

Romania Telecommunications Report Q3 2016

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Abstracts

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BMI View: We retain our view in our Q316 update that organic subscription-led growth is no longer possible in Romania's saturated mobile market. Network operators must instead 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. Orange Romania's latest foray into converged services is a welcome development and we believe that it could offer the carrier a variety of new revenue streams.

Latest Updates & Industry Developments

Mobile subscriptions increased in 2015, contrary to expectations. We estimate 27.57mn subscriptions at the end of 2015, rising to 28.14mn in 2020; variable annual growth will be attributable to ongoing efforts to eliminate inactive subscriptions.

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