Lithuania Telecommunications Report 2015

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Abstracts

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BMI View: Lithuania's mobile market recorded negative growth in 2013 and the for first nine months of 2014, with incumbent Omnitel finally ceding its lead position to Tele2. The mobile market is saturated and as operators move customers to more valuable postpaid plans, so large numbers of inactive prepaid accounts are being eliminated. In Omnitel's case, this has yielded stronger ARPU figures and uncovered underlying positive ARPU growth that had previously not been visible. Consumers have become used to very low monthly mobile bills, however. And, despite an uptick in mobile data consumption, we expect revenues to continue declining over the next five years. The pressure will be on operators to develop advanced new products and services. Not all players will survive the medium term and news that the Bité group is being prepared for sale comes as no surprise.

Key Data

Blended mobile ARPU reached LTL17 at the end of 2014 and we do not project much in the way of recovery until 2018. Nevertheless, the downward trend has stabilised after years of MTR cuts and price competition.

The increased emphasis on postpaid subscriptions will begin to benefit 3G and 4G mobile service revenues. BMI forecasts 3G/4G subscriptions to grow from 1.827mn in 2014 to 2.158mn by 2018 as new handsets and connected devices increasingly come 3G/4G-enabled.

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