



CHAPTER 8 : OUTLOOK



This chapter sets out the outlook for the C&M industry and postal and courier industry. It highlights some projects and studies currently underway towards developing, among others, conceptual framework, regulatory review and economic forecast that will further shape the future of the industry. This chapter also presents the service providers strategic plans and sentiments amid challenging current environment.

FIFTH GENERATION MOBILE TECHNOLOGY (5G)

5G technology is an economic imperative for Malaysia as it has the power to rejuvenate industries that are integral to the country's economy. Nine industries have been identified as the focus areas of Malaysia's 5G technology. The industries are agriculture, education, entertainment, healthcare, manufacturing, oil and gas, smart city, smart transportation, and tourism.

Malaysia is laying the foundation in deploying 5G in Southeast Asia (SEA) through the implementation of 5G Demonstration Projects (5GDP). The 5GDP began in Langkawi with 35 use cases involving six verticals at 25 live 5G sites, actively operating from October 2019 until March 2020, with a total investment of USD24.9 million (RM101 million). This constitutes half of the total 72 use cases demonstrated in six states that include Kedah, Penang, Perak, Selangor, Terengganu and Kuala Lumpur. The 5GDP in these six states is expected to be completed in the middle of year 2020.

In addition to the technical and business preparation for 5G, MCMC will be conducting an in-depth economic study on the impact of 5G in Malaysia. Among the key areas of the study are projection growth of GDP and employment in the nine identified industries, return of investments and challenges of implementation. The study will address the impact of 5G at national and state levels.

The reality is that 5G is set to change our lives from daily routines, work processes to our personal sphere. Individuals and businesses alike will soon experience a new way of doing things when 5G becomes commercially available.

CONTENT SERVICES

The OTT providers are increasingly encroaching the traditional spaces occupied by the broadcasters in tandem with consumers' viewing preference, thus eroding the broadcasters' revenue. The growth of video streaming will continue to explode. More people will have streaming subscriptions than traditional pay TV subscriptions.

In order to sustain from the disruptive competition from OTT providers, broadcasters are required to implement digital transformation plan which includes new business models, understanding consumers need or demand and talent management. Future proofing this paradigm shifts also calls for a more inclusive and sustainable policy and regulatory intervention.

As the regulator of the C&M industry, MCMC is committed to protect the licensed content applications service provider (CASP) in this current challenging environment. MCMC will be conducting a study on a regulatory review of content applications service to address mainly the

issues on OTT. The study will cover among others, the impact of the digital terrestrial television roll-out and OTT on traditional content applications service market, identify challenges faced by current CASP and opportunities for growth, and conduct a benchmarking study against the best practices of other regulatory jurisdictions.

On the consumer side, the outlook for content services will be much more exciting with wide array of content choices available on digital platforms including local and international movies, series and documentaries. In terms of user experience, the sheer convenience of browsing shows without being bound to a broadcast schedule or worrying about programming a DVR makes traditional TV prehistoric. Also with the increased competition in the digital platform, consumers will enjoy attractive packages from various content service providers.

POSTAL AND COURIER SERVICES INDUSTRY

Over the last few years, the Malaysian e-Commerce market has experienced strong growth and this trend is expected to continue. The courier and delivery business is indeed a lucrative business, opening up new avenues for the e-commerce markets by simplifying the way how products are delivered. Based on industry feedback³⁸, majority of service providers (88% of respondents) are positive on the industry outlook for the next three years. Their sentiment is based on the explosive growth of e-commerce which can create higher demand for delivery services and enables the industry to prosper further.

Intense competition in the courier sector is expected to continue. Any benefits from capacity expansion or digital transformation are likely negated by competitors' price-cutting strategies. Several service providers have stated that while the volume is growing, there is stiff competition due to intensifying price competition and more varied service offerings from established and new service providers. In addition, the emergence of logistic start-ups, including local and foreign entities

entering their space is also squeezing their margins. Such situation poses a huge challenge to service providers but offers positive opportunity to raise the bar, especially to the ones who are experiencing the transition from conventional services to the modern one with digital technology solutions.

On the postal side, Pos Malaysia may see its earnings lifted this year on the back of the company's recent postage hike. The increased postage rates for registered mails, commercial mails and small parcels took effect on 1 February 2020. Subsequently, Pos Malaysia's management is seeking to further address its tariff rebalancing mechanism for a sustainable and economical road map given its mailing universal service obligation. The group also aims for an organic top-line growth, driven by e-commerce's rapid expansion fuelling its courier businesses, while managing its cost structure.

NATIONAL DIGITAL IDENTITY

Technological advancements bring about new opportunities and today, technology forms an integral part of our lives. The rise of digital services calls for an imperative need for a safe, secure and protected National Digital Identity (ID) platform.

A comprehensive study to establish a user centric National Digital ID framework for Malaysians commenced in November 2019. The National Digital ID Study Task Force will oversee the 30-week study, which will recommend the implementation model of digital ID in Malaysia. The study's primary focus includes local contextual analysis, implementation strategy, operating model, technology and enabling policies as well as related legislations.

The National Digital ID will be an advanced method of authenticating a user's identity online. However, it is not a substitute for the national registration identity card nor will it be compulsory for everyone. The benefits of having a National Digital ID include, having a secure and trusted digital credential as well as a platform for authentication that can improve convenience, promote inclusivity, reduce cost of access to services, and enhance service delivery to Malaysians where online transactions are concerned.



38 Responses received from IPR 2019 questionnaire.

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LIST OF ABBREVIATIONS

3G	3 rd Generation
4G LTE	4 th Generation Long Term Evolution
5G	5 th Generation

A

ACE	“Access”, “Certainty”, “Efficiency”
ADEX	Advertising Expenditure
ADSL	Asymmetric Digital Subscriber Line
AI	Artificial Intelligence
ARPU	Average Revenue Per User
ASO	Analogue Switch Off
ASP	Applications Service Provider
ASEAN	Association Of Southeast Asian Nations
AVOD	Advertisement-Supported Video On Demand

B

B2B	Business to Business
BAS	Wired Broadband Access Service

C

C&M	Communications and Multimedia
CA	Certification Authority
CAS	Content Applications Services
CASP	Content Applications Service Provider
CCID	Commercial Crime Investigation Department
CFM	Communications and Multimedia Consumer Forum of Malaysia
CMA	Communications and Multimedia Act 1998
CSSR	Call Setup Success Rate

D

DCR	Dropped Call Rate
DEL	Direct Exchange Line
DIAS	Dial Up Internet Access Service
DL	Download
DLL	Digital Leased Line Service
DSL	Digital Subscriber Line

DTH	Direct-to-Home
DTTB	Digital Terrestrial Television Broadcasting
E	
EA	Education and Awareness
ECP	External Content Provider
EDA	E-Commerce Delivery Award
EMF	Electronic Magnetic Fields
F	
FAMA	Federal Agricultural Marketing Authority
FTA	Free-to-Air
FYE	Fiscal Year End
G	
GA	Government Agency
GCC	General Consumer Code of Practice for the Communications and Multimedia Industry Malaysia
GLC	Government-linked Company
GLIC	Government-linked Investment Company
GPRS	General Packet Radio Services
H	
HSBB	High Speed Broadband
I	
iDTV	Integrated Digital TV
ICT	Information and Communications Technology
IoT	Internet of Things
IP	Internet Protocol
IPC	Integrated Parcel Centre
IPTV	Internet Protocol Television
ISP	Internet Service Provider
ITU	International Telecommunication Union
K	
KLIA	Kuala Lumpur International Airport
KYC	Know Your Customer

L

LTE	Long Term Evolution
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M

Mbps	Megabits Per Second
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MCS	Mobile Content Services
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MNC	Multi-National Companies
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MNO	Mobile Network Operator
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MNP	Mobile Network Portability
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MO	Modus Operandi
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MRT	Mass Rapid Transit
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MSA	The Commission Determination on the Mandatory Standard on Access, Determination No. 3 of 2016
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MSAP	The Commission Determination on the Mandatory Standard on Access Pricing, Determination No. 1 of 2017
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MSMCS	Mandatory Standards for the Provision of Mobile Content Services, Determination No. 4 of 2009
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MSQoS	Mandatory Standards for Quality of Service
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MVN	Mobile Virtual Network
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MyIX	Malaysia Internet Exchange
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N

NFCP	National Fiberisation and Connectivity Plan
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NFP	Network Facilities Provider
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NSP	Network Services Provider
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O

OCR	Optical Character Recognition
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OTT	Over-the-Top
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P

PCS	Public Cellular Service
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POS	Point-of-Sale
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PoP	Points-of-Presence
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PSS	Public Payphone Service
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PSTN	Public Switched Telephone Network Service
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Q

QoS	Quality of Service
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QR Code	Quick Response Code
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R

R&D	Research and Development
RAO	Reference Access Offers
RAN	Radio Access Network
RBB	Rural Broadband
RFID	Radio Frequency Identification
RTT	Round-Trip Time

S

SB	Statutory Bodies
SGOV	State Government
SIM	Subscriber Identity Module
SME	Small and Medium Enterprises
SMS	Short Messaging Service
STB	Set Top Box
SUBB	Suburban Broadband
SVOD	Subscription Video On Demand

U

UHD	Ultra High Definition
UHF	Ultra High Frequency
UPU	Universal Postal Union
USD	United States Dollar
USP	Universal Service Provision

V

VAS	Value-Added Services
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Y

YoY	Year on Year
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