

# Romania Telecommunications Report Q1 2016

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## Abstracts

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**BMI View:** Subscription-led growth is no longer possible in Romania's saturated mobile market. Network operators must deepen their relationships with existing customers, maximising monetisation opportunities. A paucity of high-speed wireline broadband networks was a key driver in 3G uptake, but premium service usage is low, souring investor appetites. Demand for converged services is growing, but Ancom's refusal to allow third parties to access cable operators' networks will impair further development.

### Latest Updates & Industry Developments

Mobile subscriptions increased in 9M15, contrary to expectations. We forecast 27.5mn subscriptions by end-2015, rising to 28.0mn in 2019; variable annual growth will be attributable to ongoing efforts to eliminate inactive subscriptions.

A lack of broadband infrastructure outside major population centres, plus Ancom's reluctance to open the cable broadband networks of RCS&RDS and UPC Romania to third parties will weigh on wireline broadband expansion but will drive uptake of basic 3G mobile broadband services. 3G/4G subscriptions will grow from 18.6mn in 2015 to 25.0mn in 2019.

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