

# 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.

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