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Abstracts

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BMI View: We remain sceptical about the ability of new mobile service providers to change the current structure of Norway's telecommunications market. Although ice.net is targeting the no-frills segment and Get is offering convergence as a MVNO, the market is remains effectively a duopoly between Telenor and Telia-Sonera-backed Netcom. The only sector where Telenor is not fully dominant (with a market share below 50%) is broadband, especially in the provision of optical fibre services. In this sector, Telenor's main competition comes from a range of smaller providers, driven by municipalities. Fragmentation in the broadband sector means that it lacks an additional strong national service provider, the presence of which would offer greater competition and more choice for consumers.

Latest Updates & Industry Developments

> There were 5.802mn mobile subscribers in Norway in Q116, as the market continues to oscillate between 5.8mn and 5.9mn subscribers, a trend that has continued since 2013.

> The overall broadband market was in decline between 2014 and H115 (latest available data at the time of writing) 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 as market leader Telenor cannot bundle services to snot bstem its losses.

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