

Belgium Telecommunications Report Q2 2016

<https://marketpublishers.com/r/BCC025763E9EN.html>

Date: February 2016

Pages: 51

Price: US\$ 1,295.00 (Single User License)

ID: BCC025763E9EN

Abstracts

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BMI View: Belgian operators are looking to upgrade and upsell new services to their customers, recognising that widening is over and that deepening must become a core strategy. Convergent and 4G services have driven the market in 2015, but there remain some strong opportunities as many users are still on basic services, whether DSL or mobile-voice only. The lack of fibre will hinder the fixed broadband market in the long run, but the regulator must implement local loop unbundling to ensure stronger competition in the market, especially if the Telenet/BASE deal is approved by EU regulators.

Key Data

The mobile market declined by 130,000 in Q315, to reach 13.26mn, because of strong MVNO losses from Mobistar. Further discounting may occur as part of the Telenet/BASE deal, and it highlights the stronger focus on postpaid services.

The broadband market is dominated by DSL, and its VDSL variation, and cable, as FTTx only represents 0.2% of the market.

6.4mn customers were on 3/4G as of 2014 according to the regulator, but 4.58mn were still only using mobile voice services.

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