

Malaysia Telecommunications Report Q3 2016

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Abstracts

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Based on data reported by Malaysia's mobile network operators Maxis and DiGi and Celcom, and by the country's telecoms sector regulator, BMI believes that mobile subscriptions reached 45.378mn at the end of 2015 - a penetration rate of 149.6%.

The three established operators appear to have lost customers to smaller players during the year. This trend coincided with the continued phasing out of unused prepaid subscriptions. The operators in question declared a total of 37.069mn subscribers at end of 2015 - a loss of 233,000 in the year. We now forecast that mobile subscriptions will rise to 47.54mn by the end of 2020. Migration to 3G/4G services will drive growth across the market as a whole. Increased use of multiple SIM-connected devices will also contribute to this growth. Mobile ARPUs will decline gradually, as price competition undermines the benefits of moving to premium services.

In the wireline market, the main focus of growth will 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 2020, we forecast broadband access figures of 8.284mn, up from 6.9mn at the end of 2015.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Industry SWOT

Industry Forecast

Latest Updates

Structural Trends

Industry Risk Reward Index

Asia Pacific Risk/Reward Index

Table: Asia Pacific Telecoms Risk/Reward Index, Q316

Industry Risk Reward Ratings

Market Overview

Market Drivers & Trends

Mobile

Table: Maxis, DiGi & Celcom Financials: Outlook Stable

Wireline Voice & Broadband

Pay-TV/Convergence

Regulatory Development

Table: Malaysia - Regulatory Bodies And Their Responsibilities

Legislation

Regulatory Developments

Competitive Landscape

Table: Key Players

Mobile Operator Data

Table: Mobile Market Overview

Table: Maxis Communication

Table: Celcom

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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