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Abstracts

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BMI View: Premium products are services that will further drive the development of Singapore's telecommunications market. We believe 4G and fibre-optic technology will power this growth as consumers increasingly demand more complex, bandwidth-intensive rich 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 and existing players - SingTel, M1 and StarHub - will need to consider carefully their medium-term investment strategies and look for new revenue streams they can leverage using existing assets.

Key Data:

We forecast Singapore's mobile sector will grow by about 1.5% annually between 2015 and 2019, owing to the high penetration and a shift in operators' strategies.

4G subscribers reached 3.476mn in Q115, growing by 46.1% over the year, while 3G declined by 1.361mn.

The number of fixed lines reached 1.001mn in Q215 and we forecast the number of subscribers to decline to 1.898mn in 2019.

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