

# Taiwan Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** 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. Growth in the market will be driven by the uptake of advanced services and data packs as a tech-savvy population remains committed to newer technological innovations.

### Latest Updates & Industry Developments

Mobile subscriptions fell modestly in Q116. We forecast 30.720mn subscriptions by end-2016, rising to 33.053mn in 2020. It will be 3G/4G migration that will drive growth, although some multi-SIM ownership will persist.

Chungwha and Taiwan Mobile have requested the government to continue supporting its subsidy for the migration of 2G customers onto 3G/4G services. The current 2G licenses are set to expire in June 2017. There were an estimated 710,000 2G customers in the market as of April 2016. The operators are requesting that the Ministry of Economic Affairs' Industrial Development Bureau continue its support for consumers looking to trade their 2G handset for a 3G/4G compatible one. The operators are looking to migrate all subscribers by 2017.

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 30.142mn in 2020, but will yield higher ARPU.



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