

Netherlands Telecommunications Report Q1 2016

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Abstracts

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BMI View: Convergence and bundling will drive down overall subscription numbers in the Netherlands, implying a saturated market lacking investment opportunities. However, the launch of the first PVNO by CGI and a Dutch utilities company will lead to increased competition in the Netherlands' already thriving M2M market.

Latest Updates & Industry Developments

Mobile subscriptions declined in H115, in line with expectations. We forecast 18.1mn subscriptions by end-2015, falling to 17.5mn in 2019. 3G/4G migration will see such subscriptions rise from 12.257mn to 14.641mn.

Muted demand for low-capacity wireline broadband will impede broadband market growth, but fibre connections will facilitate uptake of high-value triple- and quad-play services. Subscriptions will fall to 7.7mn in 2019, but will yield higher ARPU.

Launch of first PVNO by BroadForward and CGI in collaboration with a Dutch utilities company will lead to increased competition in M2M segment.

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