

# Czech Republic Telecommunications Report Q4 2016

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## Abstracts

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**BMI View:** Mobile broadband services are currently driving the Czech telecoms market. Wireline investments in fibre and xDSL are continuing, but with operators facing strong competition from mobile IP services, there is little inclination to invest heavily. However, there are limits to customers' willingness to pay a premium for non-voice services. Success will come from innovations in the way operators package services. Multi-play and convergence will be key to ensuring attractive returns on investment.

### Latest Updates & Industry Developments

Flat mobile subscription growth was seen in Q116: the market can no longer support organic growth strategies and operators must look to deepen their relationships with existing customers. 3G/4G migration will help: we forecast 3G/4G subscribers to account for two-thirds of the overall mobile market by 2020.

Technology upgrades will ensure wireline broadband growth continues, but fixed-mobile LTE offerings will make such services seem less attractive to potential subscribers. We forecast 5.095mn wireline and dedicated mobile broadband subscriptions by 2020.

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Czech Republic RRI

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