

# Malaysia Telecommunications Report Q1 2016

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## Abstracts

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Malaysia's three leading mobile network operators experienced a net loss of 339,000 subscriptions in the first nine months of 2015. This is based on data reported by Maxis and DiGi and on estimates for Telenor-backed Celcom, Despite this, we maintain that the total number of mobile subscriptions reached 46.411mn by the end of 2015, equivalent to a penetration rate of 151%. This view is based on the belief that the three established operators lost customers to the smaller players, a trend which coincided with the continued phasing-out of unused prepaid subscriptions.

By the end of 2019 we expect the number of mobile subscriptions to rise to 48.34mn. Growth across the market as a whole will be driven by migration to 3G/4G services and by a trend towards the use of multiple SIM-connected devices. Mobile ARPUs will continue to decline gradually, as price competition undermines the benefits of moving to premium services.

In the wireline market, the main focus of growth will continue to be on the development of fibre-based high-speed access and backbone networks. Higher capacity wireline broadband infrastructure will facilitate the deployment of new services, including online video. By 2019 there will be 14.84mn broadband accesses, up from 14.12mn at the end of 2015.

## Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Industry SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (Malaysia 2012-2019)

Industry Risk Reward Index

Industry Risk/Reward Index

Table: Asia Pacific Telecoms Risk-Reward Index - Q116

Market Overview

Market Drivers & Trends

Mobile

Table: Malaysia Wireless Market, Q315

Wireline Voice & Broadband

Pay TV/Convergence

Regulatory Development

Table: Malaysia - Regulatory Bodies And Their Responsibilities

Legislation

Regulatory Developments

Competitive Landscape

Mobile Operator Data

Table: Mobile Market Overview

Table: Maxis Communications

Table: Celcom Group

Table: DiGi

Company Profiles

Telekom Malaysia

Maxis Communications

Celcom

DiGi Telecommunications

Demographic Forecast

Table: Population Headline Indicators (Malaysia 1990-2025)

Table: Key Population Ratios (Malaysia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Malaysia 1990-2025)

Table: Population By Age Group (Malaysia 1990-2025)

Table: Population By Age Group % (Malaysia 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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