

Latvia Telecommunications Report 2016

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Abstracts

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BMI View: Although Latvia has one of the most advanced mobile and broadband infrastructure markets, its services sector is less well developed. This is due to a lack of competition: Lattelecom and Baltcom dominate the wireline sector, while LMT and Tele2 dominate the mobile arena. Lattelecom - if it buys LMT - could become a prominent quad-play provider. Baltcom, too, could use its 4G spectrum to follow suit. Or it could buy faltering Bite Latvia. Either way, there is little scope for newcomers to enter and prosper in this small, saturated market.

Latest Updates And Industry Developments

Just 55,000 new mobile subscriptions were added in 9M15, taking the total to 2.853mn. This was in line with expectations and we forecast 2.865mn by year-end. The focus is on 3G/4G migration and customer numbers will reach 2.019mn by 2019.

In the wireline arena, the focus is on rolling out fibre- and DOCSIS 3.0- based high-speed accesses, over which operators can deliver multiple high-value services. Triple-play services are becoming common, but there is little appetite for basic or 'no frills' services outside urban areas. There will be 2.112mn broadband accesses by end-2015, rising to 2.369mn by 2019.

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