



Fixed services in emerging Asia–Pacific: trends and forecasts 2019–2024



Andrew Yi-Ju Chern and Stephen Wilson

About this report

This report provides commentary and trend analysis to support our 5-year forecast for emerging Asia-Pacific (EMAP). It includes worldwide context and commentary on six key countries: China, Indonesia, Malaysia, Philippines, Thailand and Vietnam.

Our forecasts are based on our robust set of historical data and draw on a unique and in-house modelling tool that applies a rigorous methodology (reconciliation of different sources, standard definitions, top-down and bottom-up modelling).

For the complete data set for the region, please see Analysys Mason's DataHub at www.analysysmason.com/DataHub.

WHO SHOULD READ THIS REPORT

- Market intelligence, strategy and project managers at fixed operators in emerging Asia-Pacific.
- Regulatory bodies in emerging Asia-Pacific.
- Financial institutions that directly invest in the telecoms sector in the region, or advise others that do so.
- Press and media bodies that need a foundation of knowledge of the fixed telecoms market in emerging Asia-Pacific.



Our forecasts are refined throughout the year. This report presents the results at the time of publication and will continue to give useful background information about key drivers. However, we recommend that you always use the Analysys Mason [DataHub](http://www.analysysmason.com/DataHub) to view the latest data associated with this report.

GEOGRAPHICAL COVERAGE

Regions modelled

- Emerging Asia-Pacific (EMAP)

Countries modelled individually

- Bangladesh
- Cambodia
- China
- India
- Indonesia
- Malaysia
- Nepal
- Pakistan
- Philippines
- Sri Lanka
- Thailand
- Vietnam

KEY METRICS

Fixed connections

- Voice, broadband, IPTV, dial-up
- Narrowband voice, VoBB
- DSL, FTTP/B, cable, BFWA, other

Fixed revenue

- Service,¹ retail
- Voice, broadband, IPTV, dial-up, BNS
- DSL, FTTP/B, cable, BFWA, other

Fixed voice traffic

- Outgoing minutes, MoU

¹ Service revenue is the sum of retail and wholesale revenue.

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11. 91% of fixed broadband connections will be FTTP/B in 2024 due to significant investment in coverage expansion and migration from DSL
12. China will continue to lead in terms of fixed broadband penetration, but rapid FTTP/B roll-outs in other countries means that the gap will narrow
13. The lowest broadband ASPU in the region is in China thanks to government regulation and intense infrastructure competition
14. Competition and investment in NGA will drive the growth of fixed broadband household penetration in many countries in EMAP
- ## 15. Country-level trends
16. China: the total service revenue will continue to grow, but the market is reaching saturation point
17. Indonesia: the take-up of FTTP/B has grown rapidly; FTTP/B is now by far the most-widespread fixed broadband technology in Indonesia

18. Malaysia: the number of fixed broadband connections will increase due to fibre network investment and the renewed popularity of BFWA

19. Philippines: the number of FBB connections will grow due to the strong take-up of fibre-based access

20. Thailand: extensive FTTH deployments will be the main driver for FBB revenue growth

21. Vietnam: fibre will be the dominant technology in the fixed broadband market thanks to extensive FTTH roll-outs

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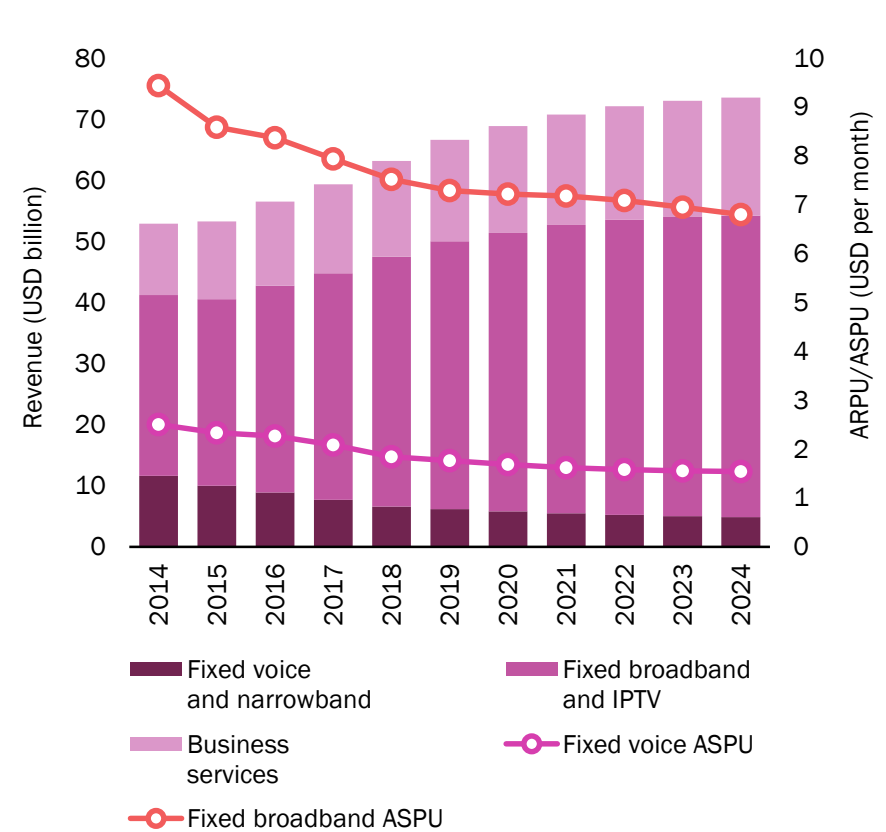
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FTTP/B will account for 91% of fixed broadband connections in 2024 due to increasing investment in fixed broadband and the shutdown of DSL networks

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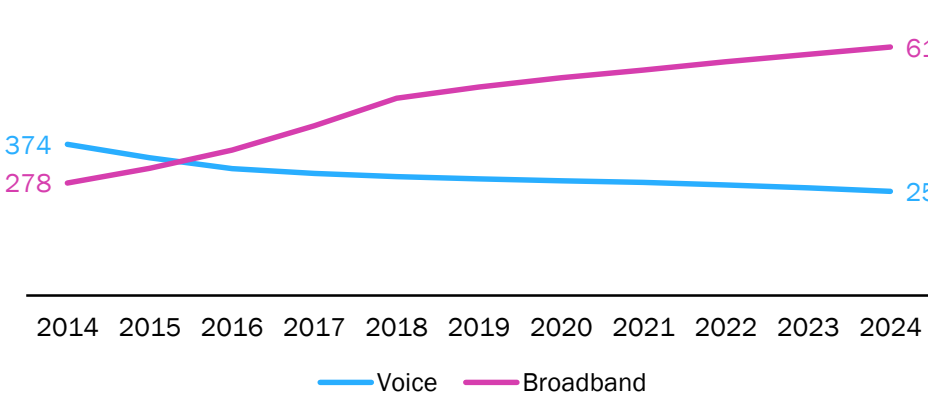


Source: Analysys Mason

Figure 4: Telecoms retail revenue and growth rate by service type, emerging Asia-Pacific, 2014-2024

Service type	Retail revenue (USD billion)		CAGR	
	2018	2024	2014-2018	2018-2024
Fixed voice	6.58	4.85	-13.2%	-5.0%
Fixed broadband	40.9	49.3	8.4%	3.2%
Specialist business services	15.6	19.3	7.6%	3.6%

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Source: Analysys Mason



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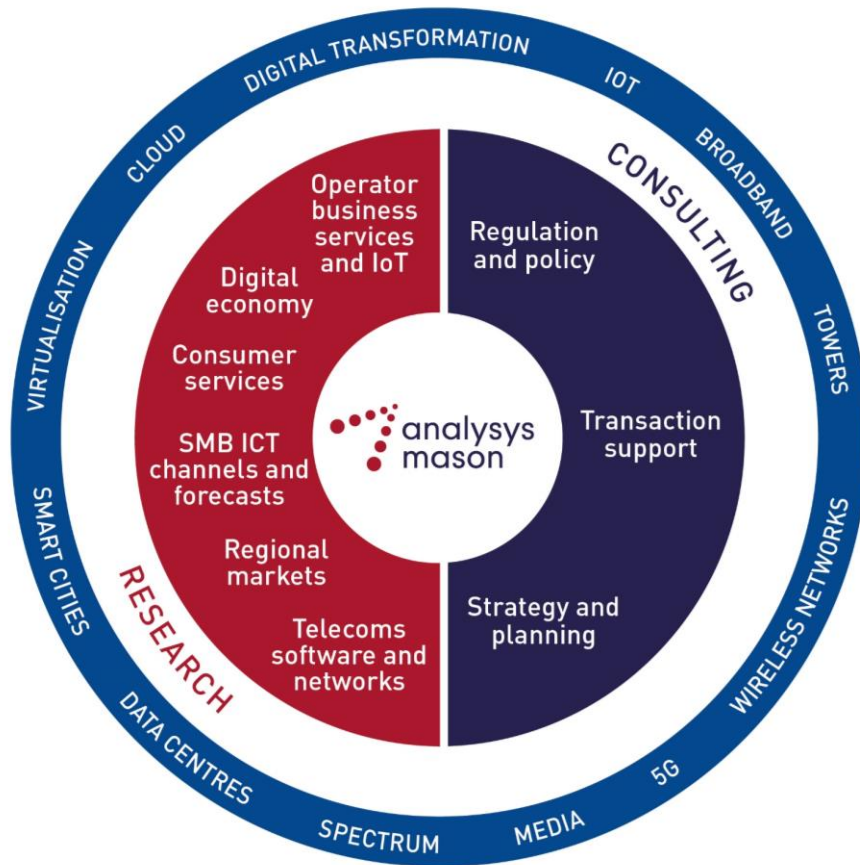
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Customer Engagement
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Digital Economy Strategies
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- Ex-post/abuse of dominance
- Postal sector



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- Technical due diligence
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- Joint-venture structuring
- Mid-market financial sponsors

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- Technology optimisation
- New digital frontiers



PUBLISHED BY ANALYSYS MASON LIMITED IN **AUGUST 2019**

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