Austria Telecommunications Report 2010

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Abstracts

In our Austria Telecommunications Report for 2010 we have revised our forecasts for the mobile, broadband and fixed-line sectors, and extended our forecast period to 2014. This report comes against the aftermath of a deep economic recession in the eurozone, which slowed the region's economies for much of 2009 and continues to weigh heavily on certain markets in 2010. Austria's telecoms market is strongly characterised by demand for advanced services but, apart from a contraction in earnings (caused by a change in mobile roaming fees), which fed through to operators' ARPUs and bottom line financial results, does not appear to have impacted unduly on the market at large. In our last update, we were confident that the Austrian telecoms market would weather the storm, and this view appears to have prevailed (the lack of certain Q409 data notwithstanding).

Mobile sector growth continued throughout 2009, taking the country's mobile subscriber base over the 11mn mark and representing mobile penetration of 136%. A lot of this growth is being driven by the postpaid segment and there is strong demand for mobile broadband services which, according to the regulator, RTR, accounted for 39.2% of the country's broadband market in Q309 and ought to have passed 42% by the end of 2009. The number of 3G SIMs continued to grow strongly through the first nine months of 2009 (latest data available), as some operators now issue 3G SIMs to users even if they only use 2G services.

Mobile market leader mobilkom austria continued to dominate the net additions market during 2009, accounting for 46% of all new subscribers during the year. Its nearest rival in terms of net additions is 3 Austria, the country's smallest mobile operator. During 2009, 3 Austria accounted for 30% of new subscribers as it chased the low-cost mass-market segment. Its average revenue per user (ARPU) dropped significantly in 2009, although it was the only operator to see positive revenue and profit growth for the year. T-Mobile Austria and Orange Austria did less well, although T-Mobile has been

concentrating on migrating prepaid users to postpaid plans. With operators deploying HSPA+ and trialling 4G technologies such as LTE, it is clear that they expect future growth to be driven by high-speed mobile broadband services. As yet, though, there is no indication from the regulator as to when 4G licences will be issued. For now, our mobile subscriber forecasts are driven by 3G uptake. By 2014, we expect there will be 7.781mn 3G subscribers, or 59.5% of the overall mobile user base of 13.089mn.

The broadband sector was a veritable engine of growth in 2009, with subscriber numbers rising by 20.6% in the year to September 2009 (latest data). We believe broadband subscriber numbers hit 3.1mn by the end of 2009, or a penetration rate of 37%. By 2014, we forecast that broadband customer numbers will reach 3.8mn, of which mobile broadband services could easily account for at least two-thirds. The continued upgrade and expansion of broadband services and networks, as well as intense competition, is expected to drive robust broadband growth for several years.

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