

Bosnia-Herzegovina Telecommunications Report Q4 2011

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Abstracts

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The BMI Q411 report on the telecoms market in Bosnia & Herzegovina includes analyses of the country's mobile, fixed-line and broadband subscriber markets. It also depicts 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. In addition to our fiveyear 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 0.9% q-o-q during Q111 to 3.412mn subscribers. This is considerably slower than the two previous quarters when growth exceeded 2%. We believe the slowdown reflects increasing saturation of the mobile market, with the penetration rate pushing towards 100% and the continuous

discounting of inactive SIMs by the country's mobile operators. We expect annual growth to remain above 4% for most part of our forecast period, with mobile penetration reaching 95% in 2011 and 113% in 2015. 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 ARPU in the basic voice segment.

BMI revised the growth forecast for the fixed-line sector considering new pricing strategies by the operators aimed at reducing churn and the implementation of fixed number portability. During H111, operators introduced new pricing strategies such as flat-rate tariffs and on-net and off-peak discount rates. We expect this to increase demand for fixed lines in Bosnia. Meanwhile, we believe full implementation of number portability will have a considerable impact on subscriptions as it will allow discontented customers of a particular service provider to port their number to a different provider, instead of disconnecting their service. We believe this, along with increased product bundling would slow the rate of decline of fixed subscriptions in Bosnia. Therefore, we revised up our fixed-line forecast and expect fixed-line penetration to remain above 25% by 2015.

Bosnia's regulator has taken steps to encourage fair competition between the incumbents and the alternative operators in the fixed voice and broadband sectors. No outstanding progress has been made, as the incumbents seem keen to maintain market dominance. Although wireline competition remains limited, Bosnia's broadband sector continued to grow rapidly, with xDSL technologies being the main growth driver. This is encouraging development of advanced data services, such as IPTV. Meanwhile, we revised up our internet penetration forecast to reflect recent regulatory data which showed that internet penetration exceeded 51% by the end of 2010. We expect internet and broadband penetration rates in Bosnia to reach 68.4% and 17.6% respectively by 2015.

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