

Switzerland Telecommunications Report Q3 2015

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Abstracts

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BMI View: The maturity of the Swiss telecoms market means there are severely diminished opportunities for subscription growth; however, the country's high per capita incomes and strong demand for the latest technologies means it continues to be one of the most lucrative markets in Europe. The lucrative nature of the market is reflected in the large investments made by operators in infrastructure, with the incumbent Swisscom investing aggressively in fibre and LTE since 2012. It has also resulted in acquisitions in the Swiss market, for instance NJJ was cleared to acquire Orange in early 2015, while Sunrise announced its intention to IP.

Key Data

Smartphone ownership has proliferated rapidly in Switzerland, with Swisscom reporting smartphone penetration in excess of 70% of its subscription base in 2014.

Average revenue per user (ARPU) levels continued to decline, a trend primarily attributed to a fall in mobile telephony prices in 2013 and 2014 following the launch of Swisscom's Infinity tariffs and erosion of traditional revenue sources such as SMS.

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