

Greece Telecommunications Report Q3 2016

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Abstracts

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BMI View: We retain our core outlook for the Greek telecommunications market in our Q3 2016 report update. Our outlook is based on the stronger performance of the market in 2015, as the mobile market added over 685,000 new subscribers in 2015, a healthy number when compared to the 2014 losses.

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 2015, we now estimate that Greece had 16.242mn mobile subscriptions at the end of the year, up 4.0% 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 2016 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 1.0% y-o-y and equivalent to a penetration rate of 43.1%. Similarly, we now 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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