Telecommunications Groups - Europe

Market Analysis – 2015-2020 Trends – Corporate Strategies

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Exclusive extracts from this 250 page-long report:

- What is the business?

The telecommunications industry can be divided between equipment and services. Telecom equipment includes mobile phones, network equipment and other new areas (i.e. cable TV). Telecommunications carriers, also known as telecom operators or service providers, are the main customers of equipment manufacturers.

- Who are the key players?

On a global basis, the telecommunications sector is fairly fragmented with at least forty large telecommunications operators. This fragmentation is particularly strong in the European market. Consolidation is high at a national level, with three to five large providers in each country on average. Furthermore, consolidation at a regional level is trending up and large groups such as Vodafone and Telefonica are expanding their operations on a global basis [...]
Companies analysed in the report include: **DEUTSCHE TELEKOM, VODAFONE, TELEFONICA, ORANGE, BT GROUP, TELECOM ITALIA, LIBERTY GLOBAL, TELENOR, TELIASONERA, KPN, THREE GROUP EUROPE, ILIAD, ALTICE and CK HUTCHINSON.**

- How intense is competition?

The telecommunications industry is highly competitive, with many alternative providers. In each country there are typically at least three to four operators, and across Europe there are more than 100 mobile network operators. Consumers' appetite for mobile data and more services is growing rapidly in Europe. As a result, IP communications services such as Facebook Messenger, WhatsApp and Skype are becoming more popular. These services will continue to gain traction with the growth of 4G networks and devices, meaning operators will need to consider which type of partnership or over-the-air integration models will allow them to drive revenue and sustain their business models in the longer term.

- What are the main markets?

In spite of having less population than Asia or North America, Europe is one of the regions with the largest number of mobile subscriptions due to its high degree of economic maturity and the key importance of telecommunications in this market. In 2014 Europe had a total of 680 million active mobile subscriptions, with Germany and Italy standing as the countries with the largest number of active lines (110.2 and 96.2 million respectively). To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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