarises Apple Pay's architecture, and the way that it provides Apple with a competitive advantage
- provides recommendations for CSPs.

Key questions answered in this report:
- What is Apple Pay, and what makes it different from competing mobile payments platforms?
- What is Apple's business model and strategy with Apple Pay?
- Will Apple launch Apple Pay in markets beyond the USA?
- What are the key elements by which Apple has positioned itself for success in the mobile payments space for both in-store and online transactions?
- How will Apple Pay impact CSPs' mobile wallet and payments initiatives?
- How does Apple Pay's architecture allow Apple to completely bypass CSPs' attempts to control users' payment and transaction data?

Who needs to read this report:
- Strategy executives, and directors and managers within mobile operators who are developing and implementing mobile payments initiatives, or designing the response to Apple Pay.
- Vendors and software developers involved in the development and integration of platforms and software who wish to understand how Apple Pay changes the competitive landscape of mobile payments.
- Industry experts and observers who wish to better understand Apple's strategy and how the company is positioning Apple Pay as part of its ecosystem.

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