

Philippines Telecoms, Mobile and Broadband Market Drivers, Trends and Opportunities 2019-2023

WiseGuyReports.com "Philippines - Telecoms, Mobile and Broadband - Statistics and Analyses" report has been added to its Research Database.

PUNE, MAHARASTRA, INDIA, July 19, 2019 /EINPresswire.com/ --

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Scope of the Report:

[Mobile infrastructure is improving in Philippines](#)



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Philippines prepares to launch 5G services

A substantial amount of capital continues to be invested in building telecommunications infrastructure throughout the Philippines.

Telecommunications investment in the Philippines will continue to see increasing emphasis on supporting high speed broadband access. The bulk of the fixed services are in urban areas. The fixed line market in the Philippines remains underdeveloped and fixed line penetration continues to show stagnant growth. A major reason for this is due to the dominance of the mobile segment and the rapid expansion of the mobile broadband segment.

Over the past five to ten years and particularly more recently over the past two years there has been significant new data centre builds and additions to existing capacity as new providers enter the South East Asian data centre market. More and more people are getting online and using cloud computing services, which is driving demand for data centre services.

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During the last few years, the major operators have also been forced to cope with the pressures of slowing growth in traditional areas of the market and rising investment needs for new growth areas such as consumer broadband – both fixed line and mobile. In particular, there has been good progress in the rollout of optical fibre infrastructure. PDLT announced plans to accelerate a network modernisation plan that will see it switching to fibre over the following two years.

Fixed broadband penetration in the Philippines remains relatively low mainly due to a limited number of fixed lines and the dominance of the mobile platform, which has in turn driven the

mobile broadband market.

Despite declining prices in both fixed and mobile broadband, this type of service is still not affordable for the majority of the population. Operators have been pushing hard with competitive low entry-level packages, but the market continues to struggle.

The DICT has staged a pilot run of the National Fiber Backbone (NFB). It will be operated by the DICT, which will also maintain the related facilities and provide last mile connectivity in the Philippines.

Over the next five years to 2024 strong growth is expected to continue from this very small base as both major fixed broadband operators, PLDT and Globe Telecom continue with their rollouts.

Smart Communications have teamed up with Google to deploy additional Wi-Fi hubs across the country as part of a drive to provide free connections nationwide.

There has been a major push by market leader PLDT to offer fibre-based services; Globe has been trying to match the PLDT push where it can. PLDT is also deploying hybrid technology, such as G.fast, under a wider three-year program.

Mobile subscriber growth is expected to be relatively low over the next five years to 2024 due to a highly mature and highly competitive market. The market will be driven by the uptake of both 4G and eventually 5G services as operators adopt these faster services.

Mobile ARPU levels have been on a downward trend for a long time in the Philippines as competition in the mobile industry has intensified. The operators continue to engage in aggressive price competition in an effort to grab market share.

The Philippines has seen a very rapid increase in mobile broadband penetration over the past five years driven by a rising level of wireless broadband users. Strong growth is predicted over the next five years to 2024, however at a slower and declining rate as the market further matures.

The Philippines is well on its way to launching 5G services. Smart Communications activated its first 5G cell sites in Makati and is testing the platform and developing solutions such as autonomous vehicles. Globe Telecom has revealed plans to launch its 5G service in partnership with Huawei Technologies later in 2019.

Key Developments

Telecommunications investment will continue to support high speed broadband access.

The Philippines data centre market has seen rapid recent growth.

Globe Telecom is now challenging PLDT in both the fixed and wireless markets.

Smart Communications have teamed up with Google to deploy additional Wi-Fi hubs across the country

The DICT has staged a pilot run of the National Fiber Backbone (NFB).

A smart city project off the coast of Manila has begun.

The Philippines has seen a rapid recent increase in mobile broadband penetration.

Mobile subscriber growth is expected to be relatively low over the next five years to 2023.

The Philippines is well on its way to launching 5G services.

Key companies mentioned in this report:

PLDT, Smart Communications, Globe Telecom, Liberty Telecom, Bayantel, Bell Telecom (BellTel), Digitel, Eastern Telecom (ETPI), Innove (Globe), PT&T, ABS-CBN Corp, Altimax, Bayantel, Broadband Philippines, Vega Telecom.

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Major Key Points in Table of Content:

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Country overview

Telecommunications market

Market Overview and Analysis

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