

Australia Telecoms Industry Report - 2022-2027

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Abstracts

This report provides analyses of revenue and market forecasts as well as statistics of the Australian telecoms industry including market sizing, 5-year forecasts, market insights, key telecom trends, 5G, digital infrastructure and also features the following:

Overall Telecommunications Market by Major Operators

Telco Operators Profile, Revenue and EBITDA Mix

Mobile Subscribers & Revenue Market Overview and Forecasts

Spectrum Holdings

IoT Market Overview

Broadband Subscribers & Revenue Market Overview and Forecasts

Digital Infrastructure (Fibre, Telecom Towers, Data Centres, Submarine Cables)

National Broadband Network Detailed Market Overview and Forecasts

Telecom Tower Market Analysis and Forecast

Thematics / Opportunities relating to 5G, M&A and e-Commerce

Telco M&A Transaction Database

WHY YOU SHOULD BUY THE AUSTRALIA TELECOMS INDUSTRY REPORT:

Benefit from the latest market opportunities

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Forecasts as a key input for successful budgeting and strategic business planning in the telecoms market

Target business opportunities and risks in the telecoms sector through our reviews of the latest industry trends, regulatory changes and major deals, projects and investments

Assess the activities, strategy and market position of your competitors, partners and clients via our Operators Profiles

The Australia Telecoms Market Industry Report, 2022-2027 includes an overview of the Australian market dynamics, market sizing, market forecasts, analysis, insights and key trends

EXECUTIVE SUMMARY

Australia Telecoms Industry Report at a Glance

Globally, the telecommunications sector is proving to be a core and essential infrastructure service to national economies, with data infrastructure becoming critical in a connected world and will likely increasingly attract a new class of investors such as large infrastructure funds. Idem Est Research expects the Australian telecommunications industry to remain steady thanks to the defensiveness nature of the industry, amid the political uncertainties and an uncertain economic outlook due to the COVID-19 pandemic.

Australia has one of the most competitive and mature telecommunications markets in the world. Idem Est Research forecasts that mobile subscriptions will continue to grow

in the 2022-27 period while fixed broadband subscribers also expected to grow at a slightly lower average rate over the same period.

Idem Est Research forecasts the overall telecoms market bottomed out in 2021 as NBN subscriber payments to Telstra and Optus decline gradually as all Telstra's copper and HFC services are migrated onto the NBN and market growth will resume from 2022 onwards.

Telstra's share of the telecommunications revenue pie has been declining over the last 5 years and its EBITDA share is declining even faster as Telstra's dominance in the fixed-line market is challenged with the migration onto the NBN.

Capex Investments

The capital expenditure (Capex) from telecommunications operators is coming off from an all-time peak between 2017 to 2018 due to the NBN investments in upgrading Australia's fixed broadband infrastructure. Idem Est Research expects Capex investments to remain sustained to accommodate for data usage growth, mobile coverage expansion and capacity improvements. NBN expects an increasing Capex spend from 2022 to bring 75% of its fixed-line footprint to 100Mbps speeds and above but excludes a clear plan to a gigabit speeds network upgrade to full-fibre. Instead, NBN will be required to continually invest in HFC and fixed wireless to increase capacity and accommodate more customers and higher data usage.

Mobile Subscribers and Revenue

The mobile subscriber market increased between 2015 and 2021 with Telstra and Optus growing their postpaid subscriber base and Telstra also increasing its MVNO and IoT subscribers significantly over the same period 2015-21 period. Idem Est Research estimates the Australian mobile subscribers will increase on the back of population growth and Internet of Things subscribers take-up.

Mobile network operators are facing competitive pressure with the market shifting to unlimited voice and text and data allowance as the sole offering differentiator. Operators are also bundling mobile plans with content offerings such as sport, music and video streaming.

Australia is now in the unfortunate position of being the only country in the developed world with a higher average mobile speed compared to fixed broadband as per Ookla

speed tests.

Idem Est Research expects 5G subscribers to represent 85% of all mobile subscribers by 2027.

Broadband Subscribers & the NBN

Idem Est Research estimates the broadband subscribers growth will be sustained by household growth and a reduction of the number of underserved premises previously not able to connect now served by the Internet but now served by the NBN.

By 2023, Idem Est Research forecasts most subscribers migrated to NBN broadband services with a few remaining ADSL services in fixed wireless and satellites services and a number of fibre premises provided by greenfield operators and in-fill operators supplying wholesale services on the same terms as NBN. Uniti, other smaller greenfield operators and TPG are sharing the non-NBN market.

Thematics – 5G / Tower Sale / 6G / M&A

The arrival of 4G moved the Internet off our desktops into our palms and pockets, 5G could transform the network from something we carry around to something taking us around either virtually (augmented reality or virtual reality) or in reality (autonomous vehicles), the 5G outcome and benefits beyond fast connectivity remain largely unknown in terms of business models, investments required and timeline.

With 5G a reality now in Australia, telco operators can now do an arbitrage of NBN speeds in areas where the copper lines are very long or in poor health and thus offer a faster service over 5G than NBN at an equivalent price for some segments of the market and some geographies.

This report shows subdued growth due to ARPU pressure compounded by margin pressure in the fixed broadband market is pushing telcos to look for outside opportunities to increase scale. Idem Est Research expects another wave of consolidation in Australia, similar to the 2010-2015 period, post-NBN rollout as margins get squeezed further. Smaller NBN resellers will struggle to compete and sell out to larger operators. Some market players outside the telco market are seeking growth by exploring ways to increase their scope of products and services offerings. The report outlines examples of some newcomers branching out by reselling broadband access services as a churn reduction strategy and increasing consumers' share of wallet.

Investment funds are assigning high valuation multiples to telecommunications infrastructure assets such as mobile towers, data centres, submarine cable and fibre infrastructure. This report outlines some real market examples of how investors view and value these investments with real industry examples and EV/EBITDA comparatives and benchmarks.

Tower Sale

Traditionally, mobile coverage and therefore mobile towers have been a source of competitive differentiation and operators have shown limited interest in carving out their mobile infrastructure until now. Following Telstra and Optus' successful sale of towers, TPG is also exploring a potential sale, while Axicom and Broadcast Australia owners are selling their tower portfolios. In the space in 3 years, a new ownership map of mobile tower infrastructure is being drawn with infrastructure funds playing an active role rather than foreign towercos.

Our Australia Telecoms Industry Report transactions database analysis highlights a resurgence of activity in 2020 and 2021 and the market's appetite for larger deals with the Vodafone/TPG merger, Uniti/Opticomm tie-up and the sale of Telstra and Optus towers drawing interests from infrastructure investors for other assets.

Idem Est Research also outlines select telecommunications transactions over the last 6 years. The last four years saw a slew of tier 2 telcos players rolling up smaller players to increase regional presence and scope of offerings. This came after a period of large consolidation deals that happened between 2010 and 2016. So far in 2021, the Vocus acquisition by Macquarie Infrastructure and Aware Super, the Exetel acquisition by Superloop, the minority sale of Telstra towers and the 70% sale of towerco ATN by Optus towers are putting a renewed focus on large transactions with TPG, Axicom and Broadcast Australia tower portfolios also for sale.

KEY COMPANIES MENTIONED IN THIS AUSTRALIA TELECOMS INDUSTRY REPORT:

AGL, Amplitel, ATN, Aussie Broadband, Exetel, Foxtel, NBN, Optus, Superloop, Telstra, TPG, Uniti Group, Vodafone, Vocus

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