

Denmark Telecommunications Report Q3 2016

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Abstracts

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BMI View: The Danish telecommunications sector will experience limited growth over our forecast period due to the saturated nature of the market. Growth in mobile market subscriptions will stagnate as operators focus on offering additional services for existing customers, while fierce competition will continue to drive ARPUs downwards. The fixed-line segment offers some room for growth, with operators moving towards advanced services, such as fibre, to regain market share from mobile broadband.

The mobile market in Denmark performed poorly in 2015, with the number of subscribers falling by 2.9% y-o-y to 7.48mn. We forecast this number to decrease slightly to 7.37mn in 2020 as operators will focus on retaining existing customers through new services, rather than attempting to attract new users.

Usage of 3G/4G networks continues to rise, with virtually all mobile subscribers forecast to have access to such services by 2020. Demand for dedicated mobile broadband subscriptions will fall over 2016-2020 as 4G facilitates low-cost voice- and data service uptake.

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