

Research Deliver Insight into Russia - Telecoms, Mobile and Broadband Market Market 2019-2025

WiseGuyReports.com "Russia - Telecoms, Mobile and Broadband - Statistics and Analyses" report has been added to its Research Database.

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Scope of the Report:

Russia - Telecoms

Russia's mobile operators gear up for 5G services by 2019

The Russian telecom market is the largest in Europe, supported by a population of about 143.5 million. The country's ongoing economic woes, partly resulting from difficulties associated with a range of sanctions related to the annexation of Ukraine, have impacted growth in the telecom sector.

The market is dominated by the western regions where the main cities and economic centres are concentrated. All sectors have been liberalised, with competition most prevalent in Moscow and St Petersburg. The former holding company for Russia's incumbent telecom operators, Svyazinvest, has emerged as Rostelecom, with most regional players absorbed into the operator. Rostelecom subsequently merged its mobile business with Tele2 Russia, which launched mobile services in the important Moscow market in October 2015.

Telcos continue to deploy and modernise fixed-line network infrastructure to offer improved broadband services as well as a range of IP-delivered content. The government is investing billions of Rubles in a 200,000km telecom network which will provide a broadband service of at least 10Mb/s to thousands of underserved villages. Rostelecom has been contracted to undertake and manage the work.

Russia has also emerged as one of Europe's fastest growing markets for fibre-based broadband, with Rostelecom's own fibre broadband access network covering more than 33 million premises. By the end of 2016 some 60% of the company's broadband subscribers were on its fibre infrastructure.

The number of mobile subscriptions has passed 230 million, while SIM card penetration is high, at around 162% by early 2017. Several mobile network operators are active, although the market is dominated by four major operators (MTS, VimpelCom, Tele2 Russia/Rostelecom and MegaFon). These have expanded their footprints widely through the acquisition of smaller regional service providers. Tele2 Russia has undergone several changes of ownership in recent years, becoming a significant player following its merger with Rostelecom. Competition in the key markets of Moscow and St Petersburg is fierce, due to the size of the cities' populations and the higher concentration of wealth there. Tele2 Russia launched services in Moscow in late 2015 and has steadily gained market share.



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The extensive deployment of LTE infrastructure is supporting growth opportunities through mobile broadband and data services, which make up a growing proportion of overall mobile revenue. Investments in carrier aggregation and LTE-A technologies have further boosted network capabilities, while operators have also have strategies in place to prepare for 5G. Trials of 5G-based services are expected to be undertaken during the 2018 football World Cup, to be held in Russia.

This report provides an overview of Russia's fixed-line telecom and IT markets. It includes information on key regulatory developments, data on fixed-line networks, and an assessment of telcos' financial and operating performance. The report also covers the mobile market, assessing regulatory developments and detailing the strategies of the major operators. It evaluates technologies and areas including mobile data, content and applications. In addition the report provides data and analyses on the fixed-line and wireless broadband market, noting developments in a range of technologies including DSL, cable and FttX and providing subscriber forecasts to 2021.

Key developments:

Rostelecom appointed the sole universal telecom services provider, contracted to develop telecom network offering improved services to 13,600 villages;
Rostelecom considers increasing its stake in Tele2 Russia;
MTS launches MTS Money Wallet service;
MegaFon and VimpelCom sharing 1,300 LTE base stations by March 2017;
VimpelCom contracts Huawei to trial LTE-A and 5G technologies;
VimpelCom agrees to sell tower infrastructure to Russian Towers;
Ericsson and MTS sign agreement to develop 5G services by 2018;
Rostelecom's fibre subscriber base broaches 7.3 million by end-2016;
Moscow City Telephone Network reports having 1.63 million subscribers on its GPON network;
Rostelecom opens tender to upgrade DSL areas with VDSL2;
Report update includes the regulator's market data to September 2016, telcos' financial and operating data to Q4 2016, recent market developments.

Companies mentioned in this report:

TransTeleCom, VimpelCom, ER-Telecom, MTS, Rostelecom, PeterStar, MegaFon, Tele2 Russia, Skylink, Volga Telecom, SMARTS Group, Uralsvyazinform, Synterra Telecom, Comstar, Summa Telecom, MetroMAX, Yota, Virgin Connect, Enforta, Golden Telecom, Mostelecom, Akado Group, NTV, Ren TV, CTC Media, TV Radio Company.

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