

Portugal Telecommunications Report Q4 2015

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Abstracts

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BMI View: The Portuguese mobile market is mature and exhibits volatile growth due to saturation effects and multi-service bundling. Compounding this is the fact that the costs of fibre optic cables are very high and limit the capabilities of wireline broadband. Market saturation, low GDP and discretionary spending limits and high postpaid subscribers all contribute towards a telecoms industry outlook that is far from optimistic. That said, the sale of Portugal Telecom to Altice and the likely sale of the latter's surplus cable broadband units to Vodafone suggest that a change of strategy will emerge in the next 12-18 months. 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.

Key Data:

Wireline voice accesses are forecast to decline from 4.582mn in 2014 to 4.402mn by 2019 as more consumers switch to mobiles or IP-based substitutes.

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