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Germany Telecommunications Report Q1 2016

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Abstracts

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BMI View: We have positively revised our outlook for the German mobile market in Q1 2016. The German mobile market remained positive in the first three quarters of 2015 without posting negative subscriber losses. We believe that the market will be split into three main operators after O2 purchased E-Plus to become the dominant provider. Following consolidation, we believe the market will further split between the main three operators. These will look at convergence and advanced services (LTE, fibre, etc) and the remaining no-frills segment, led by MVNOs and resellers, to drive revenue growth. The strength of the latter will continue to have a negative impact on ARPU, with one of the lowest figures in Western Europe.

The saturated market makes convergence and bundling core strategies to survive, and to invest into advanced services, and we would expect consolidation to occur in the fixed broadband market, as a better to compete with stronger fully convergent fixed-mobile players. This will further increase the tension between the two trends of the market, as consolidation will lead operators to focus on premium services to recover their investments.

Latest Updates & Industry Developments

Mobile subscriptions jumped by a total of 769,000 in the first three quarters of 2015 after witnessing a significant decline in the aftermath of the O2 purchase of E-Plus due to inactive sim deactivation.

ARPU remains very low in Germany despite the premium strategy, with figures between EUR10 and EUR15 for the three main operators.

The fixed market will develop though convergence, led by Deutsche Telekom's move to IP services, VDSL and fibre, IPTV and quad-play bundles.

Data ARPUs are rising and we believe this segment will be crucial to market growth opportunity.

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