

# Netherlands Telecommunications Report Q4 2015

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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. Tele2 and Ziggo's 4G launches show there are ample rewards for industry players. However, a successful mobile service must be married with a strong wireline offering. Thus, Tele2 may be found to be lacking, leaving Ziggo to capitalise on rising demand for mobile- and TV-led converged services.

### Latest Updates and 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.

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