

# Greece Telecommunications Report Q2 2016

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## Abstracts

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**BMI View:** Our Q2 2016 update on the Greek telecommunications market presents a revised outlook for the country's mobile and fixed-line subscriber sectors. We have also extended all of our forecasts through to 2020. The revised mobile and fixed-line subscriber forecasts are based on a stronger performance for both sectors in 9M15. The Greek mobile market added a healthy 517,000 new subscribers in the first nine months of 2015. Meanwhile, fixed-line connections contracted at a slower rate than we had previously predicted. We remain cautiously optimistic about the Greek market in general. The mobile market is highly saturated and other concerning trends point towards a shift in low-cost prepaid services, meaning consumers are spending less. The three major carriers had launched 4G services by the start of 2015. Operators are expected to put a growing emphasis on the promotion of 3G and 4G subscriptions and services over the next five years as a way of winning and retaining customers and boosting revenue.

### Latest Updates And Industry Developments

Based on evidence of strong subscriber growth in the first nine months of 2015, we now estimate that Greece had 16.242mn mobile subscriptions at the end of the year, up by 4% y-o-y and equating to penetration of more than 148%. We now predict just over 16.8mn mobile subscriptions and a penetration of 155.3% by the end of our new five-year forecast period to 2020.

The primary focus of Greece's three mobile network operators, Cosmote, Vodafone and WIND Hellas, is on the promotion of 3G and 4G LTE services. Customer numbers are expected to rise from approximately 7.59mn in 2015 to just over 8.85mn in 2020.

Using data from Cosmote (formerly OTE) for the first nine months of 2015, we now estimate that Greece had 4.722mn fixed-line subscribers at the end of 2015, down by 1% y-o-y and equivalent to a penetration rate of 43.1%. Similarly, we now We estimate that there were 4.493mn fixed and mobile broadband subscriptions at the end of 2015, up by 8.6% y-o-y. This will rise to 5.09mn by the end of 2020, representing penetration of 47%.

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