Germany - Mobile Infrastructure, Broadband, Operators - Statistics and Analyses

Description: The German mobile market is the largest in Europe, with about 118 million subscribers generating the largest revenue in the telecom sector. In common with most markets the main area of growth is in mobile data, with the number of mobile broadband subscribers having increased rapidly in recent years on the back of extensively available 3G and LTE networks. The market is dominated by Telekom Deutschland and Vodafone Germany, though the acquisition of E-Plus by Telefónica has effectively created a triopoly of MNOs with relatively similar market share among them. There is also healthy market competition from an increasing number of resellers. This has placed pressure on voice and data tariffs, resulting in lower ARPU. Regulatory pressure on roaming charges and mobile termination rates have also eroded operator revenue, and encouraged them to step-up their development of data applications to improve profits.

These investments provide enormous potential for future growth, particularly given recent spectrum auctions which enable operators to improve the reach and capabilities of their LTE networks. As well as having refarmed digital dividend spectrum for mobile broadband use, the regulator auctioned additional spectrum in the 700MHz band in June 2015, paving the way for national mobile broadband coverage when this spectrum becomes available from 2017.

This report provides key statistics and analyses on the mobile market, including an overview of the main operators and their strategies for dealing with competition and emerging technologies in coming years. The report also considers recent regulatory developments.

Key developments:
Telekom Deutschland trials tri-band LTE-A technology, also LTE-Vehicle technologies with Huawei; regulator secures 5 billion from multi-band auction; Telefónica completes acquisition of E-Plus and discontinues the brand; TD launches Wi-Fi calling for VoLTE users; Vodafone increases LTE speeds to 375Mb/s; Freenet acquires Media Broadcast to branch into linear and OTT TV services; universal broadband dependant on licence conditions concerned with rural areas; Vodafone and O2 report strong growth in LTE customer base; Vodafone completes its 7.7 billion takeover of Kabel Deutschland; report update includes the regulator's market data for 2014, VATM's 2015 market data, telcos' operating and financial data to Q1 2016, recent market developments.

Companies mentioned in this report: Telekom Deutschland, Vodafone, E-Plus, O2, Freenet, CallMobile.

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