

Bosnia-Herzegovina Telecommunications Report Q1 2012

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Abstracts

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BMI's Q1 2012 report on the telecoms market of Bosnia & Herzegovina includes analyses of the country's mobile, fixed-line and broadband subscriber markets. It also forecasts growth in the number of internet users and analyses specific internet usage trends. The report contains five-year growth forecasts that chart how the country's different telecommunications sectors are likely to develop. Our five-year forecasts are based on the most recent available figures to be published by Bosnia's telecoms regulator, the International Telecommunications Union (ITU) and by the country's leading network operators. This quarter we have extended our forecasts to the end of 2016. In addition to our five-year growth forecasts for the mobile, fixed-line and internet markets, we have updated our ARPU forecasts for the mobile market.

The Bosnian market is demarcated into three distinct historical concession areas for the three incumbent telecoms operators. The country is split into two distinct political regions, the Federation of Bosnia & Herzegovina (FBiH) and the Republika Srpska. BH Telecom remains the largest operator across all segments and has the largest historical concession area, in the FBiH. Telekom Srpske is the second largest operator and is responsible for the second largest region, the Republika Srpska. Meanwhile, HT Mostar is the smallest incumbent operator and is active in Herzegovina and is the smallest of the three.

BMI calculates that the Bosnian mobile market grew by 3.0% q-o-q in the second quarter of 2011, with the number of mobile subscribers increasing to 3.56mn. Our calculations depict stronger growth in Q211 compared with the two previous quarters. The accelerated growth appears to reflect the acquisition of large numbers of prepaid

users by BH Telecom. Bosnia's largest mobile operator by subscribers reportedly had 1.35mn active prepaid users at the end of June. Meanwhile, figures reported by Telekom Srbija, the parent company of Telekom Srpske, suggest that the operator experienced a shrinking customer base in H111, a development which was most likely due to the deduction of inactive prepaid users from its overall customer base.

Although we predict continued growth for Bosnia's mobile market, we caution that the market could experience further moves by the operators to discount inactive SIMs. We expect annual growth to average at 4.4% for most part of our forecast period, with mobile penetration reaching 107% in 2012 and 124% in 2016. Meanwhile, we believe higher value services especially mobile data and postpaid subscriptions will be major growth drivers as operators attempt to capitalise on the improved outlook for economic growth. The operators entered distribution agreements with high-end device manufacturers, including Apple, HTC and Research In Motion. This will help offset the impact of competition and promotional activities on ARPUs in the basic voice segment.

We have made some slight changes to our forecast for Bosnia's fixed-line sector. Our forecast revisions reflect new regulatory figure for the number of fixed-line connections at the end of 2010. According to the regulator, the number of fixed-lines grew by 4.4% in 2010 to reach 990,000 at the end of the year. BMI believes that this growth was based on several strategies being pursued by the operators including the promotion of bundled service packages and the use of new pricing structures. We believe that the continuation of these strategies helped to sustain moderate fixed-line growth in 2011. Meanwhile, the introduction of fixed number portability in the second half of the year is thought to have had a favourable impact on the sector, allowing customers to switch operators while signing up to new contracts. Although further growth is anticipated for 2012, we expect the sector to return to negative growth in the latter part of our forecast. Our new long-term forecast envisages the fixed sector shrinking to about 980,000 in 2016, equivalent to a penetration at 26.5%.

BMI estimates that Bosnia's broadband sector continued to show strong growth in 2011, expanding by over 21% in the twelve months to 31 December. Weaker economic growth is expected to produce slower growth for the broadband sector in 2012. Over the coming year, we predict that Bosnia's broadband subscriber base will increase by almost 12%, with penetration expected to rise to 14.3%. Going forward, we expect the increasing availability of advanced services such as IPTV to help maintain strong rates of broadband growth. We also expect the promotion of triple-play service packages to have a favourable impact on growth. By the end of 2016 we expect a broadband

subscriber base of almost 680,000 customers. This is equivalent to a penetration rate of over 18%.

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