

Germany Telecoms, Mobile, Broadband and Digital Media Market 2017 - Market Statistics, Trends, Opportunities and Growth

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Executive Summary

German telecom sector ambitious for gigabit society by 2025

Germany has one of Europe’s largest telecom markets, as befits a country with a population of more than 82 million. Penetration in the broadband and mobile sectors is about average for the region. Both the fixed network and broadband markets are dominated by Telekom Deutschland, though other notable players including freenet, Vodafone and Telefónica. These altnets have gained market share as the incumbent continues to struggle against regulated network access conditions and market competition, both of which have led to declining revenue during the last few years.

The number of mobile subscribers approaches 114 million. In common with most developed markets, the main driver for growth is in mobile data, with the number of mobile broadband subscribers having increased rapidly in recent years on the back of universally available 3G infrastructure and the extensive reach of LTE networks. Operators have invested in MIMO and carrier aggregation technologies to provide improved data rates. Looking forward, there is also increasing activity in 5G, with Deutsche Telekom in February 2017 announcing its intention to provide 5G across its networks from 2020.

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This report introduces the key aspects of the German telecom market, providing data on the country’s fixed network infrastructure as well as key regulatory developments including the status of



interconnection, local loop unbundling, number portability, and carrier preselection. It also profiles the major operators, and details the development of Next Generation Networks and issues relating to NGN access.

The report also covers the mobile voice, data and broadband markets, including an overview of regulatory developments and an evaluation of the main operators and their strategies for dealing with competition and emerging technologies in coming years. In addition the report profiles Germany's fixed and wireless broadband markets, together with forecasts to 2021 and an analysis of developments with related technologies such as FttP, powerline broadband, wireless broadband, Wi-Fi and internet via satellite.

Key developments:

- Regulator decides on future bitstream access requirements;
- Telecom market revenue showing continued decline;
- EWE to invest more than €1 billion in fibre-based infrastructure to 2026;
- Industry pressure to develop a gigabit society by 2025;
- Government progresses with Digital Agenda 2014 - 2017 program to expand broadband services nationally by 2018;
- Telekom Deutschland expands vectoring VDSL;
- Unitymedia to launch 1Gb/s service based on the DOCSIS3.1 later in 2017;
- Vodafone Germany launches cloud-based GigaTV service;
- Unitymedia makes Netflix available as an app on its Horizon TV platform;
- Unitymedia to shut down analogue TV services in June 2017;
- Telekom Deutschland launches NB-IoT network;
- Vodafone Germany increases LTE speeds to 500Mb/s;
- O2 reports having over 12 million LTE customers;
- Deutsche Telekom commits to 5G across its network footprint;
- Report update includes the regulator's market data for 2015, VATM's 2016 market data, telcos' operating and financial data to Q4 2016, recent market developments.

Companies mentioned in this report:

Telekom Deutschland, Deutsche Telekom, freenet, Tele2 Germany, Telefónica Germany (O2 Germany), Vodafone Germany, E-Plus, CallMobile, United Internet, Tiscali, QSC, Kabel BW, Kabel Deutschland, Unitymedia, PrimaCom, The Cloud, Energie Baden-Wurttemberg, Sky Deutschland.

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