

# **Belgium - Telecommunication Services: A mature market supported by regulatory and operator initiatives which increases attractiveness (Strategy, Performance and Risk Analysis)**

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## **Abstracts**

Belgium - Telecommunication Services: A mature market supported by regulatory and operator initiatives which increases attractiveness (Strategy, Performance and Risk Analysis)

### **SUMMARY**

Although fixed revenue dominated the Belgium market in 2016, revenue is expected to be skewed towards the mobile segment over the forecast period. During this time, mobile growth will be driven by growing mobile data revenue, following the uplift of data usage and data revenue which stems from LTE adoption. Mobile subscriptions increased at a CAGR of 3.9% during 2012-2016 and are expected to increase at a CAGR of 5.9% over 2016-2021. Mobile user penetration (as % of population) was at 81.6% in 2016, and is expected to increase to 87.8% by 2021.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

### **KEY HIGHLIGHTS**

#### **SCOPE FOR BROADBAND PENETRATION DESPITE SATURATED MOBILE MARKET**

Belgium, with existing and expected mobile subscriptions of 15.2 million and 20.2 million in 2016 and 2021 respectively, and penetration levels of 133.3% in 2016 (subscription as % of population), is quite saturated. Increasing adoption of Long Term Evolution (LTE) enabled devices has led to the increase in mobile data usage, evidenced by LTE subscriptions increasing at a CAGR of 181.6% during 2012-2016. Orange Belgium also plans to roll out voice-over-LTE (VoLTE) and Wi-Fi Calling across Belgium in 2017.

#### Increase in fixed internet accounts - VoIP and broadband

Since the mobile market is quite saturated, telecom operators have focused on the fixed line market. Innovation in technology has made VoIP more affordable, leading VoIP subscriptions to increase at 5.0% CAGR from 1.5 million in 2012 to 1.8 million in 2016 and is expected to increase at 4.1% CAGR over 2016-2021 to reach 2.3 million. Moreover, government initiatives to develop fixed technologies such as fiber, vectoring and DOCSIS 3.1 have led broadband subscriptions to increase at 3.3% CAGR from 3.7 million in 2012 to 4.2 million in 2016 and are expected to increase at 1.8% CAGR to reach 4.6 million by 2021.

#### Fixed business internet and IPTV to take charge

Internet services and IPTV are expected to drive fixed business revenue and, similar to fixed residential revenue, newer technology and internet based communication channels are expected to adversely affect business voice revenue.

## SCOPE

**Risk/Reward Index** - enables you to assess the risks and potential rewards of investing in the Belgium Telecommunications market in comparison with other European countries.

**Industry Snapshot and Industry View** - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Belgium Telecommunications market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Belgium Telecommunications market.

Industry Benchmarking - Benchmark how the Belgium Telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Belgium Telecommunications market by business segment on metrics such as such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

Have technological advances drastically changed the face of the Telecommunications industry?

How is the market performing in terms of: Revenues, Subscribers, ARPU, and Customer Churn?

How risky is it to invest in the Belgium Telecommunications industry compared to other European countries?

What is driving the performance of key industry segments such as Voice, Data, Prepaid, Postpaid, Broadband, and IPTV?

Who are the leading players in the Belgium Telecommunications industry and how does their performance compare?

What trends are being witnessed within the Belgium Telecommunications industry?

How will the breakdown for mobile connection technologies look by 2021?

What are the Belgium Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How has the financial deals landscape changed in 2015 and 2016?

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