

Slovenia Telecommunications Report 2016

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Abstracts

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BMI View: The Slovenian market has undergone major consolidation measures in 2016 with Si.mobil acquiring Amis and Telemach acquiring Tušmobil. Furthermore, T-2, a fixed line operator remains in receivership and both operators are eyeing its prospective purchase. Furthermore, the sale of state-owned telecoms giant Telekom Slovenia remains incomplete as the government looks to find a buyer. We believe these consolidation measures will lead to heated competition and a quicker uptake of 3G and 4G LTE services. We have revised our 3G and 4G LTE uptake forecast in light of the new consolidation measures and are now forecasting a higher percentage of 3G and 4G enabled phones to penetrate the market quicker. The country's relatively high income levels have led to it having the highest ARPU and postpaid subscription mix in the region, backed by growth in 3G services. The combination of high incomes and strong value-added service uptake means that the rollouts of 4G by the two largest mobile operators should be met with stronger demand than in neighbouring states in the region.

Latest Updates & Industry Developments

The Slovenian telecommunications industry has undergone significant consolidation in 2015 with Austrian owned Si.mobil acquiring fixed line and mobile operator Amis. Furthering the consolidation is Telemach, a Slovenian fixed line operator, buying Tušmobil in 2015. Telemach will be investing heavily into developing 4G LTE capabilities as it anticipates heated competition in the market.

The sale of state-owned giant, Telekom Slovenia has still not gone through with no buyer looking to purchase the majority share from the government in 2015.

The regulator still hopes to find a buyer in 2016 and the introduction of a new, foreign operator will significantly alter the competitive dynamics of the market.

Contents

BMI Industry View

SWOT

Industry Forecast

ARPU

Table: Telecoms Sector - Historical Data & Forecasts (Slovenia 2012-2019)

Industry Risk Reward Ratings

Table: Central And Eastern Europe Telecoms Risk/Rewards Index, Q1 2016

Market Overview

Slovenia Telecom Overview 2016

Market Drivers & Trends

Market Overview

Regulatory Development

Table: Slovenian Regulatory Bodies And Their Responsibilities

Table: Slovenian Regulatory Bodies And Their Responsibilities

Competitive Landscape

Table: Key Players In Slovenia's Telecoms Sector

Table: Slovenia Mobile Market Overview 2012-2015

Table: Telekom Slovenia 2012-2015

Table: Simobil 2012-2015

Table: Tusmobil 2012-2015

Company Profile

Telekom Slovenije

Simobil

Demographic Forecast

Table: Population Headline Indicators (Slovenia 1990-2025)

Table: Key Population Ratios (Slovenia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Slovenia 1990-2025)

Table: Population By Age Group (Slovenia 1990-2025)

Table: Population By Age Group % (Slovenia 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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