

Portugal Telecommunications Report Q1 2016

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Abstracts

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BMI View: The Portuguese market is mature and exhibits volatile growth. Market saturation, low discretionary spending and high prepaid subscribers all contribute towards a telecom industry outlook that is far from optimistic. However, changed ownership for all key players bar Vodafone suggests that more rational investment strategies will lead to the development of more advanced services. This will be a boon to the weak consumer market, but the surviving operators will need to be leaner and fitter to survive the changing market dynamics.

Latest Updates and Industry Developments

Mobile subscriptions declined in 9M15, in line with expectations. We forecast 16.788mn subscriptions by end-2015, rising to 16.889mn in 2019 as 3G/4G migration accelerates. There will be 7.421mn 3G/4G subscriptions by 2019.

Operator consolidation and altered ownership structures will focus investment on next-generation platforms, facilitating uptake of high-value triple- and quad-play services. Broadband subscriptions will reach 3.938mn in 2019, but will yield lower average revenue per user (ARPU) as a result of bundling.

Contents

BMI Industry View

SWOT

Industry SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (Portugal 2012-2019)

Industry Risk/Reward Index

Western Europe- Western Europe Telecoms Risk/Reward Index

Table: Western Europe Risk/Reward Index

Market Overview

Mobile

Table: Mobile Subscriptions By Type ('000), 2013-2015

Wireline Voice & Broadband

Table: Growth of Fixed Line Accesses ('000), 2014-2015

Table: Broadband Accesses By Technology ('000), 2014-2015

Pay-TV & Convergence

Table: Pay TV RGUs by Platform (000) 2013-2015

Table: Bundled Subscriptions By Product Mix ('000), 2014-2015

Regulatory Development

Table: Portugal - Regulatory Bodies And Their Responsibilities

Competitive Landscape

Mobile Operator Data

Table: Portugal Mobile Market Overview

Table: Portugal Telecom/MEO

Table: Vodafone Portugal

Table: Nos

Company Profile

Nos

Portugal Telecom

Vodafone Portugal

Demographic Forecast

Table: Population Headline Indicators (Portugal 1990-2025)

Table: Key Population Ratios (Portugal 1990-2025)

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

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

Table: Population By Age Group % (Portugal 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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