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

Andrew Yi-Ju Chern and Stephen Wilson

RESEARCH

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.

DataHub

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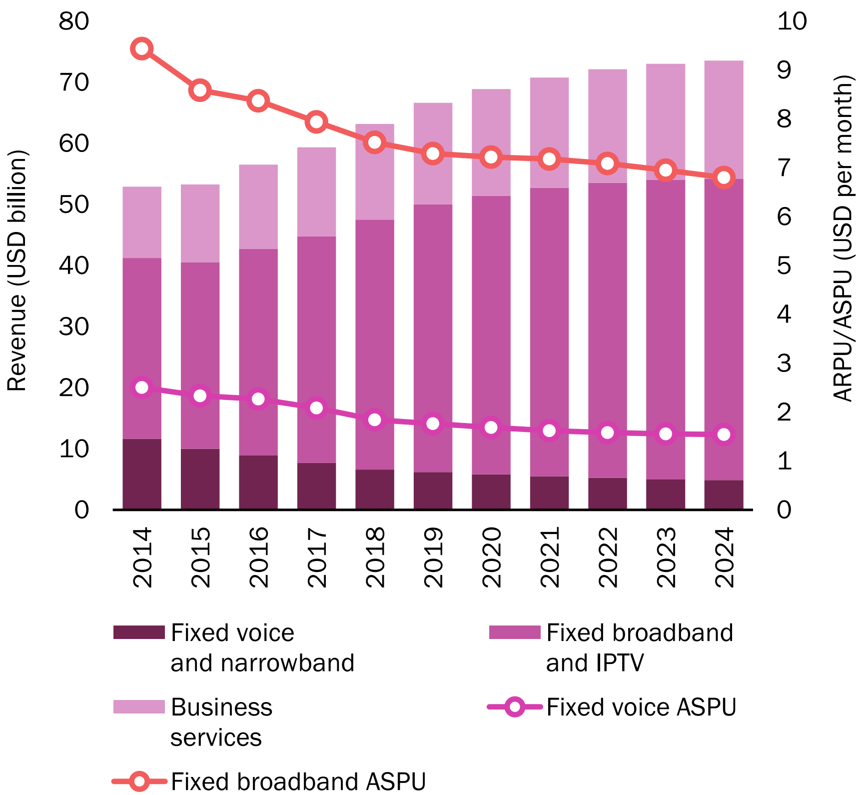
FTTP/B will account for 91% of fixed broadband connections in 2024 due to increasing investment in fixed broadband and the shutdown of DSL networks

Figure 3: Telecoms retail revenue by service type, fixed voice and fixed broadband ASPU, emerging Asia–Pacific, 2014–2024

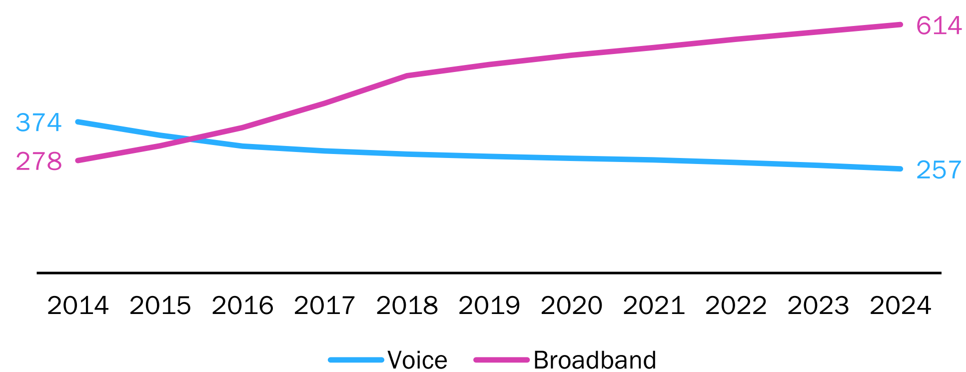


Source: Analysys Mason

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%

Figure 5: Fixed connections by type, emerging Asia–Pacific (million), 2014–2024



Source: Analysys Mason

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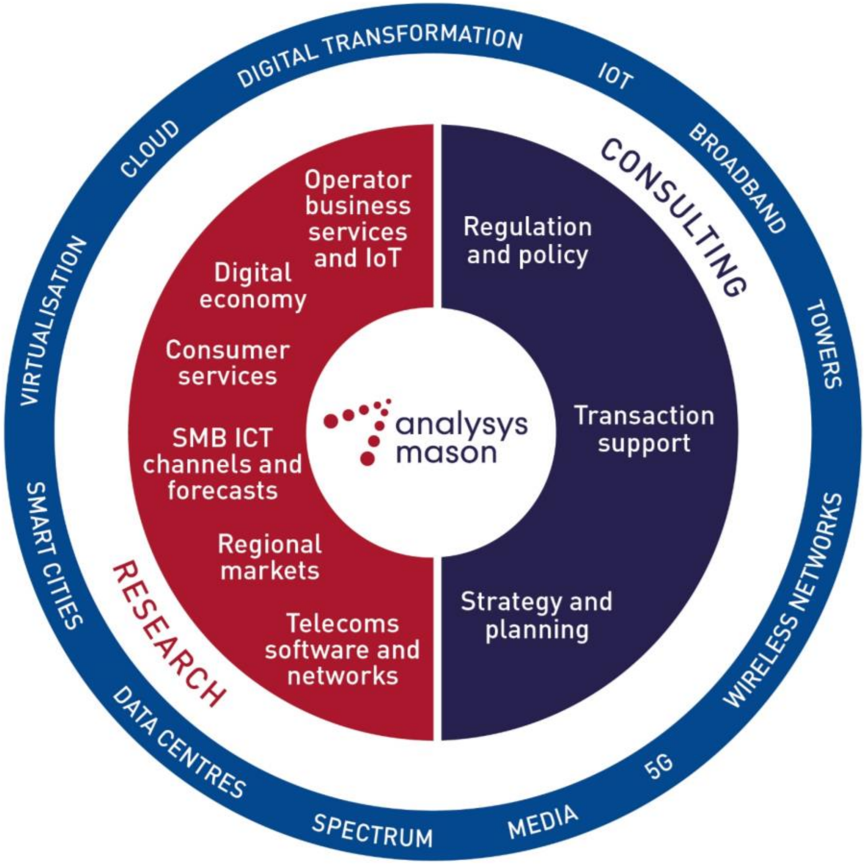
About the authors

Andrew Yi-Ju Chern (Research Analyst) is a member of the regional markets research team in London, contributing mainly to the *Telecoms Market Matrix*, *Asia–Pacific* and *Global Telecoms Data* research programmes. Prior to joining Analysys Mason, Andrew was a business analyst at Vodafone. Andrew holds a BSc in Economics and Finance from Tsinghua University and a MSc in Strategic Management from HEC Paris.

Stephen Wilson (Principal Analyst) is the lead analyst for Analysys Mason's *Fixed Broadband Services* research programme. He leads Analysys Mason's annual FTTx coverage, capex and conversion forecasts, and other recent areas of focus include examining fixed broadband operators' home Wi-Fi strategies. Stephen has more than 10 years of experience in the telecoms sector and is a graduate in Philosophy, Politics and Economics from St Catherine's College, Oxford University.

Analysys Mason's consulting and research are uniquely positioned

Analysys Mason's consulting services and research portfolio



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We deliver tangible benefits to clients across the telecoms industry:

- communications and digital service providers, vendors, financial and strategic investors, private equity and infrastructure funds, governments, regulators, broadcasters, and service and content providers.

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Digital Economy Strategies
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- Scarce resources: radio spectrum management, auction support, numbering ...
- Ex-post/abuse of dominance
- Postal sector

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- Technical due diligence
- Mergers and acquisitions (M&As)
- Debt and initial public offerings (IPOs)
- Joint-venture structuring
- Mid-market financial sponsors

STRATEGY AND PLANNING

- Commercial expertise
- Technology optimisation
- New digital frontiers

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