

Estonia Telecommunications Report 2016

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Abstracts

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BMI View: Estonia's telecoms sector is one of the most developed in the region, particularly with regards to the deployment of advanced next-generation wireline and mobile broadband technologies and services. However, its small geographical size and relatively closed nature means that new entrants have very few opportunities to develop their businesses. Cable broadband operator Starman could become a catalyst for change as it makes strategic acquisitions and augments its service portfolio. Buying 4G licensee GO Network would transform it into a major multi-play service provider and alter market dynamics.

Latest Updates & Industry Developments

Just 10,000 new mobile subscriptions were added in the first nine months of 2015, taking the total to 2.007mn. We forecast 2.016mn by the end of the year. The focus is on 3G/4G migration and customer numbers will reach 1.644mn in 2015 and 2.021mn by 2019.

In the wireline arena, the focus is on rolling out high-speed broadband accesses, over which operators can deliver multiple high-value services. Triple-play services are commonplace, stabilising ARPU's. There will be 643,000 broadband accesses by end-2015, rising to 726,000 by 2019.

Contents

BMI Industry View

SWOT

Industry SWOT

Industry Forecast

Latest Updates

Structural Trends

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

Industry Risk Reward Ratings

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

Market Overview

Market Drivers & Trends

Mobile

Wireline Voice & Broadband

Table: Wireline Accesses By Type

Table: Broadband Subscriptions By Technology ('000)

Pay-TV/Convergence

Table: Cable- And Pay-TV Subscriptions By Operator ('000)

Regulatory Development

Table: Estonia: Regulatory Bodies And Their Responsibilities

Regulatory Developments

Competitive Landscape

Table: Estonia Telecoms Sector - Key Players

Mobile Operator Data

Table: Estonia Mobile Market Overview

Table: Eesti Mobiltelefon (EMT)

Table: Elisa Eesti

Table: Tele2 Eesti

Company Profile

Elion Enterprises/EMT

Tele2 Estonia

Elisa Eesti

Starman

Demographic Forecast

Table: Population Headline Indicators (Estonia 1990-2025)

Table: Key Population Ratios (Estonia 1990-2025)

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

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

Table: Population By Age Group % (Estonia 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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