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Norway Telecommunications Report Q2 2016

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Abstracts

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BMI View: The Norwegian mobile market is effectively a duopoly between Telenor and Netcom, and we are sceptical that the efforts of ice.net, through the no-frills segment, and Get, offering convergence as a MVNO, will drastically change the competitive dynamics. The only market where Telenor is not fully dominant (with a market share below 50%) is broadband, especially through fibre, as the main competition comes from a range of smaller providers, driven by municipalities. This fragmentation means it does not have the scale required on a nationwide level to create a strong new player in the market, offering stronger competition for consumers.

Key Data

There were 5.865mn mobile subscribers in Norway in Q315, as the market continues to oscillate between 5.8mn and 5.9mn subscribers, a trend since 2013.

The overall broadband market was in decline between 2014 and H115 according to regulator data, reaching 2.514mn. The fixed market continues to grow with over 2mn customers and fibre gains offsetting DSL losses, but the declining dedicated mobile broadband segment had a greater impact

The fixed voice market continues to decline, reaching 1.029mn in H115, as new players focus on broadband and pay-TV services, and market leader Telenor cannot bundle services to snot bstem its losses

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