Western Europe Telecoms Market: Interim Forecast Update (16 Countries) 2016–2021

Description: "Telecoms retail revenue decline in Western Europe will be slower than in previous years, falling at a CAGR of ~0.5% between 2016 and 2021."

Slower revenue decline in Western Europe is a result of increasing take-up of 4G technology-based services and next-generation access (NGA) fixed broadband services. Fast, reliable and generating more revenue, fixed broadband (FBB) connections and mobile data services will help to offset declining traditional voice revenue and become key revenue contributors by 2021.

This report and data annex provide:

- a full update of our 5-year forecast of 345 mobile and fixed key performance indicators (KPIs) for Western Europe as a whole and for 16 individual countries
- an explanation of the key drivers and assumptions that underpin the forecasts, along with discussion of the implications for fixed and mobile operators
- an explanation of the significant changes to our previous forecasts for the region.

Regions modelled
- Western Europe (WE)

Countries modelled individually
- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Greece
- Ireland
- Italy
- Netherlands
- Norway
- Portugal
- Spain
- Sweden
- Switzerland
- UK

Connections

Mobile
- Handset, mobile broadband, IoT
- Prepaid, contract
- 2G, 3G, 4G, 5G
- Smartphone, non-smartphone

Fixed
- Voice, broadband, IPTV, dial-up
- Narrowband voice, VoBB
- DSL, FTTP/B, cable, BFWA, other
Fixed and mobile voice traffic
- Outgoing minutes, MoU

Revenue

Mobile
- Service, retail
- Prepaid, contract
- Handset, mobile broadband, IoT
- Handset voice, messaging, data

Fixed
- Service, retail
- Voice, broadband, IPTV, dial-up, BNS
- DSL, FTTP/B, cable, BFWA, other

Mobile ARPU
- SIMs, handset
- Prepaid, contract
- Handset voice, data

Contents:
- Executive summary and regional forecasts
- Total telecoms revenue growth in Western Europe will continue to decline between 2016 and 2021 but at a slower pace
- Smartphones and 4G/5G: Smartphones will account for 93% of handsets and 4G/5G penetration will reach 84% by 2021
- Fixed services: NGA connections will account for 73% of the total broadband lines and VDSL will be the leading access technology in 2021
- Key regional changes since our previous forecast: FBB revenue will increase more quickly than expected driven by NGA service take-up
- Forecast revision: Overall telecoms retail revenue decline will be slower than expected because of fixed broadband and IPTV revenue growth
- Individual country forecasts
- Finance: Increasing demand for multi-play services drive further investments in NGA networks
- Germany: Historical data revisions are the main reason behind forecast adjustments
- Italy: Fixed and mobile voice revenue will decline faster due to OTT substitution and generous voice allowances
- Spain: We expect faster fixed broadband revenue growth due to slower decline in fibre ARPU and higher IPTV spending
- UK: Service revenue will remain largely flat, but technological evolution will continue more quickly than expected
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