

# Croatia Telecommunications Report Q2 2016

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## Abstracts

**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 VIPNet have both committed to significant network upgrades. VIPNet invested EUR18.6mn in securing two further blocks of 4G spectrum in Q415. Tele2 launched its 4G network in February 2016 boosting 4G coverage to 90% of the population. 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 invested 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.

VIPNet 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.

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