

Australia Telecommunications Report Q1 2012

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Abstracts

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Our update on the Australian telecoms market provides the latest data from only one of the three major operators, Singapore Telecommunications' Optus, as Telstra and Vodafone Hutchison Australia (VHA) only publish financial data and subscriber information every six months. This report does include the new data from the Australian Bureau of Statistics (ABS) relating to internet activity, which dates to June 2011.

After a poor performance in the second quarter of 2011, BMI calculates that Australia's three main mobile operators gained 257,000 new subscribers during Q311, taking the total market to 28.777mn subscribers. While this is a marked improvement on the losses posted, particularly by VHA, in the second quarter of the year, BMI has revised its full year forecast for 2011 downwards as a result.

Despite the fact that Australia is a mature market and that penetration rates are well above 100%, there are still some growth areas in the mobile market, particularly in terms of data and VAS. Telstra revealed in November 2011 that it will launch LTE 4G handsets and tablets in the first quarter of 2012, to join the USB dongles that it already offers on a LTE network, while Optus has also announced its plans to launch a 4G service in Q112. Meanwhile, Internode has revealed its plans to launch a branded mobile telephone service within the next six months, while MVNO iiNet has voiced ambitions of having its own network. New data on Australia's internet and broadband sector shows that mobile connections are now the most popular means of connecting to the internet, accounting for 44% of all connections in June 2011, compared with 41% of connections via DSL. The ABS's figures confirm that dial-up connections are rapidly declining, and that Australians are turning to faster connection speeds.

Progress has also been made on Australia's National Broadband Network (NBN)

project. Telstra's shareholders voted in October 2011 to decommission its current copper-based network in order to participate in the NBN – in exchange for a payment of AUD11bn (US\$11.3bn) over 30 years. Telstra is obliged to separate its operations, and the deal is subject to approval by the Australian Competition and Consumer Commission. In the same month, the NBN also revealed its 12-month construction plan for the project and in November 2011 the NBN awarded two contracts, one relating to construction and another to cables and equipments, to advance its roll-out plans. In other broadband developments, in Q411, iiNet acquired Canberra-based broadband supplier TransACT.

Data from Optus confirms a continued downward trend in terms of fixed-lines, although without additional figures from Telstra, BMI has not altered its forecasts here. Regionally, Australia regained second place in BMI's Asia Pacific business environment ratings this quarter.

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