

Croatia Telecommunications Report Q3 2016

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Abstracts

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BMI View: We have once again revised our forecasts for the Croatian mobile market to reflect a significant loss of mobile connections in Q415 and Q116. Nevertheless, we believe that this trend was due to the deduction of inactive customers and continue to hold an upbeat view of the development of the sector. Both Tele2 and VIPNet have 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 predict that this will result in higher competition and could lead to a price war in the 4G segment. We also expect the 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 experienced a net loss of 261,000 new subscribers in Q415 and a further 53,000 in Q116 to bring the total number of subscribers to 4.698mn.

Last quarter we upgraded our Croatian forecasts for the 3G/4G mobile market and we now anticipate a total of 1.77mm subscribers by the end of 2016 and 2.77mn subscribers in 2020.

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. Meanwhile, 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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