

Russian Federation - Telecommunication Services: Mature market with growth opportunities (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Russia is a mature telecoms market, in which the penetration of mobile subscribers increased from 76% in 2012 to 86% in 2016, and is expected to grow to 90% by 2021. Due to high penetration levels in the country, operators are focused on retaining customers by offering value added services. Postpaid subscriptions were the primary driver due to such bundle packages, as well as promotional plans offered by operators. As such, mobile subscriptions increased at a CAGR of 3.8% during 2012-16 from 229.6 million in 2012 to 266.2 million in 2016, and are expected to increase with a CAGR of 1.2% during 2016-21.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

KEY HIGHLIGHTS

Mobile services dominate the total telecom revenue

Increased usage of data for voice calls and proliferation of VoIP based apps are resulting in a decline in mobile voice revenue. Mobile revenue declined at -15.1%

CAGR during 2012-16 from US\$26,999.0 million in 2012 to US\$14,033.4 million in 2016 and expected to increase at 1.8% CAGR during 2016-21 to reach US\$15,330.7 million by 2021.

Subscription penetration levels contributes to top-line

The Russian Federation is a highly technologically advanced country that enables high subscription penetration levels. Mobile subscriptions as penetration of the population increased from 160% in 2012 to 182% in 2016 and is expected to reach 194% by 2021. The increase is attributed to increased investment in the development of LTE and R&D for 5G.

Mergers and Acquisitions

The Russian telecom segment is highly fragmented and has many small players across the country accounting for 32% of the overall market share. This also indicates an expected consolidation in the telecom space owing to pressure margin over 2016-2021. For instance acquisition of two companies by Rostelecom; namely Morton Group, a telecom assets manufacturer, and AIST, a telephony and broadband provider, helped Rostelecom to improve its position in the broadband segment.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Russian Federation Telecommunications market in comparison with other European countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Russian Federation Telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Russian Federation Telecommunications market.

Industry Benchmarking - Benchmark how the Russian Federation Telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration,

and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Russian Federation Telecommunications market by business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

REASONS TO BUY

Will tensions with neighbouring countries have an impact on the Russian Federation's Telecommunications industry?

Have technological advances drastically changed the face of the Telecommunications industry?

How is the market performing in terms of: Revenues, Subscribers, ARPU, and Customer Churn?

How risky is it to invest in the Russian Federation Telecommunications industry compared to other European countries?

What is driving the performance of key industry segments such as Voice, Data, Prepaid, Postpaid, Broadband, and IPTV?

Who are the leading players in the Russian Federation Telecommunications industry and how does their performance compare?

What trends are being witnessed within the Russian Federation Telecommunications industry?

How will the breakdown for mobile connection technologies look by 2021?

What are the Russian Federation Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How has the financial deals landscape changed in 2015 and 2016?

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