

Taiwan Telecommunications Report Q1 2016

<https://marketpublishers.com/r/T91F440496AEN.html>

Date: December 2015

Pages: 60

Price: US\$ 1,295.00 (Single User License)

ID: T91F440496AEN

Abstracts

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BMI View: As aggressive bidding for spare 4G spectrum gathered momentum in late 2015, it became clear that there is a surfeit of competition in Taiwan's saturated mobile market. Pressure for operators to consolidate will intensify in 2016, but regulatory resistance is expected; this would be damaging to an industry that needs to address mounting debt ahead of the adoption of 5G early in the next decade and growing demand for 'everything everywhere' services and solutions.

Latest Updates & Industry Developments

Mobile subscriptions increased marginally in 9M15, reflecting saturated market conditions. We forecast 30.223mn subscriptions by end-2015, rising to 33.616mn in 2019. 3G/4G migration will drive growth, although some multi-SIM ownership will persist.

Demand for low-capacity wireline broadband continues to decline, but 4G and fibre connections will facilitate uptake of high-value triple- and quad-play services. Subscriptions will reach 31.659mn in 2019, but will yield higher ARPU.

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