

# Bulgaria Telecommunications Report Q2 2016

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## Abstracts

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BMI View: Mobitel's acquisition of Blizoo further boosts the competition between Mobitel and incumbent Vivacom. This will benefit consumers with the introduction of a wider range of services over faster networks. Third player Telenor will have to become more dynamic. We see no real opportunities for the new fourth mobile network operator, Max Telecom.

### Latest Updates & Industry Developments

Mobile subscription growth will steadily slow over the 2016-2020 period as market saturation offers fewer organic customer addition opportunities; rather, there will be a slow improvement in subscriber mix, in favour of postpaid services.

This will be linked to the growing trend for bundled products as leading operators offer triple- and quadruple-play services. However, bundling will be ARPU-dilutive and BMI forecasts mobile ARPU will be largely unchanged by 2020, at BGN15.83.

The broadband sector will undergo significant growth over the forecast period, driven by strong demand for high-speed data services and consolidation of the fragmented wireline market.

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