

Bosnia and Herzegovina Telecommunications Report

Q2 2015

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Abstracts

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BMI View: Quarterly growth on the Bosnian mobile market remained flat in Q214, despite a relatively low penetration rate, owing to sluggish economic growth and discounting of inactive SIM cards. However, a considerable proportion of the population still do not have regular access to mobile services, a situation we attribute to poor network coverage in underserved areas and the inability of low income earners in these areas to afford the service. With the uptake of 3G and multiplay services in urban areas, the operators are less inclined to embark on expensive and less rewarding network deployment projects in rural areas. We expect this to weigh on mobile subscriptions growth over our forecast period, through to 2018, with the penetration rate remaining below 100%.

Key Data

The mobile market was flat at 0.4% quarter-on-quarter (q-o-q) in Q214, as penetration declined to 88.1%.

The latest regulatory data show that the total number of active fixed telephone lines of dominant operators was almost flat quarter on quarter with 0.01% growth at 869,309. We estimate that the broadband market grew by 11.4% year-on-year (y-o-y) in 2013, driven by rising demand for mobile data and cable broadband connections.

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