

VoIP in CEE Opportunities And Forecast, 2010 - 2015

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Abstracts

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Broadband Network Expansion Drives VoIP Growth In CEE

The telecoms infrastructure in the Central and Eastern Europe (CEE) region has undergone massive transformation over the past decade. Service providers, keen on taking advantage of the region's growing wealth and openness to the outside world, have invested significant resources in the deployment of modern telecoms networks. The transformation, coupled with increasing levels of disposable income, is resulting in the growing demand for more advanced telecoms services, including broadband.

Indeed, CEE is one of the world's fastest growing regions in terms of new broadband subscriber uptake. BMI forecasts show that fixed broadband subscriptions in the region will exceed 115mn by 2015, almost double the estimated number of connections at the end of 2010.

BMI notes that the rapid uptake in broadband services has opened the door of opportunity for various IP-based services. Voice over Internet Protocol (VoIP) is one such opportunity. VoIP is particularly attracting a lot of attention from residential and business broadband users alike because of the significant cost savings it affords them, especially on international calls, compared to rates charged for such calls on traditional wireline and mobile networks. Indeed, the European Union's European Regulators Group (ERG) has welcomed the introduction of VoIP services in the region and is committed to adopting a regulatory approach that will enable the greatest possible level of innovation and competitiveness in the market.

Although most initial VoIP subscriptions were based on fixed broadband access provided by small low-cost operators as well as multi-play offerings from larger cable

network and xDSL service providers, we expect wireless broadband access to play a leading role in future expansion of VoIP services in CEE. With limited expansion of fixed broadband infrastructure expected in the region due to expensive rollout costs, high population levels in rural areas and very difficult topography in some cases, BMI believes that mobile platforms now offer a genuine opportunity to service providers. This view is strongly supported by the rapid deployment of next generation wireless networks, such as WiMAX, in many countries in the region. At the same time, advanced smartphones and other mobile devices, capable of sending and receiving high-speed data communications, are beginning to offer a variety of options in the delivery of VoIP services

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