

# Indonesia - Telecommunication Services: A developing market (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

The Indonesian telecom market is a developing, with strong potential in mobile segment. Its mobile subscriptions increased at 6% CAGR during 2012-2016 and is expected to increase further at a CAGR of 1.3% over 2016-2021 to reach 380 million in 2021. The growth is attributed to increase in mobile phone adoption and individuals holding multiple subscriptions. Mobile user penetration (as % of population) stood at 73.5% in 2016 and this is expected to grow to 75.3% by 2021.

MarketLine's Premium industry reports provide a comprehensive market view including sections on: industry risk & reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

### KEY HIGHLIGHTS

Prepaid and post-paid set for encouraging growth

The mobile segment's total subscriptions increased over 2012-2016, at a CAGR of 6.0%, from 281.7 million in 2012 to 355.9 million in 2016, and are expected to grow at a CAGR of 1.4% to reach 380.7 million by 2021. The growth is the result of an increased adoption of mobile phones, with both prepaid and post-paid segments contributing.

Mobile prepaid subscriptions increased over the review period, at a CAGR of 5.9%, from 278.2 million in 2012 to 349.7 million in 2016, and are expected to increase at a CAGR of 1.3% to reach 373.3 million by 2021. This is due to promotional plans offered by operators that target the younger population.

Mobile post-paid subscriptions increased at a CAGR of 15.3%, from 3.5 million in 2012 to 6.1 million in 2016, and are expected to increase further at a CAGR of 4.2%, to reach 7.5 million by 2021. This is due to bundled packages offered by operators.

Imminent 5G networks will provide significant opportunities

Ericsson completed the first demonstration of 5G in Indonesia, including 5G test bed, with plans to launch 5G services in 2020. It will help transform IT infrastructure in Indonesia, bringing more opportunities to businesses, people, and society.

Government plans to provide fast broadband Internet services to rural and urban areas

Several initiatives taken by the government are likely to benefit the operators. Indonesian Government is involved in the Palapa Ring project, which is an IT -infrastructure project involving government-to-business cooperation's. This project, involving an undersea optical fiber network, covers across 13,000 kilometres under the sea level, with an on-shore network spanning nearly 22,000 kilometres. Its primary focus is on providing fast broadband internet services to both rural and urban areas by 2019. This augurs well for operators offering broadband services.

## **SCOPE**

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the Indonesian Telecommunications market in comparison with other Asia-Pacific countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the Indonesian Telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Indonesian

Telecommunications market.

Industry Benchmarking - Benchmark how the Indonesian telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Indonesian Telecommunications market by business segment on metrics such as churn, ARPU, and subscriber and revenue growth.

## **REASONS TO BUY**

How badly has the Indonesian mobile voice revenue market been performing in the 2012-2016 period?

What are the Indonesian telecommunication market's biggest strengths and weaknesses for the future?

What markets show the biggest CARG potential in the Indonesian telecommunications industry?

What government initiatives are in place to improve the telecommunications market in Indonesia?

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