

Greece Telecommunications Report Q4 2016

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Abstracts

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BMI View: We retain our core outlook for the Greek telecommunications market in our Q4 2016 report update. Our outlook is based on the stronger performance of the market in 2015. The mobile market added 960,000 new subscribers in 2015, a healthy number when compared to the 2014 losses. Early data from 2016 suggest that the market saw modest gains of 62,000 new subscribers in Q116. 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 and Q116, we now estimate that Greece had 16.579mn mobile subscriptions at the end of the first quarter of 2016, up 5.6% y-o-y and equating to penetration of more than 151.3%. We now predict just over 17.09mn mobile subscriptions and a penetration of over 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 8.2mn in 2016 to just over 10.6mn in 2020. By end of 2020, our forecast envisages 3G/4G

penetration rate of over 62%.

Latest data suggest that Greece had approximately 4.74mn fixed line subscribers at the end of 2015. A number we see shrinking to 4.577mn by end of 2020. Similarly, we now estimate that there were 4.712mn fixed and mobile broadband subscriptions at the end of 2015, up by 13.9% y-o-y. This will rise to 5.33mn by the end of 2020.

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