

Macau- Telecoms, Mobile, Broadband and Digital Media Market Analyses and Statistics 2017 to 2022

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[Macau - Telecoms, Mobile, Broadband and Digital Media Market 2017](#)

Summary

Fibre Broadband drives strong growth in Macau. Macau boasts a sophisticated, independently regulated communications market due to Macau's status as a Special Administrative Region (SAR) of the People's Republic of China following its handover from Portugal. Gradual liberalisation has now fully opened the telecoms market with the full impact slowly becoming evident. Demand for telecom services is significantly driven by the millions of visitors that visit the tiny enclave every year. 87% of visitors classified as residents of mainland China or Hong Kong.



Macau's fixed-line market is transitioning to a fibre broadband market as the incumbent Compahnia de Telecomunicações de Macau (CTM) invests significantly in fibre access networks. As of 2017 CTM had deployed fibre broadband coverage to the majority of residential units and 100% of commercial buildings. CTM's investment coincides with the entrance of Macau's second fixed-line operator MTEL, with the latter a threat to the monopoly CTM has over the fixed broadband market, a monopoly made possible due to CTM's ownership of the underlying fixed access network.

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CTM's aggressive tactics are showing results as the majority of households are expected to be connected via fibre by 2017, closing the window of opportunity for MTEL to poach subscribers from CTM's sizeable DSL subscriber base. CTM faces another potential competitor in Macau Cable TV operator which is obliged to expand the reach of its underground cable network sixfold by 2017.

Macau's mobile market is the most competitive sector of the telecoms market, with four mobile network operators and a mobile virtual network operator (MVNO) offering services. Competition is intense, with mobile penetration in excess of 200% due to multiple SIM card ownership as well as sales of SIM cards to visitors. Mobile broadband presents an alternative revenue growth opportunity, with LTE launches during 2015 allowing operators to offer more enticing products. In December 2015 CK 3 Macau launched its 4G LTE mobile network, making it the fourth and final LTE licensee to introduce commercial 4G services in the Special Administrative Region (SAR).

Key Developments:

3 Macau announced that its 4G LTE network covered more than 95% of outdoor areas throughout Macau.

Fibre is cannibalising Macau's largely ADSL-based broadband subscriber based

Market liberalisation and network coverage targets on new entrants is driving fibre investment

Macau's TV market is now officially open to competition Companies mentioned in this

report: Compahnia de Telecomunicações de Macau (CTM), MTel, Macau Cable TV, Macau Basic Television Channels Limited, MOOV, KKBox, Soliton, SmarTone, 3 Macau, China Telecom.

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Table of Contents

1. Executive summary

2. Key statistics

3. Country overview

3.1 Background

3.2 Macau's economy

4. Telecommunications market

4.1 Market Overview and Analysis

5. Regulatory environment

5.1 Historical overview

5.2 Regulatory authority

5.3 Liberalisation and regulatory developments

5.4 Licensing

6. Telecommunications infrastructure

6.1 Overview of the national telecom network

6.2 International infrastructure

6.3 Specific IT developments

6.3.1 Cloud Computing

7. Fixed-line broadband market

7.1 Market Overview and analysis

7.2 Broadband statistics

7.3 Forecasts – broadband subscribers – 2016; 2018; 2021

7.4 Fixed-line broadband technologies

7.4.1 Digital Subscriber Line (DSL) networks

7.4.2 Fibre-to-the-Premises (FttP) and Fibre-To-The-Home (FttH)

7.4.3 Other fixed broadband services

8. Mobile market

8.1 Market Overview and Analysis

8.2 Mobile statistics

8.3 Mobile Broadband Statistics

8.4 Forecasts – mobile subscribers – 2016; 2018; 2021

8.5 Mobile Regulatory issues

8.5.1 CDMA licences awarded

8.5.2 GSM shutdown

8.5.3 3G licences

8.5.4 LTE licensing

9. Mobile infrastructure

9.1 Analogue networks

9.2 Digital networks

9.2.1 GSM

9.2.2 WCDMA

9.2.3 4G LTE

9.2.4 Push-to-Talk (PTT)

10. Major operators

10.1 Market Share Statistics

10.2 Compahnia de Telecomunicações de Macau (CTM)

10.2.1 Overview

10.2.2 Background

10.2.3 Mobile

10.2.4 Operational statistics

10.3 MTel

10.4 3 Macau (Hutchison Telecom Macau)

10.5 SmarTone Mobile Communications (Macau) Ltd

10.6 China Telecom

11. Mobile content and applications

11.1 Introduction

11.2 m-banking (payments/loans)

12. Digital economy

12.1 Introduction

12.2 e-Commerce

12.3 e-Government

12.3.1 E-Macao

13. Digital Media

13.1 MCTV (Macau Cable TV) conflict

13.2 Macau Basic Television Channels Limited

13.3 Satellite TV

13.4 Music

.....Continued

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