

# Indonesia Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** Although current and ongoing investments are certainly helping to improve the country's fixed broadband infrastructure, geographical barriers due to Indonesia's archipelagic nature and high rollout costs will pose downside risks to the government's plans to develop the country's fixed broadband infrastructure. By engaging in 4G network and infrastructure sharing arrangements, Indonesia's mobile networks operators will benefit from efficiencies that will not only boost LTE rollout speeds, but also help the operators reduce costs. The proliferation of 4G mobile connections could have a dampening effect on demand for fixed broadband services. Having said this however, we envisage downside risks to 4G service uptake, as the new minimum local content requirements on LTE-enabled devices could have the effect of increasing production costs and, consequently, the price of smartphones.

### Latest Updates & Industry Developments

Total subscriptions in the mobile sector grew to 323.8mn at the end of 2015, for a penetration of 125.7%. Amid market saturation, mobile operators will aim to reverse downward trending ARPU's by migrating subscribers on to postpaid plans and higher-value services.

Fixed broadband subscribers will grow by 16.9% in 2016 to reach 9.00mn, and this number is expected to rise to 15.76mn in 2020. However, penetration will still remain low at 5.8% as costs and topological factors limit expansion speed.

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