

Singapore Telecommunications Report Q1 2016

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Abstracts

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BMI View: We believe 4G and fibre-optic technology will power growth in Singapore's telecommunications market as consumers demand more complex, bandwidth-intensive premium media services. With most citizens now online, the digital services sector generates high levels of turnover. It is not surprising, therefore, that at least two companies have expressed interest in the country's fourth mobile licence. A cost-focused new entrant would disrupt the market in 2016, and SingTel, M1 and StarHub have begun to focus on subscriber retention, whilst looking for new revenue streams that leverage using existing assets.

Latest Updates & Industry Developments

We forecast Singapore's mobile sector will grow by an average rate of about 1.81% annually between 2015 and 2019, with 4G being the main driver of growth. We believe 3G/4G subscriptions will reach 8.032mn by the end of 2015, and hit 8.695mn by end-2019.

The number of fixed telephone lines in service have remained resilient to mobile substitution as more and more subscribers opt for triple and even quad-play bundles. Next generation fibre connections continue to be the growth driver for the Singaporean broadband industry. We forecast 4.084mn broadband subscribers by end-2015, a number which will rise to 4.567mn by 2019.

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