

# Germany Telecommunications Report Q3 2015

<https://marketpublishers.com/r/GC2EE9B7726EN.html>

Date: May 2015

Pages: 125

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

ID: GC2EE9B7726EN

## Abstracts

Includes 3 FREE quarterly updates

### Key Data

Mobile subscriptions have decreased due to the consolidation to 112.6mn in 2014, but the market will recover to 115.9mn by the end of 2019. The market is buoyed by robust mobile virtual network operator (MVNO) expansion and customer migration to 4G (LTE).

Improved mobile subscriber mix and the loss of non revenue-generating inactive subscriptions at Vodafone (and likely also at O2 after the E-Plus acquisition) should lead to a small improvement in the rate of average revenue per user (ARPU) erosion. However, the trend remains downward overall. BMI forecasts industry average ARPUs to fall from EUR13 in 2014 to EUR12 in 2019.

### Key Developments

The German government plans to auction two blocks of 30MHz frequencies in the 700MHz band. Mobile broadband services using this spectrum will be phased in from 2017. The auction will take place in H115, at the same time as a separate auction for 900MHz and 1800MHz frequencies, rights to which expire at the end of 2016. Lots, consisting of two paired blocks of 5MHz in the 700MHz band, will be offered at a starting price of EUR75mn per lot.

## Contents

BMI Industry View

SWOT

Mobile SWOT

Wireline SWOT

Political

Economic

Operational Risk

Industry Forecast

Mobile

Table: Telecoms Sector - Historical Data & Forecasts (Germany 2012-2019)

ARPUs

Fixed-Line

Table: Telecoms Sector - Wireline - Historical Data & Forecasts (Germany 2013-2019)

Industry Risk/Reward Index

Industry Risk Reward Index

Table: Western Europe Telecoms Risk/Rewards Index, Q315

Market Overview

Mobile

Regional Perspective

Table: Mobile Market Regional Comparisons, 2013

Key Developments

Market Growth

Market Share And Net Additions

Table: Net Additions By Operator ('000)

Subscription Mix

Usage

MVNOs

Networks

O2/E-Plus Merger And Support For New Players

Table: Percentage Of Revenues From Non-Voice Services (%)

Table: Mobile Market Overview

Table: T-Mobile

Table: Vodafone

Table: E-Plus

Table: O2

Mobile Content

Monetising Footfall

Interoperable M-Commerce A Stronger Proposition

Positioning Key To M2M Success

Regaining Control Of The Bill

Fixed Line

Recent Developments

Fixed-Line Telephony

Operator Performance

Table: Fixed-Line Subscriptions By Operator ('000)

Table: Voice Telephony Accesses And Other Licensed Operators' Shares, 2011-2013

Fixed Broadband

Pay-TV/Convergence

Table: TV Households By Platform (mn)

Table: HD TV Households (mn)

Converged Service Operator Data

Table: Deutsche Telekom

Table: Kabel Deutschland

Table: UPC Unitymedia

Table: Telefonica Deutschland

Table: Sky Deutschland

Table: Tele2 Deutschland

Table: 1&1/United Internet

Industry Trends And Developments

Table: Trends And Developments

Regulatory Development

Regulatory Overview

Table: Germany Regulatory Bodies And Their Responsibilities

Regulatory Developments

Competitive Landscape

Table: Key Players - Germany Telecoms Sector

Table: Selected Operators' Financial Indicators, 2008-2013 (USDmn)

Company Profile

Deutsche Telekom

Vodafone Germany

Telefónica Deutschland

Regional Overview

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Germany 1990-2025)

Table: Key Population Ratios (Germany 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Germany 1990-2025)

Table: Population By Age Group (Germany 1990-2025)

Table: Population By Age Group % (Germany 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

## I would like to order

Product name: Germany Telecommunications Report Q3 2015

Product link: <https://marketpublishers.com/r/GC2EE9B7726EN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/GC2EE9B7726EN.html>