

Ukraine Telecommunications Report Q3 2016

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Abstracts

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The mobile market served 61.526mn subscribers at end of Q116, down by 2% y-o-y. We have not made further downward adjustments to our mobile forecasts yet, but will monitor the market in the months ahead before making further revisions.

3G uptake throughout the 2016-2020 period will be strong and will constitute the primary engine of mobile growth in the mobile market. The real opportunities in this segment lie in content and services. BMI View: We maintain our core view that the Ukrainian telecoms market faces significant headwinds, ranging from a collapsing currency, low consumer spending powers, market saturation and an uncertain political climate. We believe that operators hold a significant number of inactive accounts that will be shed in the coming quarters. Furthermore, there is very little room for new organic subscriber growth and we forecast a gradual decrease in total subscriber numbers out to 2020. Growth and revenues to 2020 and beyond will be driven by 3G and advanced data technology uptake as the national mobile market begins to advance and mature in technological terms.

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