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Abstracts

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BMI View: The Danish telecommunications market is highly mature and increasingly focused around value-added premium services. Most notably, while the broadband market is growing steadily on the back of demand for converged services, the mobile sector is beginning to show signs of fatigue, with periodic declines in subscriber numbers linked to the retirement of low-value or inactive accounts. Curiously, adoption of M2M services lags behind other equally advanced European markets, although growth now seems to be accelerating. In this environment, there are scant opportunities for new or risk-averse investors, although the potential for niche value-added services is far from played out.

Key Data

The wireline market is forecast to continue shrinking, from 1.991mn connections in 2014 to 1.619mn by 2019. This is despite continued interest in VoIP connections.

The wireline broadband market is growing steadily, driven by the increased availability of very highspeed accesses such as fibre, VDSL and DOCSIS 3.0 cable modems. Subscriptions are forecast to grow from 3.535mn in 2014 to 3.906mn in 2019.

The mobile market has matured. There were 7.884mn subscriptions as of 2014, a figure we forecast to rise to 7.935mn by 2019. Underlying growth comes from 3G/4G migration and the movement of customers from prepaid to contract plans.

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