Russia: Falling Voice Revenue and Macroeconomic Uncertainty to Slow the Growth of the Telecom Market

Description:
The telecommunications market in Russia will generate $19.3bn in service revenue in 2016. Telecom service revenue is expected to grow at a CAGR of 1.0% during 2016-2021, primarily driven by the growth in mobile data revenue. Mobile data will be the primary growth driver during the period, benefitting from LTE investments, along with higher smartphone penetration led by aggressive commercial efforts via operators' own-brand retail chains. Pay-TV revenue will be another market driver. Operators are focusing on unleashing demand for data services and exploring new revenue streams in IoT/M2M, cloud, HD TV and other data-intensive services.

Key Findings
The overall telecom service revenue in Russia is estimated to generate $19.3bn in 2016 (down by 11.1% over 2015) and is estimated to reach $20.3bn by 2021. The growth will be mainly driven by data segments (mobile and fixed) and pay-TV. The Russian telecom market will be dominated by the big three players, MTS, Megafon and Beeline, with all major players offering mobile, fixed and pay-TV services. Due to intense competition and declining traditional voice services, operators are focusing on innovative bundled offerings and affordable data-enabled devices. Moreover, operators will continue to invest in LTE expansion, 5G, HD and IoT/M2M technologies to have a competitive edge in the market.

Synopsis
“Russia: Falling Voice Revenue and Macroeconomic Uncertainty to Slow the Growth of the Telecom Market” provides an executive-level overview of the telecommunications market in Russia today, with detailed forecasts of key indicators up to 2021. It delivers deep quantitative and qualitative insight into the Russian telecom market, analyzing key trends, evaluating near-term opportunities and assessing risk factors, based on proprietary data from the author’s databases.

The Country Intelligence Report provides in-depth analysis of the following:

- Regional context: Telecom market size and trends in Russia compared with other countries in the CEE region.

- Economic, demographic and political context in Russia.

- The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, number portability and more.

- A demand profile: analysis as well as historical figures and forecasts of service revenue from the fixed telephony, fixed Internet, mobile voice and mobile data and pay-TV.

- Service evolution: a look at changes in the breakdown of overall revenue between the fixed and mobile sectors and between voice, data and video from 2014 to 2021.

- The competitive landscape: an examination of key trends in competition and in the performance, revenue market shares and expected moves of service providers over the next 18-24 months.

- In-depth sector analysis of fixed telephony, broadband, mobile voice and mobile data services: a quantitative analysis of service adoption trends by network technology and by operator, as well as of average revenue per line/subscription and service revenue through the end of the forecast period.

- Main opportunities: this section details the near-term opportunities for operators, vendors and investors in Russia's telecommunications market.

Reasons To Buy
- Gain in-depth analysis of current strategies and future trends of the telecommunications market in Russia, service providers and key opportunities in a concise format, to build proactive and profitable growth
strategies.

- Understand the factors behind ongoing and upcoming trends in Russia's mobile communications, fixed telephony, broadband markets and pay-TV markets, including the evolution of service provider market shares, to align product offerings and strategies to meet customer's demand.

- Leverage the graphical information (more than 20 charts and tables in the report based on the Pyramid Research forecast products), to gain an overview of the telecom market in Russia.

- Analysis of key telecom players in the markets and major business strategies being adopted by them, to identify the opportunities to improve the market share.

- Explore novel opportunities to align your product strategies and offerings to meet the requirements and succeed in the challenging telecommunications market in Russia.

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