

Netherlands Telecommunications Report Q2 2016

<https://marketpublishers.com/r/NE324781B12EN.html>

Date: April 2016

Pages: 62

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

ID: NE324781B12EN

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 and devoid of organic subscriber growth. 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 9M15, in line with expectations. We forecast 17.85mn subscriptions by end-2016, falling to 17.41mn in 2020. 3G/4G migration will see subscriptions rise from 12.26mn in 2015 to 14.9mn in 2020.

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 stand at 7.7mn in 2020, 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.

Contents

BMI Industry View

SWOT

Telecoms

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (Netherlands 2013-2020)

Industry Risk Reward Index

Western Europe Telecoms Risk/Reward Index

Table: Western Europe Risk Reward Index

Netherlands Telecoms Risk Reward Index

Market Overview

Market Drivers & Trends

Mobile

Table: Retail Mobile Traffic Indicators

Wireline Voice & Broadband

Table: Netherlands Fixed Telephone Accesses By Product ('000)

Pay-TV/Convergence

Regulatory Development

Table: Netherlands: Regulatory Bodies And Their Responsibilities

Market Analysis

Table: Additional Spectrum Allocations, 2012

Competitive Landscape

Table: Key Players: Netherlands Telecoms Sector

Table: Selected Operators' Financial Indicators, 2010-2014

Mobile Operator Data

Table: Mobile Market Overview

Table: KPN

Table: T-Mobile

Table: Vodafone

Table: Tele

Wireline Operator Data

Table: KPN

Table: UPC/Ziggo

Table: Ziggo (Historical pre-UPC merger)

Table: Tele2

Company Profile

Royal KPN NV

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Netherlands 1990-2025)

Table: Key Population Ratios (Netherlands 1990-2025)

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

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

Table: Population By Age Group% (Netherlands 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

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