

# Croatia Telecommunications Report Q1 2016

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## Abstracts

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**BMI View:** We have revised our forecasts for the Croatian mobile market in our Q1 2016 report update. The Croatian market grew stronger than anticipated in 9M15 and Tele2 and Vip-Net have both committed to significant network upgrades. Vip-Net invested EUR18.6mn in securing two further blocks of 4G spectrum in Q415 and Tele2 is expanding its 3G data service to 97% of the country whilst launching 4G services in Q1 2016. We believe this will result in higher competition and could lead to a price war in the 4G segment. We believe operators will focus on migrating prepaid customers onto higher-value postpaid packages and this will be the growth area over the course of our forecast period.

## Latest Updates & Industry Developments

The mobile market added a total of 274,000 new subscribers in Q215 and Q315 to bring the total number of subscribers to 5.013mn.

Tele2 is aggressively investing in network upgrades by expanding 3G coverage to 97% of the population, expanding voice service to 99% of the country and rolling out 4G in Q1 2016.

Vip-Net is gearing up for 4G competition as the operator spent EUR18.6mn in Q415 to strengthen its 4G capabilities by acquiring two blocks of 4G spectrum.

## Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT Analysis

SWOT

Industry Forecast

Wireline Voice & Broadband

Table: Telecoms Sector - Historical Data & Forecasts (Croatia 2012-2019)

Industry Risk/Reward Ratings

Table: Central And Eastern Europe Telecoms Risk/Rewards Index, Q1 2016

Market Overview

Mobile

Regional Perspective

Table: Mobile Market Regional Comparisons, 2014

Recent Developments

Mobile Growth

Subscription Mix

Broadband

Market Shares

IPTV

Wireline

Regulatory Development

Table: Croatia - Regulatory Bodies And Their Responsibilities

Industry Developments

Competitive Landscape

Table: Key Players - Croatia Telecoms Sector

Table: Croatia Mobile Market Overview 2014-2015

Table: T Mobile HK Overview 2013-2015

Table: VIP Net Overview 2013-2015

Table: Tele2 Overview 2013-2015

Company Profile

T-Hrvatski Telekom

Tele2 Croatia

Demographic Forecast

Table: Population Headline Indicators (Croatia 1990-2025)

Table: Key Population Ratios (Croatia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Croatia 1990-2025)

Table: Population By Age Group (Croatia 1990-2025)

Table: Population By Age Group % (Croatia 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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