

Singapore Telecommunications Report Q3 2016

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Abstracts

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BMI View: Singapore's mature mobile market could experience a change in competitive landscape in 2016/2017, with the entrance of a fourth mobile operator possibly affecting a faster decline in ARPU. However, opportunities in the Internet of Things (IoT) are ripe and we expect the launch new services and innovative products in 2016 to bolster revenue growth and subscriber retention.

Latest Updates And Industry Developments

We forecast Singapore's mobile sector will grow by a CAGR of about 1.59% from 2015 to 2020, with 4G being the main driver of growth. We believe 3G/4G subscriptions will reach 8.318mn by end-2016 and hit 8.889mn by end-2020.

The number of fixed telephone lines in service has remained resilient to mobile substitution as more and more subscribers opt for triple-play and even quad-play bundles. Next generation fibre connections continue to be the growth driver for the Singaporean broadband industry. We forecast 4.242mn broadband subscribers by end-2016, a number which will rise to 4.502mn by 2020.

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