

# **The Netherlands - Telecommunication Services: Strong market adaptable to technological innovation (Strategy, Performance and Risk Analysis)**

<https://marketpublishers.com/r/NAD8290BCB2EN.html>

Date: June 2017

Pages: 75

Price: US\$ 1,995.00 (Single User License)

ID: NAD8290BCB2EN

## **Abstracts**

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### **SUMMARY**

This report offers an in depth analysis of the Dutch telecommunication market, exploring current and forecast trends of the market's segments, an overview of key developments and a comparative look into the growth of the industry. In terms of innovation, the telecom market in the Netherlands is considered strong, with ample opportunity for business and investments. Readers can find further information detailing the Dutch telecom's key strengths and weaknesses, along with much more, in the report.

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**

Decreasing voice revenue: a major concern

Low-tariff strategies by operators in a bid to gain market shares and increase the demand for data/internet services, such as Pay-TV, has led to the decline in voice revenue.

Voice revenue has decreased at 8.5% CAGR for 2012-16 from US\$2,006.7 million in 2012 to US\$1,404.8 million in 2016, and is expected to further decrease at 0.3% CAGR for 2016-21 to US\$1,383.0 million in 2021. Data and internet accounts for over 59% of total telecom revenue in 2016 and is expected to account for 66% share by 2021.

### Operators consolidating their operations

The fall in revenue, especially in the voice segment, has led companies to consolidate their operations to obtain higher levels of synergy. The merger of UPC with Ziggo and the 50:50 joint venture between Ziggo and Vodafone Netherlands are examples of this consolidation.

### Broadband penetration boosted by fiber networks

Fixed voice and broadband penetration has seen consistent growth in the last few years. Fixed voice subscriptions increased at 1.4% CAGR, from 6.9 million in 2012 to 7.3 million in 2016, and are expected to increase at 1.3% CAGR, to 7.8 million in 2021. The trend is expected to continue, with penetration reaching 44% in 2021. Broadband subscriptions increased at 2.4% CAGR, from 6.6 million in 2012 to 7.3 million in 2016 and are expected to increase at 1.3% CAGR, to 7.8 million in 2021.

VoIP subscriptions increased at 8.7% CAGR for 2012-16 from 4.1 million in 2012 to 6.1 million in 2016, and are expected to increase at 3.82% CAGR during 2016-21 to 7.4 million in 2021.

## SCOPE

**Risk/Reward Index** - enables you to assess the risks and potential rewards of investing in the Dutch 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 that drive market performance in the Dutch telecommunications market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the Dutch

telecommunications market.

**Industry Benchmarking** - Benchmark how the Dutch telecommunications market is performing compared to the 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 Dutch telecommunications market through the business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

What is the market performance with regards to revenues, subscribers, ARPU, and customer churn?

What do high penetration levels and low churn rates mean for the Dutch telecom market, and how are operators responding to this?

An overview of the key developments made over the review period, and the entities involved?

What are the strengths and weaknesses of the Dutch telecom market; what are the opportunities and challenges that it faces?

Who are the key players in the market and how has a highly competitive landscape effected the Dutch telecom market?

How are technological advancements supporting growth in the segment?

What are the primary drivers of the market in terms of the market segments: data, prepaid, postpaid, broadband, and IPTV segments?

What changes have been recorded in the financial deals landscape over 2015 to 2016?

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