INDUSTRY PERFORMANCE REPORT 2024

MALAYSIAN COMMUNICATIONS AND MULTIMEDIA COMMISSION 2024

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CONNECTIVITY POWERING THE NATION

The nation continues to forge ahead with positivity and optimism to fulfil its innovative aspirations for the people while strengthening its position in the industry, regionally as well as globally. The yellow and orange hues that dominate the cover symbolise clarity, communicate dynamism and exude strong positivity.

The symbol for infinity, or the lemniscate symbolises eternity in a variety of contexts. Here it is associated with the spirit of pushing boundaries and dedication to fulfilling immediate and future tasks, product offerings as well as service capabilities and standard – with the processes involved being executed with transparency and a high degree of accountability. Continuous periodic assessments and improvements will be the cornerstone of success of the national digitalisation agenda.

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INSIDE THIS REPORT

CHAIRMAN'S MESSAGE

YBhg. Tan Sri
Mohamad Salim Fateh Din
Chairman MCMC

The Malaysian communications and multimedia (C&M) industry has demonstrated resilience, innovation, and sustained performance amidst evolving market dynamics. The industry continues to experience robust growth, driven by factors such as rising urbanisation, expanded network connectivity, and increasing adoption of digital services.

In 2024, the C&M industry contributed 5.2% of Bursa Malaysia's total market capitalisation, amounting to RM 109.05 billion, with telecommunications remaining the leading contributor. The telecommunications sector recorded a 1.0% increase in revenue to RM 42.55 billion, while capital expenditure rose to RM 4.95 billion, reflecting sustained demand for digital connectivity and the industry's continued commitment to strengthening infrastructure and improving service delivery.

The expansion of 5G networks continues to serve as a catalyst for economic progress and national competitiveness, driving investment, innovation, and productivity across multiple sectors. As adoption grows among enterprises and individuals, the demand for high-speed, reliable connectivity will continue to elevate Malaysia's telecommunications landscape. Aligned with this direction, significant emphasis has been placed on broadening 5G infrastructure to support long-term growth, alongside the continued implementation of the Pelan Jalinan Digital Negara (JENDELA).

As of 31 December 2024, 5G coverage in populated areas reached 82.4%, with 7,485 sites successfully completed. A total of 18.2 million 5G subscriptions were recorded, reflecting a penetration rate of 53.35% per 100 inhabitants, and marking substantial growth from 10 million in January 2024. Similarly, under JENDELA,

> **"We are energised by the immense opportunities brought by emerging technologies that will reshape service delivery and infrastructure, driving Malaysia's economic growth."**

Recorded
18.2 million
5G SUBSCRIPTIONS

fibre coverage was extended to over 9 million premises nationwide, an increase of 4.07 million from the existing 4.96 million premises, surpassing the national target for premises passed.

The postal and courier sector has also undergone significant transformation, driven by the rapid rise of e-commerce and digital trade. Courier companies are embracing digitalisation, leveraging advanced technologies to provide faster, more reliable, and tech-enabled delivery services. With millions of parcels delivered daily, particularly during major online sales campaigns, the sector plays a pivotal role in supporting Malaysia's digital economy. In 2024, Malaysia achieved a major milestone by recording an average of 37.0 parcels per capita, a 41.7% increase from 26.1 parcels in 2023, thereby exceeding the national target of 30 parcels per capita by 2025.

At the same time, MCMC remains committed to empowering local communities by enhancing digital inclusion through the National Information Dissemination Centre (NADI). In 2024, 154 new centres were established, bringing the total number of operational NADI to 1,065, and increasing the number of users to 1.7 million. This growth is largely attributed to the newly introduced NADI Smart Services programme, which delivers a more structured and high-impact approach to community empowerment. With 224,872 participants, NADI Smart Services has proven to be both relevant and sustainable in advancing digital inclusion and community empowerment in line with national aspirations.

Meanwhile, online safety has emerged as a critical concern in today's hyperconnected digital environment. From social media and mobile applications to banking, education, and healthcare, our reliance on internet-connected platforms continues to deepen. While this transformation brings convenience and connectivity, it also exposes users to various cyber threats, including data breaches, identity theft, online scams, and privacy violations. Ensuring online safety now requires more than technical safeguards—it demands a comprehensive regulatory framework that holds tech companies, internet service providers, and other digital stakeholders accountable. Regulation is not about limiting freedom, but about fostering a secure, inclusive, and trustworthy digital ecosystem.

To this end, MCMC has actively engaged stakeholders and subject-matter experts to explore effective approaches to improving online safety. This has led to enhanced regulatory oversight, including the introduction of licensing requirements for social media and internet messaging service providers. Effective 1 January 2025, providers with eight million or more users in Malaysia must obtain an Applications Service Provider Class Licence [ASP(C)] under the Communications and Multimedia Act 1998 to operate in the country. This measure is intended to create a safer digital environment for all Malaysians, especially children and vulnerable groups.

Equally important is the responsible development of Artificial Intelligence (AI). As AI becomes increasingly embedded in critical sectors, its advancement must be guided by strong ethical principles. The growing influence of AI presents both opportunities and risks, making it essential to establish a framework that upholds transparency, fairness, and accountability. In response, MCMC introduced the AI Code of Ethics for the C&M sector, Malaysia's first industry-specific AI code. This landmark initiative addresses key concerns such as algorithmic bias, data privacy, human oversight, and accountability. By aligning with global standards while remaining sensitive to Malaysia's socio-economic context, the Code aims to support innovation, build public trust, and promote the sustainable adoption of AI across the industry.

Looking ahead, we are energised by the immense opportunities brought by emerging technologies that will reshape service delivery and infrastructure, driving Malaysia's economic growth. MCMC will continue to play a pivotal role in shaping the competitive landscape of the C&M industry, positioning Malaysia at the forefront of a hyper-connected world. In addition, MCMC remains steadfast in its commitment towards strong collaboration with stakeholders, enabling us to navigate industry challenges effectively while staying aligned with our long-term vision. Together, we are building a more connected and inclusive future.

With that, it is my honour to present the Industry Performance Report 2024.

An increase of
41.7%
IN PARCELS PER CAPITA

NADI
1.7 million
IN NUMBER OF USERS

EXECUTIVE SUMMARY

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ECONOMIC PERFORMANCE OF THE C&M INDUSTRY

The Malaysian economy continued its recovery trajectory in 2024, with Gross Domestic Product (GDP) recording a commendable growth rate of 5.1%, up from 3.6% in the preceding year. This broad-based expansion, underpinned by resilient household spending and a strengthening labour market, contributed positively to the growing demand for communication and digital services across the nation.

The Communications and Multimedia (C&M) industry, comprising the telecommunications, broadcasting, and postal and courier sectors, played a pivotal role in sustaining this economic momentum. As of 2024, the industry contributed RM109.05 billion, representing 5.2% of Bursa Malaysia's total market capitalisation, with telecommunications remaining the dominant segment.

C&M industry revenue registered a marginal increase of 0.3%, rising to RM48.72 billion. This was largely driven by a 1% growth in the telecommunications sector, reflecting sustained demand for digital connectivity and services. In contrast, the broadcasting sector recorded a 7.1% decline in revenue, attributable to reduced advertising expenditure and the ongoing shift in consumer preferences towards digital and on-demand platforms. Meanwhile, the postal and courier sector sustained its revenue levels despite facing intense competition and elevated operational costs.

Capital expenditure (Capex) increased to RM4.95 billion in 2024, underscoring the industry's commitment to strengthening digital infrastructure and enhancing service delivery. The Capex to revenue ratio stood at 13.4%, supported by continued investments in 4G and 5G network expansion, IT system upgrades, and service innovation.

The performance of the industry was further bolstered by targeted government initiatives aimed at accelerating digitalisation, enhancing nationwide connectivity, and fostering strategic collaboration between the public and private sectors. These initiatives have facilitated infrastructure development, digital skills advancement, and technological innovation, which provides a strong foundation for a long-term growth.

Despite persistent challenges such as market saturation, competitive pricing dynamics, and external economic uncertainties, the C&M industry demonstrated considerable resilience. The continued adoption of emerging technologies and strategic transformation efforts have collectively positioned the industry for sustained recovery and meaningful contribution to Malaysia's evolving digital economy.

STATE OF CONNECTIVITY IN MALAYSIA

The demand for connectivity in Malaysia continued to rise in 2024, underpinned by strategic national initiatives such as JENDELA and MyDIGITAL. These programmes have played a crucial role in accelerating infrastructure development and expanding broadband access nationwide. Under JENDELA, fibre coverage was extended to over 9 million premises, 3,519 new 4G towers were constructed, and 45,913 existing base stations were upgraded. These infrastructure improvements significantly enhanced network availability and service quality across both urban and rural areas. In the meantime, Malaysia's digital economy remains on track to meet its target of contributing 25.5% to national GDP by 2025, driven by widespread digitalisation efforts across industries and the public sector.

As of 2024, total broadband subscriptions reached 49.6 million, reflecting a slight decline of 0.6% compared to the previous year. Fixed broadband subscriptions increased by 5.5% to 4.82 million, demonstrating rising demand for stable, high-speed internet among households and businesses. In contrast, mobile broadband subscriptions declined by 1.2% to 44.78 million, largely due to service consolidation and a growing preference for fixed broadband. Mobile cellular subscriptions also registered a marginal decline to 49.65 million, alongside a continued shift from prepaid to postpaid plans, reflecting evolving consumer preferences and uptake of bundled service offerings.

A key development in 2024 was the expansion and improved performance of 5G services. A total of 7,485 5G sites were deployed, resulting in 82.4% coverage of populated areas nationwide. Network availability exceeded 99.8% throughout the year, while average download speeds consistently surpassed 100Mbps. By year-end, 5G subscriptions rose sharply to 18.2 million, supported by affordable devices, competitive pricing, and increasing user adoption.

Collectively, these advancements underscore Malaysia's continued commitment to building a resilient, inclusive, and future-ready digital ecosystem capable of supporting its broader economic transformation.

CONTENT SERVICES

The content landscape in Malaysia continued to evolve in 2024, as television and video services expanded beyond traditional boundaries to become accessible across a wide range of digital platforms. What was once limited to terrestrial broadcasts is now available via satellite TV, IPTV, and a multitude of streaming services. This transformation has redefined how audiences consume content, offering thousands of hours of movies, news, entertainment, and more, anytime and anywhere.

In response to changing viewer behaviour and to mitigate subscriber migration from Pay TV to streaming platforms, service providers have adopted proactive strategies. These include bundling traditional Pay TV offerings with streaming services at competitive prices to enhance user experience, retain subscribers, and expand market reach. This reflects a broader trend of convergence within the media industry, where content accessibility and platform integration are crucial to remaining competitive in a digital-first environment.

Despite these efforts, total Pay TV subscriptions continued to experience a slight decline in 2024, with a quarter-on-quarter decrease of 0.76%. The Pay TV penetration rate dropped further to 65.4% in Q4 2024, down from 66% in the previous quarter. This decline was driven by several factors, including the growing use of connected devices and a shift in consumer preferences toward digital content consumption.

Consequently, Malaysia's Subscription Video on Demand (SVoD) services have gained momentum, supported by improved broadband access and increasing consumer preference for flexible, on-demand viewing. According to a study by Rakuten Insight, Malaysian users are drawn to SVoD platforms not only for their affordability but also for their extensive content libraries, which far exceed those offered by traditional Pay TV providers.

In terms of advertising expenditure (Adex), free-to-air (FTA) television remained the most preferred channel for marketers in 2024, accounting for RM3.69 billion or 60.51% of total Adex. Digital media also maintained a strong presence, driven by its extensive reach, data-driven targeting, and measurable outcomes. Digital advertising expenditure reached RM0.98 billion, representing 15.98% of total Adex, underscoring the growing reliance on social media, search engines, and other online platforms to drive engagement and marketing effectiveness.

ONLINE & COMMUNITY SERVICES

Malaysia continues to position itself as a leading e-commerce market in Southeast Asia, supported by its dynamic economy and well-developed infrastructure for advanced technologies. The e-commerce sector has experienced robust growth, driven by greater consumer trust in online security, widespread broadband access, high device ownership, reliable delivery systems, a wide variety of affordable products, and favourable demographic trends.

Reinforced by supportive government policies, Malaysia recorded 10.67 million e-commerce users in 2024, with total e-commerce revenue reaching RM1.2284 trillion.

Shopee remained the leading platform, averaging 37 million monthly visits, followed by Lazada (7.6 million), Mudah (5.7 million), and Carousell MY (3.9 million). Other platforms such as Watsons MY, Zalora, eBay MY, PG Mall, Decathlon, and Qoo10 captured smaller market shares, contributing to the sector's diversity and competitiveness.

The National Information Dissemination Centre (NADI) plays a crucial role in bridging digital, knowledge, and socio-economic divides, particularly among underserved rural and urban communities. NADI serves as a key platform for promoting government initiatives such as AI for the People and Cashless Society, while enhancing ICT literacy and encouraging online entrepreneurship to uplift communities. Each NADI centre typically serves a radius of 3 to 5 km, ensuring inclusive access to digital tools and services.

Under the 1 DUN 1 NADI initiative, 188 new centres were established in 2024, bringing the cumulative total to 1,099 nationwide. Of these, 154 were operational as of 31 December 2024, resulting in 1,065 active centres. To complement this expansion, the NADI Smart Services programme was introduced to further empower communities and enhance their overall quality of life.

EXECUTIVE SUMMARY

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POSTAL AND COURIER SERVICES

Malaysia achieved a significant milestone in 2024, reaching an average of 37.0 parcels per capita, a 41.76% increase from 26.1 in 2023. This surpasses the national target of 30 parcels per capita by 2025, reflecting society's increasing reliance on postal and courier services amid the continued growth of e-commerce and online platforms. The surge in parcel volumes highlights a shift in consumer behaviour, where convenience, speed, and accessibility are becoming central to daily transactions. This trend signifies a broader transformation in both consumer behaviour and the national economy, as online commerce becomes an essential component of Malaysia's retail ecosystem.

Pos Malaysia Berhad handled 307.16 million items in 2024, down from 357.41 million in 2023, largely due to the ongoing decline in traditional mail usage. However, traffic for registered items, express items, and ordinary parcels grew significantly. Registered items rose by 13.54% to 23.03 million, express items increased by 19.32% to 1.41 million, and ordinary parcels surged nearly sixfold to 1.72 million in 2024, compared to 290,300 the previous year. Meanwhile, the courier sector experienced robust growth of 43.67%, with item volume rising from 879.15 million in 2023 to 1.26 billion in 2024. Of this total, courier parcel traffic recorded a 47.61% increase, reaching 1.21 billion packages. In contrast, express document traffic declined by 13.60%, totalling 42.21 million items.

The rapid development of postal and courier services has been strongly supported by the government through initiatives under Pelan Accelerator Kurier Negara (PAKEJ). This strategic plan focuses on expanding courier infrastructure to support last-mile delivery and enhance service coverage, particularly in rural and remote areas. In 2024, PAKEJ was elevated to PAKEJ+, a strategic enhancement to integrate sustainability objectives and future-oriented initiatives. This evolution underscores the government's commitment to service efficiency and alignment with national sustainability and environmental goals.

Service providers have also prioritised innovation and sustainability to remain competitive. In 2024, technologies such as cloud computing, fleet management, and route optimisation, and predictive analytics were adopted to enhance operational efficiency and reduce environmental impact. Complementing these efforts, service providers expanded their environmental, social, and governance (ESG) initiatives, including the use of electric vehicles, eco-friendly packaging, and recycling programmes. Collectively, these developments mark a shift towards a more resilient, efficient, and environmentally responsible postal and courier sector.

QUALITY OF SERVICES

MCMC plays a vital role in regulating and monitoring the quality of services in the C&M industry. The Mandatory Standards for Quality of Service (MSQoS), established within the regulatory framework, form part of the measures designed to safeguard consumer satisfaction by setting minimum service quality thresholds, thereby protecting consumers from substandard service delivery.

Effective 1 April 2024, the MSQoS for Wireless Broadband Access Services was revised to ensure the delivery of reliable, high-quality broadband services in line with growing consumer demand. Service providers are encouraged to invest in network enhancements and service innovation by optimising existing resources. A key technical milestone was the activation of the Call Re-Establishment (CRE) feature in the 5G network in December 2023, which addressed handover failures between Digital Nasional Berhad's LTE 700 MHz sites and other Mobile Network Operators' 4G networks. This enhancement significantly reduced instances of dropped calls in 2024.

Notably, non-compliance with the Commission Determination on MSQoS remains a challenge to maintaining service reliability and excellence. In response, MCMC has introduced and enforced various initiatives to identify gaps, implement corrective measures and promote best practices to uphold service standards.

These initiatives include the Integrated Complaint Management System (ICMS) 2.0, a key enforcement and monitoring tool that tracks complaint trends to identify service quality gaps and drive corrective action. Since its launch in June 2023, ICMS has helped reduce consumer complaints by 26% (from 78,754 in 2023 to 58,258 in 2024). The Biannual Complaint Performance Report 2024 further strengthens compliance oversight by assessing providers' responsiveness and remedial measures, with non-compliance subject to penalties under section 242 of the Communications and Multimedia Act 1998. Engagement sessions with the public and stakeholders were also conducted to support the review and enhancement of regulatory instruments.

Industry Forums continue to be instrumental in advancing self-regulation, developing voluntary codes and guidelines, and strengthening collaboration among stakeholders. Through these initiatives, Industry Forums encourage service providers to uphold higher standards, improve accountability and adopt best practices. This collective approach strengthens consumer protection, drives continuous improvement within the C&M sector and contributes to a more dynamic, progressive industry landscape.

Chapter 1:

LICENSING

This chapter reports on the number and growth of licensees, including new and renewed licensees under Individual and Class licences, as well as the shareholding composition by types of Individual licences. It also reports on the monitoring of licensees for rollout compliance from the date of issuance.

CMA LICENCES

480
Individual Licences (2023: 470)

265
Network Facilities Provider
NFC (I)
(2023: 257)

178
Network Services Provider
NSP (I)
(2023: 175)

37
Content Applications Service Provider
CASP (I)
(2023: 38)

586
Class Licences (2023: 567)

18
Network Facilities Provider
NFP (C)
(2023: 15)

18
Network Services Provider
NSP (C)
(2023: 15)

14
Content Applications Service Provider
CASP (C)
(2023: 15)

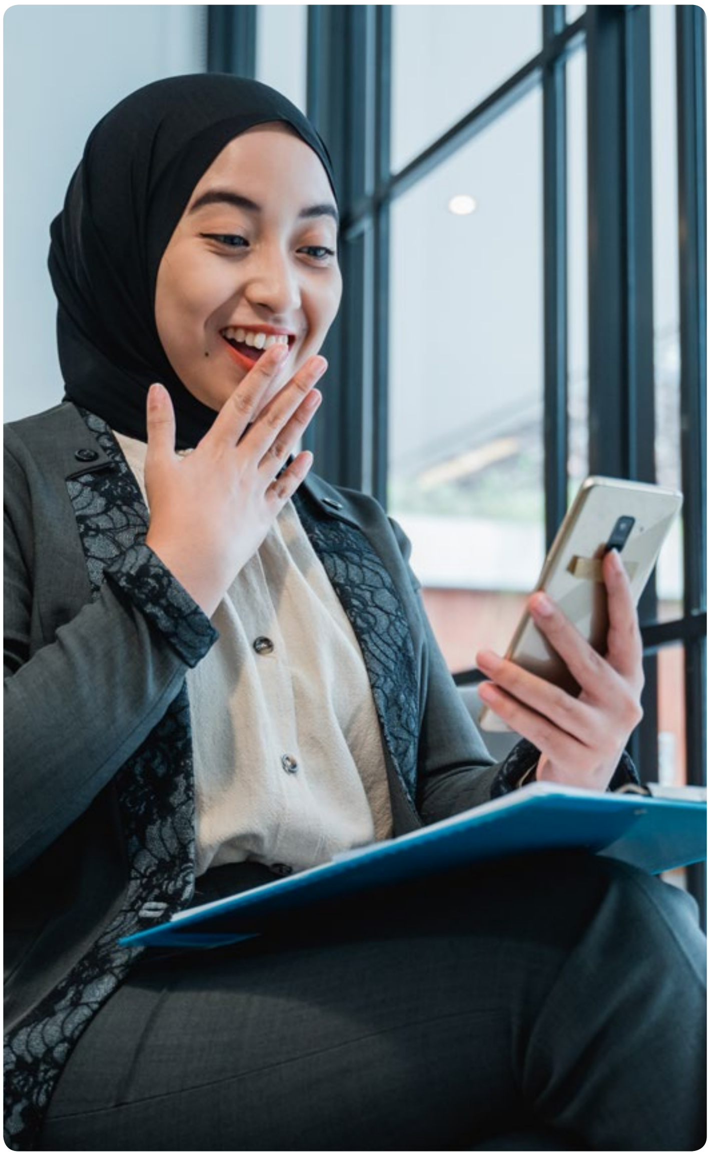
536
Application Service Provider
ASP (C)
(2023: 522)

OVERVIEW

The licensing provision under the Communications and Multimedia Act 1998 (CMA 1998) offers flexibility in licensing structures, adapting to evolving requirements in the rapidly changing Communications and Multimedia (C&M) industry. The convergence of the licensing framework ensures that licences remain technology-and service-neutral, fostering industry expansion and encouraging the efficient utilisation of network infrastructure.

In 2024, the rollout of 5G reached new milestones, with enhanced infrastructure and nearly comprehensive nationwide network coverage. The advancement spurred further market activity, evidenced by a growing number of applications for Network Facilities Provider (NFP) and Network Service Provider (NSP) licences for two consecutive years. Additionally, the adoption of advanced technologies such as the Internet of Things (IoT), Artificial Intelligence (AI), and edge computing is driving demand for innovative service offerings, creating new opportunities within the C&M ecosystem.

The C&M industry continues to grow as 5G technology becomes more deeply integrated into both local and global markets. In 2024, technology remains a significant driver of economic development, creating high-value job opportunities, accelerating innovation, and positioning Malaysia as a regional leader in digital transformation. This progress underscores the importance of a robust and adaptable licensing framework to support industry stakeholders while addressing emerging challenges such as data security, consumer protection, and sustainable growth.



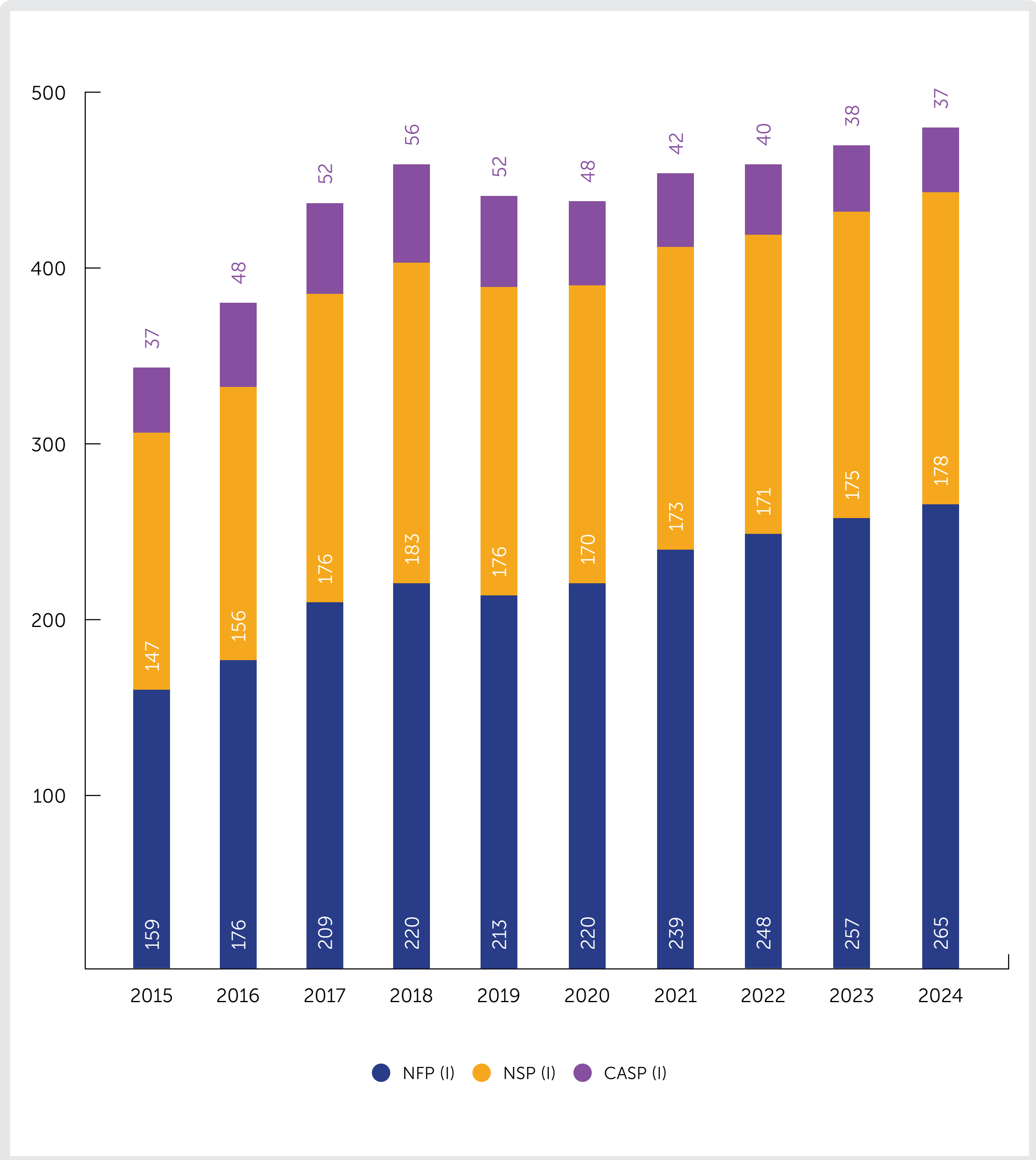
LICENSING PROFILE OVER THE YEAR

INDIVIDUAL LICENCES UNDER THE CMA 1998

As at the end of 2024, Individual licences comprised 265 NFP (I), 178 NSP (I) and 37 CASP (I). In total, there was a 2% increase in the number of licences, bringing it to 480, mainly due to an increase in NFP (I) and NSP (I) licences by 11, partially offset by a decrease in CASP (I) licence by one.

In 2024, 18 new Individual licences were issued, and three were renewed by the Minister of Communications. This includes 13 NFP (I) and 8 NSP (I) licences.

NUMBER OF INDIVIDUAL LICENCES UNDER THE CMA 1998 FROM 2015–2024



Source: *MCMC*
Figure 1.1: *Number of Individual Licences Under the CMA 1998 from 2015–2024*

1

Details of the infrastructure and services offered by new and renewed licenced service providers are outlined below.

NEW AND RENEWED LICENCES IN 2024

Infrastructure and Services	Company	New (N)/ Renewed (R)	NFP (I)	NSP (I)	CASP (I)
Deployment of communications infrastructure to support cellular & broadband services, and the provisioning of bandwidth services	N.U.R Power Sdn Bhd	N	✓	✓	
	Bluebase Solutions Sdn Bhd	N	✓	✓	
	Freshtel Internet Sdn Bhd	N	✓	✓	
	Enfrasys Network Sdn Bhd	N	✓	✓	
Deployment of communications infrastructure to support satellite broadband services, and the provisioning of bandwidth services	N/A				
Deployment of communications infrastructure to support cellular & broadband services	MUIS Holdings Sdn Bhd	N	✓		
	AG Bumi Hartanah Sdn Bhd	N	✓		
	Total Project Management Sdn Bhd	N	✓		
	Eastern Digital Infra Sdn Bhd	N	✓		
	Trintel (M) Sdn Bhd	N	✓		
	Ari Usaha Murni Sdn Bhd	N	✓		
	D'Harmoni Telco Infra Sdn Bhd	R	✓		
	Visi Utama Sdn Bhd	N	✓		
	Pembinaan Sujaman Sdn Bhd	N	✓		
Provisioning of bandwidth services/access application services, and switching services	Edotco Malaysia Sdn Bhd	R		✓	
	Symbio Networks Malaysia Sdn Bhd	N		✓	
	Vodafone Global Enterprise (Malaysia) Sdn Bhd	N		✓	
	Redtone Engineering & Network Services Sdn Bhd	R		✓	
Provisioning of non-subscription broadcasting services	N/A				

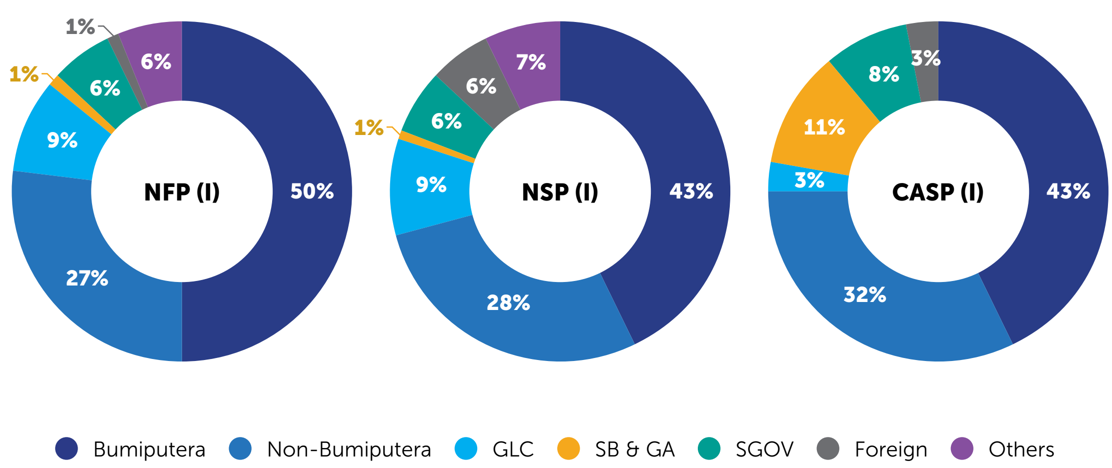
Source: *MCMC*
Figure 1.2: *New and Renewed Licences in 2024*

An analysis of the shareholding composition of Individual licensees under the CMA 1998 showed that 47% of total Individual licences in 2024 are Bumiputera-owned companies, representing the same percentage as the previous year.

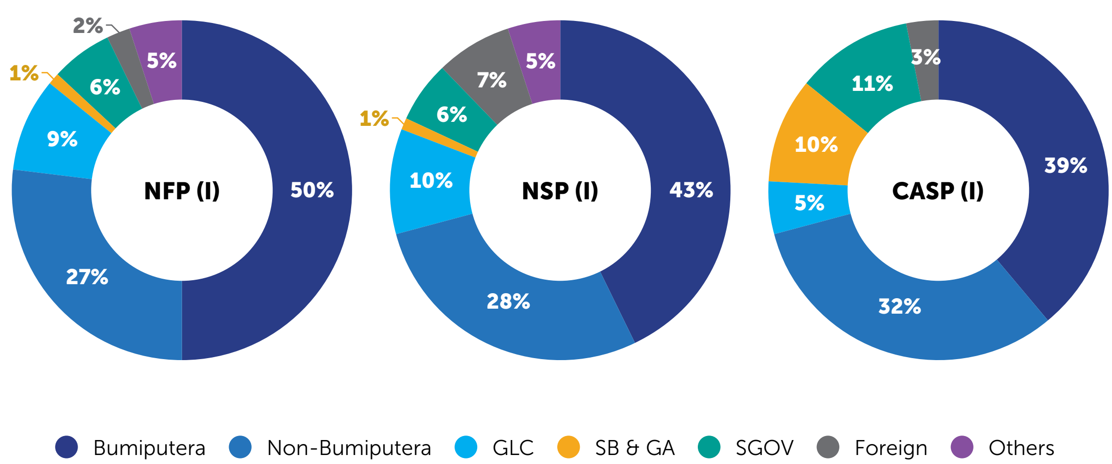
The shareholding composition by types of licence is shown below:

INDIVIDUAL LICENCE – SHAREHOLDING COMPOSITION BY TYPES OF LICENCE (2023 AND 2024)

SHAREHOLDING COMPOSITION 2024



SHAREHOLDING COMPOSITION 2023



Note:
1. *Bumiputera-owned: Company that has 51% or more Bumiputera shares*
2. *Non-Bumiputera-owned: Company that has 51% or more non-Bumiputera shares*
3. *GLC: Government-linked company, that has a primary commercial objective and in which the Malaysian Government has a direct controlling stake. Controlling stake refers to the Government's ability (not just percentage ownership) to appoint Board of Director members, senior management, make major decisions (e.g. contract awards, strategy, restructuring and financing, acquisitions and divestments etc.) for GLCs either directly or through GLICs (Source: www.khazanah.com.my)*
4. *SB & GA: Ownership held directly or indirectly (51% or biggest equity stake) by a Statutory Body or Government Agency*
5. *SGOV: Ownership held directly or indirectly (51% or biggest equity stake) by a State Government*
6. *Foreign-owned: Company that has 51% or more shares held by foreign entities or individuals*
7. *Others: Mixed shareholding, with no particular type of shareholder having a controlling interest in the company*

Source: *MCMC*
Figure 1.3: *Individual Licence – Shareholding Composition by Types of Licence (2023 and 2024)*

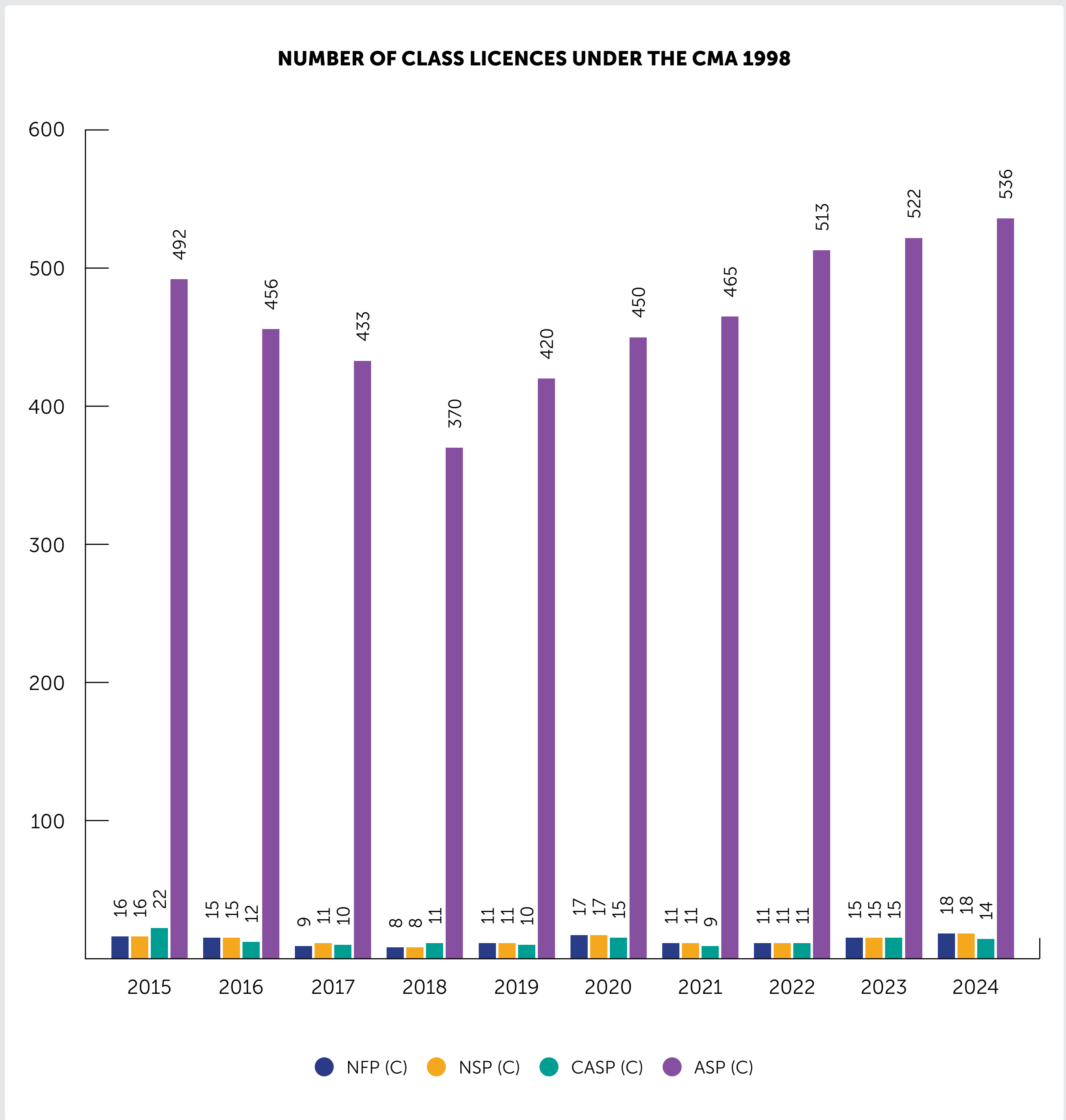
A TOTAL OF 586 CLASS LICENCES WERE REGISTERED BY MCMC IN 2024

Class licences are a light-handed form of regulation, designed to promote industry growth and development by providing easier market access. Based on the continuum from more to less regulation and evolving business landscape in Malaysia, the ASP (C) licences outnumbered all other categories. The number of Class licences is expected to increase over the years, given these services fully utilise available networked infrastructure and reach thresholds in user connections and usage conditions.

In 2024, total of 586 Class licences were registered by MCMC, comprising 18 NFP (C), 18 NSP (C), 14 CASP (C), and 536 ASP (C). The registration of a Class licence is valid for one calendar year; existing licensees are required to submit a new licence application if they intent to continue providing services before the licence expires. Overall, there was an increase of 19 licences to 586 in 2024 (2023:567 licences).

The number of Class licences for all categories from 2014 to 2024 are shown in figure below:

NUMBER OF CLASS LICENCES REGISTERED BY MCMC FROM 2015–2024



Source: *MCMC*
Figure 1.4: *Number of Class Licences Under the CMA 1998*

1

ROLLOUT STATUS IN 2024

Individual licences granted to companies under the Communications and Multimedia Act 1998 are monitored for compliance with special licence condition – Commencement of Deployment/Service(s) – as outlined in Part B 1.2 of their licences. The compliance requirements include:

a. The licensee must commence the provision of facilities or services within the required timeline stated (either 12/24/36/48 months) from the date the licence is issued.

b. However, the Minister may grant an extension of time to the licensee upon appeal and genuine progress being made towards the provision of facilities or services.

As at end of 2024, a total of eight new licensees have complied with the special licence condition, which is Commencement of Deployment/Service(s) to roll out their facilities and/or services within the required timelines from the date the licence was issued. The service and/or facilities providers, types of licence, and facilities and/or services deployed are presented in Table 1 below:

LIST OF NEW LICENSEES DEPLOYED FACILITIES/SERVICES

No.	Licensee Name	Type of Licence	Facilities/ Services Deployed
1.	Darulaman Aset Sdn. Bhd.	NFP (I)	Tower/Poles
2.	ITCO Niaga Sdn. Bhd.	NFP (I)	Tower/Poles
3.	Telbina Technology Sdn. Bhd.	NFP (I)	Tower/Poles
4.	Noble Voice Sdn. Bhd.	NFP (I)	Tower/Poles
5.	M Telco Sdn. Bhd.	NSP (I)	Bandwidth Services
6.	Davex Lumilinx Sdn. Bhd.	NFP (I)	Tower/Poles
7.	Starlink Internet Services Malaysia Sdn. Bhd.	NFP (I) NSP (I)	Earth Stations, Satellite Hubs, Space Stations and Bandwidth Services
8.	Equinix Malaysia Sdn. Bhd.	NSP (I)	Bandwidth Services

Source: *MCMC*
Figure 1.5: *List of New Licensees Deployed Facilities/Services*

PUBLIC PAYPHONE SERVICES

Public Payphone Services (PPS) continue to play a vital role in ensuring that PPS units are strategically installed in areas with limited mobile coverage or where users may not possess mobile phones. This includes locations such as schools and boarding schools, where the installation of PPS units ensures that communication needs are met.

As of 2024, there are 12 PPS providers holding the Applications Service Provider Class [ASP(C)] licence for the provision of PPS. These licensees have been instrumental in maintaining and expanding the availability of PPS across the nation. The list of active and verified PPS providers in 2024 is as follows:

LIST OF PPS PROVIDERS IN 2024

No.	Licensee Name	PPS Brand Name
1.	Creative Call Services	NFP (I)
2.	Elik Gemilang Resources	NFP (I)
3.	Helogang Sdn. Bhd.	NFP (I)
4.	K Dynamic Enterprise	NFP (I)
5.	Kopen Telecommunication Sdn. Bhd.	NSP (I)
6.	Lipson Supplies & Services	NFP (I)
7.	Miraita Enterprise	NFP (I)
8.	Navitel Sdn. Bhd.	NFP (I)
9.	Parso Network Vending Supply	NFP (I)
10.	Pure Spectrum Technologies Sdn. Bhd.	NFP (I)
11.	The 786 Legacy Empire	NSP (I)
12.	Uqaill Teguh Enterprise	NFP (I)
	Total	**12**

Source: *MCMC*
Figure 1.6: *List of PPS Providers in 2024*

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REGULATORY FRAMEWORK FOR INTERNET MESSAGING AND SOCIAL MEDIA SERVICE PROVIDERS

The online environment has rapidly transformed, with over 63.8% of the global population using social media. In Malaysia, online platforms empower underserved communities and contribute to economic growth, but also pose challenges like harmful content, disproportionately affecting children and vulnerable individuals. A UNICEF report in 2019 revealed that 28% of Malaysian children had experienced online violence, while illegal activities such as online gambling and scams led to significant economic losses, with suspicious transaction reports nearly doubling to over RM26 billion between 2019 and 2022.

To address these concerns, MCMC introduced the Regulatory Framework for Internet Messaging and Social Media Service Providers, holding providers accountable for harmful content under the Communications and Multimedia Act 1998 (CMA 1998). The framework aligns with international practices, such as the UK's Online Safety Act 2023, the EU's Digital Services Act 2023, and Singapore's online safety laws. It emphasises user protection through stringent compliance requirements tailored to Malaysia's context, developed through consultations with civil society, law enforcement, and industry stakeholders.

All **Internet messaging service**[1] and **social media service**[2] providers with at least eight million users in Malaysia are required to apply for the ASP(C) licence with MCMC. This is to ensure that relevant large-scale online service platforms operating in Malaysia are subject to regulatory oversight and accountability.

Once licensed by MCMC, the relevant service providers will be obligated to comply with the following:

a. CMA 1998.

b. Standard licence conditions for all ASP(C) licensees.

c. Subsidiary legislation (i.e. Communications and Multimedia (Licensing) Regulations 2000 (LR 2000), Communications and Multimedia (Licensing) (Exemption) Order 2000 (EO 2000), Communications and Multimedia (Universal Service Provision) Regulations 2002.

d. Personal Data Protection Act 2010.

Malaysian online users will not be affected by this regulatory framework, as only relevant service providers with ASP(C) licences from MCMC are required to comply with the requirements of the regulatory framework.

The relevant service providers were given a grace period of five (5) months from 1 August 2024 to apply for the ASP licence and to comply with licensing requirements. The effective date of the licensing requirement is 1 January 2025. Amendments were made to the EO 2000 and the LR 2000 to allow for the implementation of the regulatory framework.

The Government's regulatory approach in enforcing regulation on only Internet messaging service providers and social media service providers is based on the decision to take proportionate steps following risk assessments in addressing online harm, particularly online scams and gambling, sexual grooming involving minors and cyberbullying.

To support its regulatory framework, MCMC introduced the Code of Conduct (Best Practice) for Internet Messaging and Social Media Service Providers on 20 December 2024. The Code provides guidelines for licensed service providers under the CMA 1998 to address harmful online content, including child sexual abuse material (CSAM), phishing, hate speech, and manipulated media. The Code of Conduct will be periodically reviewed to remain relevant and effective in addressing emerging online risks, especially those affecting children.

The key elements of the Code of Conduct include:

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[1] *"Internet messaging service" means an applications service which utilises Internet access service that enables a user to communicate any form of messages with another user.*

[2] *"Social media service" means an applications service which utilises Internet access service that enables two or more users to create, upload, share, disseminate or modify content.*

a. User Safety

Relevant service providers must implement robust systems to manage harmful content while respecting users' rights under Malaysian laws. This includes maintaining local moderation teams, supporting law enforcement, and empowering users with tools for safety, privacy, and reporting.

b. Child Safety Measures

Relevant service providers must ensure child users can safely access platforms by implementing robust age verification measures, providing tools for parents to monitor activities, and empowering children to protect themselves. Tools must be user-friendly, regularly updated, and supported by resources, with regular reviews to address emerging risks. Providers should also support initiatives to educate children on online safety.

c. Risk Assessment and Mitigation

Relevant service providers must proactively identify and mitigate risks of online harm through regular systemic risk assessments, conducted by qualified teams, focusing on user demographics, harmful content, and emerging threats. They must implement measures to address these risks, ensure methods remain updated, and establish an internal assurance function to monitor and report on the effectiveness of these efforts.

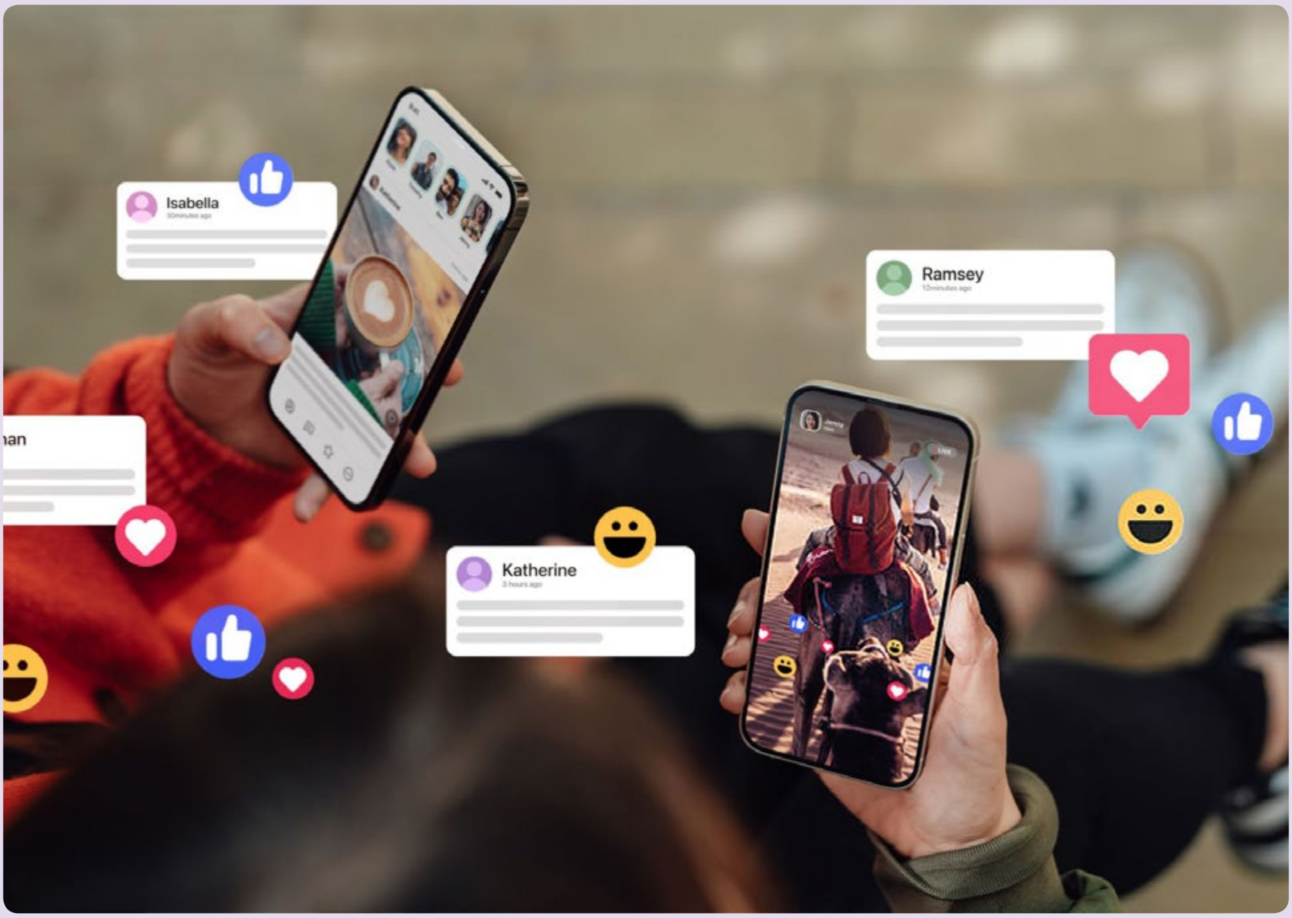
d. Accountability

Relevant service providers must ensure accountability by maintaining records of harmful content removals, conducting regular audits, and submitting half-yearly online safety reports to MCMC. These reports must detail systemic risk assessments, measures to enhance safety, and compliance with the Code of Conduct and Malaysian laws. Providers are also required to publish annual public reports on their safety practices, addressing harmful content management, content moderator training, and reliance on automated tools, while ensuring data privacy in accordance with the Personal Data Protection Act 2010.

e. General Obligations

Relevant service providers are also required to actively support law enforcement in investigations relating to harmful content and to ensure timely data preservation and content removal, as required by law.

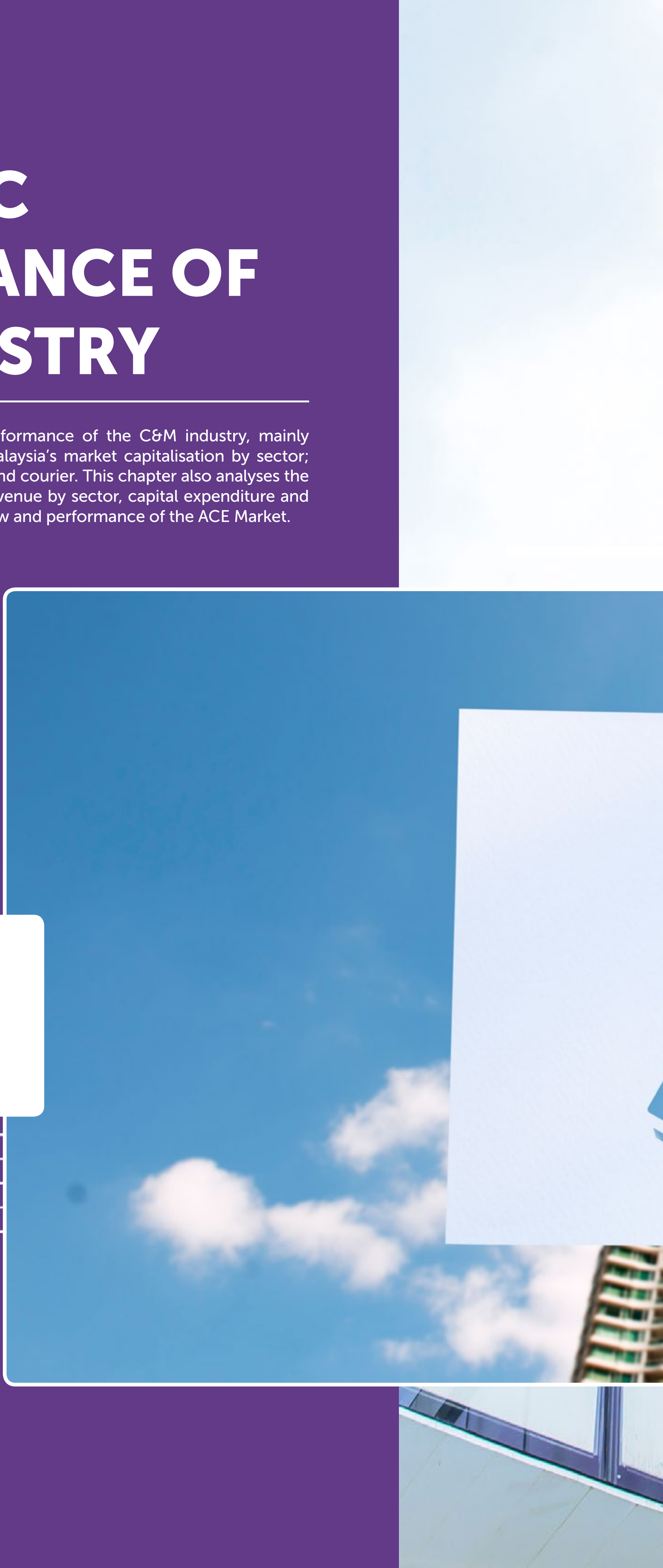
The enforcement of the regulatory framework is a crucial step towards ensuring a safer and more accountable online environment in Malaysia. By enforcing licensing and applying requirements on service providers, it addresses key issues such as online scams and protects vulnerable users, especially children. The framework will provide Malaysian users with safer online platforms, reduced exposure to cybercrime, and clear options for complaints and legal action. Prioritizing user safety and aligning with global best practices, these initiatives create a safer online environment for all, particularly the most vulnerable.



Chapter 2:

ECONOMIC PERFORMANCE OF C&M INDUSTRY

This chapter reports on the economic performance of the C&M industry, mainly on market capitalisation including Bursa Malaysia's market capitalisation by sector; telecommunications, broadcasting, postal, and courier. This chapter also analyses the financial performance, including industry revenue by sector, capital expenditure and ARPU. In addition, it also provides an overview and performance of the ACE Market.



KEY HIGHLIGHTS 2024

MARKET CAPITALISATION

RM109.05 billion

5.2% of Bursa Malaysia market capitalisation of **RM2,080.51 billion**

Source: Bloomberg

- **Telecommunications Sector** — **RM105.91 billion**
- **Broadcasting Sector** — **RM1.97 billion**
- **Postal & Courier Sector** — **RM1.17 billion**

REVENUE

RM48.72 billion

0.3% (2023: RM48.59 billion)

Source: Industry

- **Telecommunications Sector** — **RM42.55 billion**, **1.0%** (2023: RM42.12 billion)
- **Broadcasting Sector** — **RM3.90 billion**, **7.1%** (2023: RM4.20 billion)
- **Postal & Courier Sector** — **RM2.27 billion**, **0.0%** (2023: RM2.27 billion)

CAPITAL EXPENDITURE (CAPEX)

RM4.95 billion

3.4% (2023: RM4.79 billion)

13.4% capex to revenue ratio (2023: 13.0%)

Source: Industry

- **Mobile Service Providers** — **RM3.04 billion**, **18.3%** (2023: RM2.57 billion); **13.1%** capex to revenue ratio (2023: 11.2%)
- **Fixed Service Providers** — **RM1.91 billion**, **13.8%** (2023: RM2.22 billion); **13.9%** capex to revenue ratio (2023: 16.0%)

ACE MARKET

9 companies

Source: Bursa Malaysia, Industry, MCMC

or 4.2% are licensees under the CMA out of the total 215 companies listed on ACE Market.

2

C&M INDUSTRY MARKET PERFORMANCE

The Malaysian economy in 2024 continued its steady recovery momentum, as evidenced by a Gross Domestic Product (GDP) growth rate of 5.1% compared to 3.6% in the previous year[1]. Domestically, economic growth was largely fuelled by robust household spending, supported by favourable labour market conditions and Government policies aimed at assisting households. Externally, exports experienced a recovery, driven by stable global growth and a rise in both tourist arrivals and their expenditure.

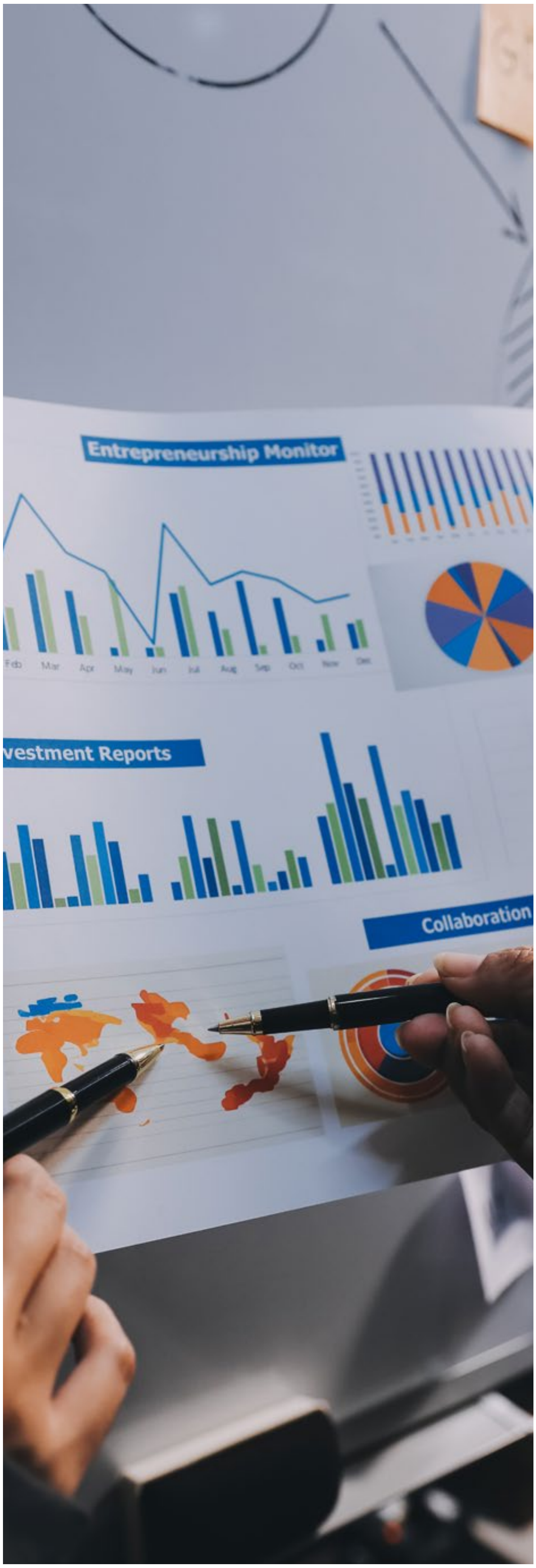
Malaysia experienced a lower inflation rate, primarily influenced by the moderation in inflation for mobile communication services. The decline resulted from intensified competition among network operators, who introduced various promotional pricing strategies, discounts and bundled offers. These initiatives helped alleviate overall price pressures and contributed to a more stable inflation environment. Additionally, the labour market showed significant signs of recovery, with the unemployment rate lower than the pre-pandemic level at 3.2%. This reflects the positive impact of economic reopening and the return of jobs across various industries.

Digital transformation remains a strategic vision for businesses, leveraging technologies such as artificial intelligence (AI), cloud computing and the Internet of Things (IoT), particularly in process automation to enhance operational efficiency. Continued improvements in connectivity and 5G network across the country are enabling the full utilisation of these technologies, driving the demand for telecommunications and multimedia services. Furthermore, Government-led initiatives in the sector are strengthening the momentum of the communication and multimedia industry, ensuring its resilience despite external challenges and global economic turmoil.

The C&M industry represents 5.2% or RM109.05 billion of Bursa Malaysia total market capitalisation of RM2,080.51 billion as at end 2024 (2023: 6.4% or RM114.19 billion).

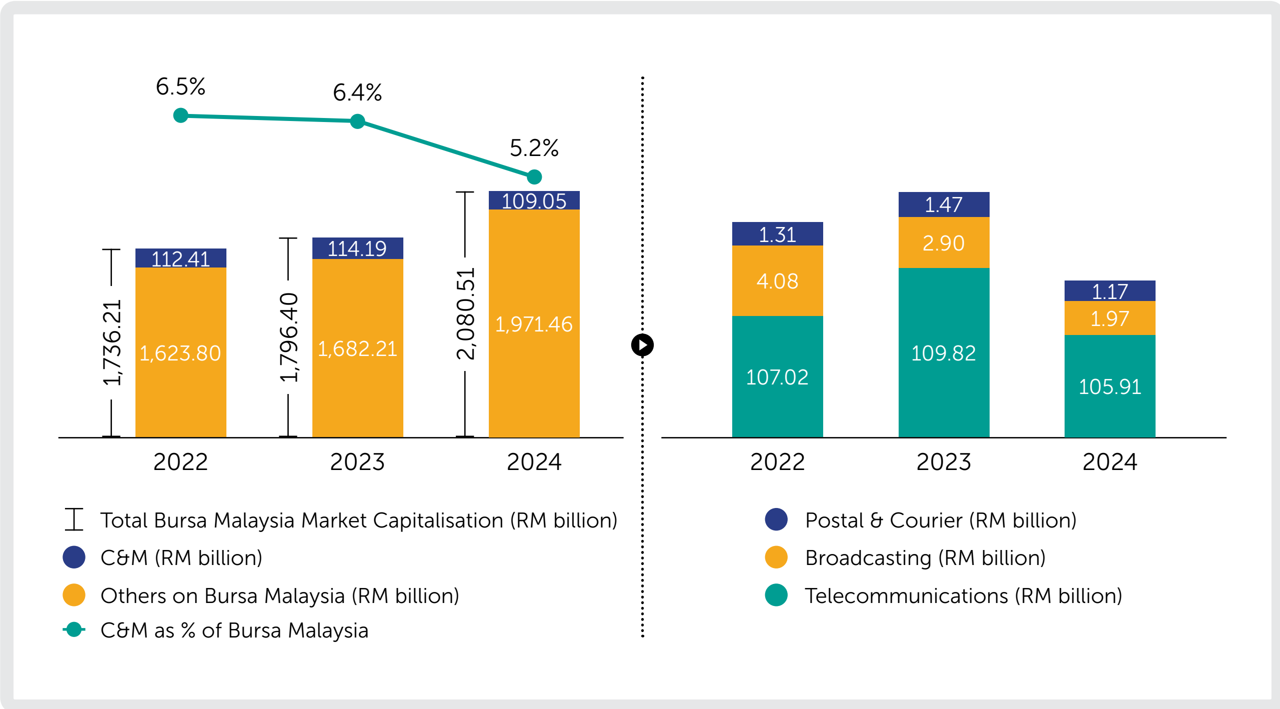
C&M industry represents
5.2% or RM109.05 billion

Bursa Malaysia total market capitalisation of
RM2,080.51 billion



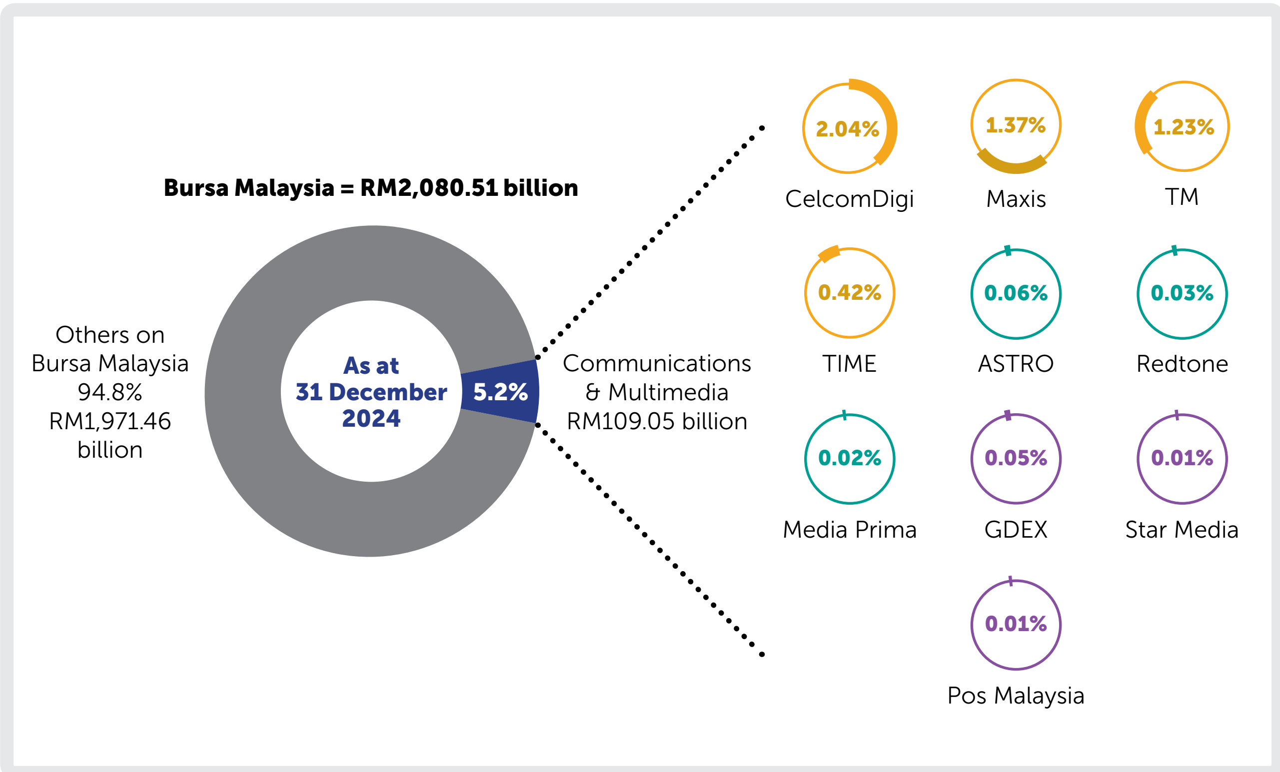
[1] *Bank Negara Malaysia.*

C&M INDUSTRY MARKET CAPITALISATION BY SECTOR 2022–2024



Source: *Bloomberg*
Figure 2.1: *C&M Industry Market Capitalisation by Sector 2022–2024*

C&M COMPANIES CONTRIBUTION TO BURSA MALAYSIA 2024



Source: *Bloomberg*
Figure 2.2: *C&M Companies Contribution to Bursa Malaysia 2024*

C&M COMPANIES MARKET CAPITALISATION 2022–2024

Company	Market Capitalisation (RM billion)			Change (%)	
	2024	2023	2022	2023-2024	2022-2023
CelcomDigi	42.47	47.86	46.93	-11.3%	2.0%
Maxis	28.59	30.15	30.07	-5.2%	0.3%
TM	25.52	21.30	20.63	19.8%	3.2%
TIME	8.67	9.97	9.00	-13.0%	10.8%
Redtone	0.66	0.54	0.39	22.2%	38.5%
Telecommunications	**105.91**	**109.82**	**107.02**	**-3.6%**	**2.6%**
ASTRO	1.17	2.06	3.39	-43.2%	-39.2%
Media Prima	0.51	0.52	0.47	-1.9%	10.6%
Star Media	0.29	0.32	0.22	-9.4%	45.5%
Broadcasting	**1.97**	**2.90**	**4.08**	**-32.1%**	**-28.9%**
GDEX	0.97	1.08	0.84	-10.2%	28.6%
Pos Malaysia	0.20	0.39	0.47	-48.7%	-17.0%
Postal and Courier	**1.17**	**1.47**	**1.31**	**-20.4%**	**12.2%**
TOTAL C&M	**109.05**	**114.19**	**112.41**	**-4.5%**	**1.6%**

Note:
1. *Maxis Bhd (Maxis), CelcomDigi Bhd (CelcomDigi), Telekom Malaysia Bhd (TM), TIME dotCom Bhd (TIME), Redtone Digital Bhd (Redtone), Astro Malaysia Holdings Bhd (ASTRO), Media Prima Bhd (Media Prima), Star Media Group Bhd (Star Media), Pos Malaysia Bhd (Pos Malaysia), GDEX Bhd (GDEX).*
2. *Information on Axiata was not included in 2023 listing following the successful merger between Celcom and Digi, resulting in all of Celcom's operations being consolidated under CelcomDigi.*

Source: *Bloomberg*
Figure 2.3: *C&M Companies Market Capitalisation 2022–2024*

The market capitalisation for the telecommunications sector is recorded at RM105.91 billion in 2024 (2023: RM109.82 billion), contributed by CelcomDigi, Maxis, Telekom Malaysia, TIME and Redtone. There are some reservations in investor sentiment over this sector outlook given the challenging domestic scenarios which includes market saturation and uncertainty surrounding the outcome of 5G Dual Network (5GDN) policy.

Growth potential is constrained by market saturation, with mobile penetration nearing 150% and a declining rate of new household creation for fixed broadband. However, as more service providers enter the market, intensified competition is fostering innovation and driving the expansion of convergence offerings, such as bundled mobile, broadband and digital services. This results in enhanced service quality and a wider range of value-added services tailored to evolving connectivity needs among consumers. Lingering uncertainty surrounding the outcome of 5GDN continues to impact the outlook for earnings, capital spending and dividends for mobile network operators (MNOs)[2]. The network rollout depends on preparatory steps which include successful finalisation of partnerships, selection of vendors and secure financing. Stock valuations and market sentiment for MNOs are anticipated to improve once these matters are resolved.

Telekom Malaysia's market capitalisation grew by 19.8% to RM25.52 billion in 2024 (2023: RM21.30 billion). In 2024, Telekom Malaysia witnessed a continuous growth in its fixed broadband subscriber base, fuelled by the holistic ecosystem that meets customers' needs and lifestyle through the Unifi brand. Telekom Malaysia remains steadfast in its efforts to unlock opportunities in new growth areas by leveraging advanced technologies and innovative solutions. The group continues to support the Government in driving digital transformation, empowering businesses to enhance their competitiveness and enabling communities to thrive in a digitally connected world.

Redtone recorded a market capitalisation growth by 22.2%, RM0.66 billion in 2024 (2023: RM0.54 billion). The group has achieved a notable increase in revenue, driven by a strategic focus on niche market segments, continuous innovation and robust cost management. Additionally, the effective execution of key projects which include advancing the deployment of digital services nationwide in collaboration with Government agencies has contributed to enhanced operational efficiency and profitability.

The broadcasting sector experienced a decrease in market capitalisation by 32.1%, RM1.97 billion in 2024 (2023: RM2.90 billion). The sector experienced moderated growth in advertising expenditure (Adex) for the year, due to reduction in advertising spend by major advertisers impacted by consumer boycotts[3]. This scenario has led many brands to either withdraw or scale back their advertising campaigns to avoid further negative exposure. The trend of cord-cutting will likely continue, driven by growing adoption of cheaper alternative medium and rising dominance of OTT platforms (e.g. Netflix and Disney+).

The postal and courier sector posted a decline in market capitalisation by 20.4% to RM1.17 billion in 2024 (2023: RM1.47 billion). The global macroeconomic environment poses significant challenges for the postal and logistics sector, including rising labour costs, regulatory constraints and a decreasing reliance on traditional mail and parcel services due to shifting consumer preferences and rapid adoption of digital alternatives. However, Malaysia's courier, express and parcel market is expected to experience significant growth by 2025, driven by rising e-commerce demand and ongoing improvements in infrastructure[4]. By leveraging the policies and initiatives introduced by the Government, industry players can create more opportunities in expanding their businesses through digitalisation, which can drive innovation, improve operational efficiency and enhance customer experiences.

[2] *Kenanga Market Insights*
[3] *Business Times*
[4] *Business Today*

CELCOMDIGI AMONG TOP 10 IN MARKET CAPITALISATION

As shown in Figure 2.4, while the financial and utilities sectors continue to lead the market capitalisation ranking, the telecommunications sector is led by CelcomDigi. In 2024, CelcomDigi maintained its position at 7th place since the previous year, while Maxis moved up to 16th place and Telekom moved down a notch to 19th place, respectively.

TOP 10 MARKET CAPITALISATION 2023–2024

	2024	2023
1	**MAYBANK** RM123.57 billion	**MAYBANK** RM107.22 billion
2	**PUBLIC BANK** RM88.51 billion	**PUBLIC BANK** RM83.27 billion
3	**CIMB** RM87.98 billion	**CIMB** RM62.39 billion
4	**TNB** RM86.85 billion	**TNB** RM58.10 billion
5	**IHH HEALTHCARE** RM64.34 billion	**PETRONAS CHEMICALS** RM57.28 billion
6	**HONG LEONG BANK** RM44.57 billion	**IHH HEALTHCARE** RM53.11 billion
7	**CELCOMDIGI** RM42.47 billion	**CELCOMDIGI** RM47.86 billion
8	**PETRONAS CHEMICALS** RM41.36 billion	**HONG LEONG BANK** RM40.97 billion
9	**PRESS METAL ALUMINIUM** RM40.37 billion	**PRESS METAL ALUMINIUM** RM39.63 billion
10	**YTL POWER INTERNATIONAL** RM36.29 billion	**PETRONAS GAS** RM34.43 billion

Note:
1. *Top 10 largest stocks were from the largest 30 companies on FTSE Bursa Malaysia KLCI Index by market capitalisation.*
2. *Malayan Banking Bhd (Maybank), Public Bank Bhd (Public Bank), Tenaga Nasional Bhd (TNB), Petronas Chemicals Group Bhd (Petronas Chemicals), Top Glove Corp Bhd (Top Glove), IHH Healthcare Bhd (IHH Healthcare), Hartalega Holdings Bhd (Hartalega), CelcomDigi Bhd (CelcomDigi), Hong Leong Bank Bhd (Hong Leong Bank).*

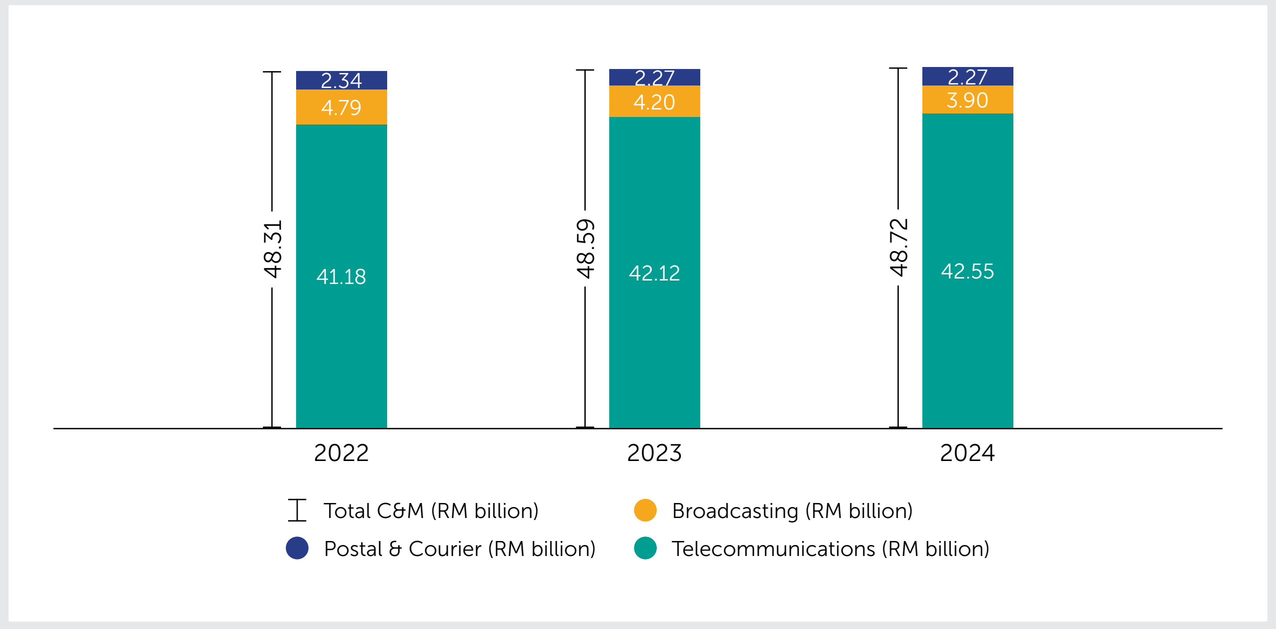
Source: *Bloomberg*
Figure 2.4: *Top 10 Market Capitalisation 2023–2024*

C&M INDUSTRY FINANCIAL PERFORMANCE

The C&M industry in Malaysia managed to deliver a stable performance throughout 2024, supported by the recovery of economic activity throughout the country. Positive labour market conditions, moderating inflation and rebound in exports are among the key drivers to recovery across sectors despite continuous challenges from the global macroeconomic environment[5].

The industry has received significant support from the Government under Budget 2024[6] to enhance digital connectivity, drive the digital economy, strengthen cybersecurity, as well as to support the development of local talent and creative projects. As a result, the sector has expanded its service offerings to meet the increasing demand for high-quality and reliable telecommunication services for both businesses and individuals. The revenue for C&M industry increased by 0.3% to RM48.72 billion in 2024 from RM48.59 billion in 2023, indicating an optimistic trend towards recovery.

DOMESTIC C&M INDUSTRY REVENUE 2022–2024



Source: *Industry*
Figure 2.5: *Domestic C&M Industry Revenue 2022–2024*

Following the rising trend since 2022, the telecommunications sector gradually improved in 2024. Continuous developments and collaborations between the Government, service providers and academia led to an increased demand for connectivity services and a 1.0% rise in telecommunications sector revenue, reaching RM42.55 billion in 2024 (2023: RM42.12 billion). The broadcasting sector experienced a declining trend since 2022, contributed by cost-cutting strategies by global brands and growing competition from digital platforms, which resulted to a decrease of 7.1% to RM3.90 billion in 2024 (2023: RM4.20 billion). For the postal and courier sector, the revenue remained constant at RM2.27 billion in 2024 (2023: RM2.27 billion) due to ongoing fierce competition in the saturated market and rising labour costs.

[5] *Bank Negara Malaysia*
[6] *Bernama*

TELECOMMUNICATIONS SECTOR

The telecommunications industry experienced steady revenue growth in 2024, driven by rising customer demand, expansion of digital services and strategic initiatives undertaken by service providers. Strong subscriber growth across mobile and fixed broadband services, alongside increased adoption of enterprise solutions contributed to improving overall industry performance despite competitive challenges.

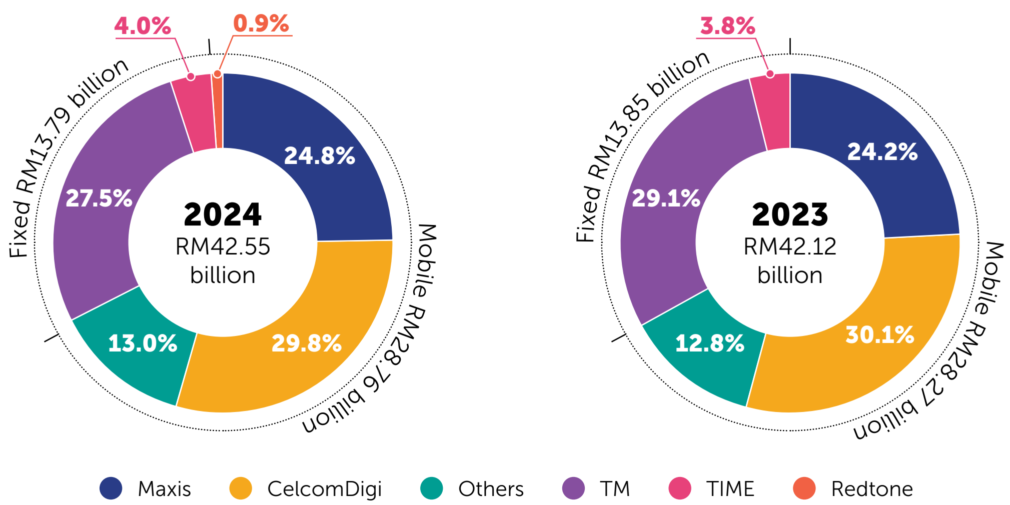
Revenue from mobile services mainly contributed by the postpaid segment, which saw steady increases in subscriber numbers. This growth was supported by enhanced data offerings, targeted customer campaigns and improved roaming plans. While prepaid revenue declined due to fewer one-time SIM card acquisitions and a shift away from unprofitable segments, operators focused on delivering more value by increasing data speeds and offering larger data packages to retain customers.

Fixed broadband remained a significant driver of revenue growth, with continued expansion in home fibre subscriptions. Remote work, online education and digital entertainment continue to drive demand for high-speed internet, contributed to higher customer acquisitions. Furthermore, enterprise revenue saw notable improvements as businesses increasingly relied on digital transformation initiatives. This droves demand for managed services, cybersecurity solutions and network infrastructure upgrades.

In response to Government incentives and initiatives aimed at improving digital accessibility, telecommunications providers have introduced more affordable products and service offerings to their customers. These include budget-friendly broadband plans, device bundles and higher-value data packages that make connectivity more accessible to a wider consumer base.

These developments led to an increase in telecommunications sector revenue by 1.0%, to RM42.55 billion in 2024 (2023: RM42.12 billion). From the total, 68% were contributed by mobile service providers, while the remaining 32% were contributed by fixed service providers. Mobile service providers recorded an increase of 1.7% in revenue to RM28.76 billion in 2024 (2023: RM28.27 billion), while fixed service providers' revenue declined 0.4% to RM13.79 billion (2023: RM13.85 billion).

TELECOMMUNICATIONS SECTOR REVENUE 2023–2024

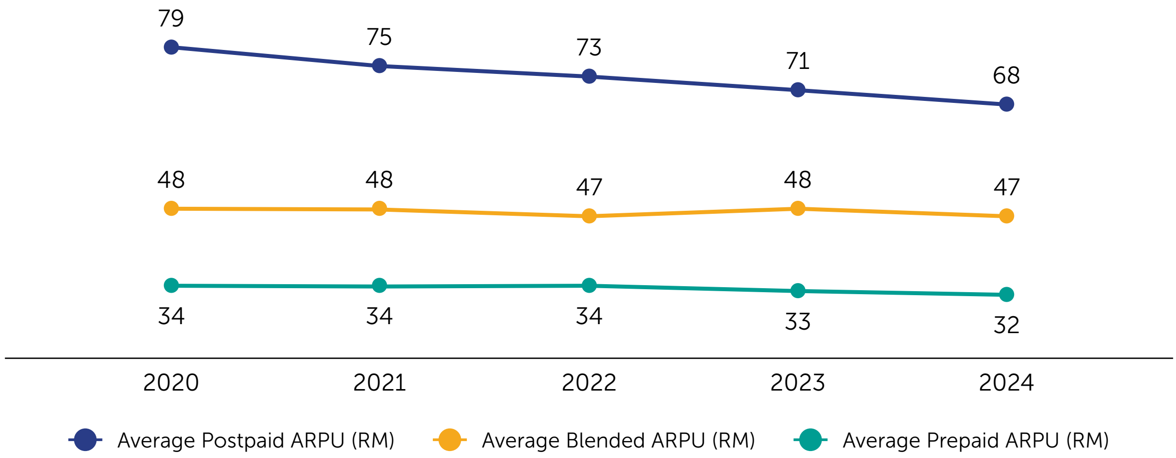


Note: *Others comprise non-public listed mobile operators and MVNOs. Revenue includes both retail and wholesale revenue.*

Source: *Industry*
Figure 2.6: *Telecommunications Sector Revenue 2023–2024*

AVERAGE REVENUE PER USER (ARPU)

AVERAGE MOBILE ARPU 2020–2024



Note: *ARPU from major public listed companies only.*

Source: *Industry*
Figure 2.7: *Average Mobile ARPU 2020–2024*

Prepaid ARPU experienced a slight decline from the previous year, averaging at RM32 per month in 2024. Prepaid-to-postpaid migration is ongoing but at a slower pace, helping reduce prepaid subscriber churn. Operators are also refining their prepaid customer base by eliminating inactive users and focusing on high-value, long-term subscribers.

In the postpaid segment, ARPU faces downward pressure due to two key factors: (i) consumers opting for more affordable plans amid inflationary concerns and (ii) an increase in new users subscribing to lower-cost entry-level plans[7]. This has shifted the postpaid ARPU down to RM68 in 2024. Despite this, subscriber growth remains positive, driven by competitive and budget-friendly postpaid offerings.

EBITDA AND EBIT MARGINS

The industry saw EBIT[8] growth in 2024, driven by increased revenue from premium services, cost optimisation and improved operational efficiencies. The absence of major impairment charges from the previous year also contributed to improved profitability for service providers. However, EBITDA[9] declined, primarily due to higher costs associated with ongoing network modernisation and infrastructure upgrades. Additionally, some mobile operators incurred a one-time expenses such as voluntary separation schemes (VSS) aimed at restructuring the workforce to improve long-term efficiency.

The focus on operational efficiency and enhanced service offerings helped in strengthening EBIT, which reflects a higher resilience in a competitive market. In 2024, the telecommunications sector's total EBITDA margin averaged 36.3% (2023: 40.0%) and EBIT margin averaged 22.4% (2023: 21.1%). Both mobile and fixed service providers' EBITDA margins were above 30% level in 2024. On the EBIT front, mobile service providers' EBIT margin recorded at 20.2% while fixed service providers' EBIT margin stood at 23.9% in 2024.

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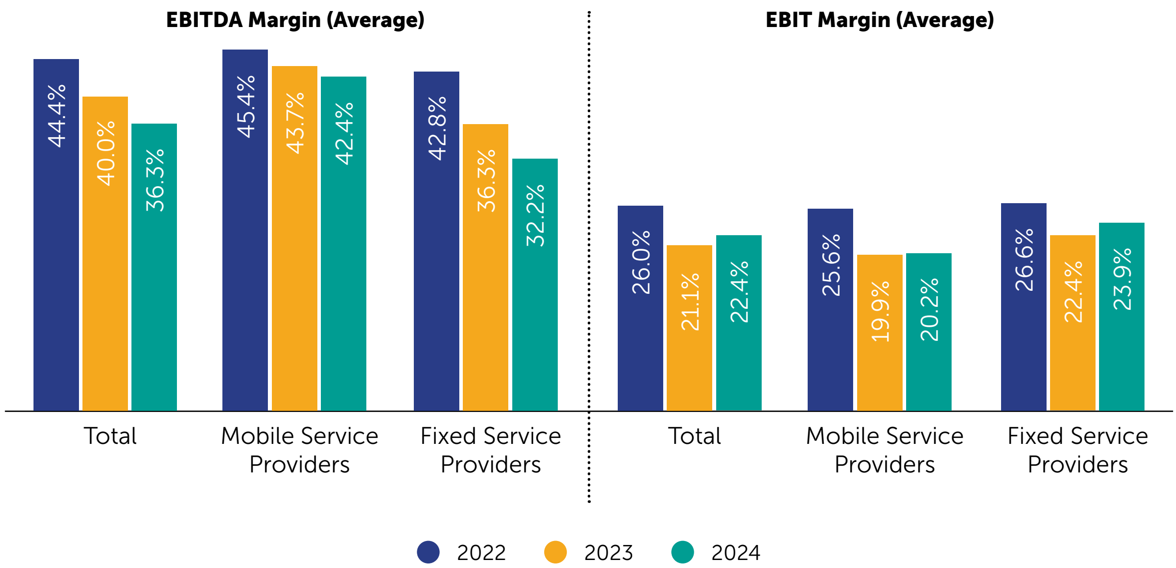
[7] *Kenanga Insight.*
[8] *EBIT refers to Earnings Before Interest and Tax, also known as operating profit.*
[9] *EBITDA refers to Earnings Before Interest, Tax, Depreciation and Amortisation.*

EBITDA AND EBIT MARGIN 2022–2024



Note: *Note: Margins from major public listed companies only*

Source: *Industry*
Figure 2.8: *EBITDA and EBIT Margin 2022–2024*

CAPITAL EXPENDITURE (CAPEX)

The telecommunications industry continues to make substantial capital expenditure (Capex) investments to enhance network infrastructure, improve service quality and accelerate digital transformation. These investments are crucial in expanding connectivity, optimising operational efficiency and strengthening Malaysia's position as a key digital hub. By focusing on various strategic areas, telecommunications companies aim to meet increasing consumer demand and enable the adoption of emerging technologies.

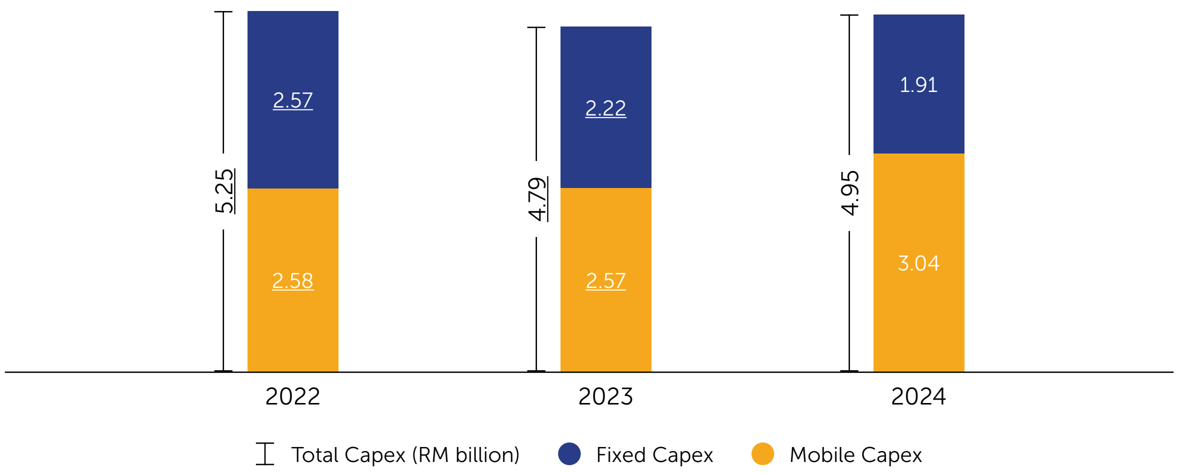
One of the key areas of investment has been network expansion and coverage enhancement. In 2024, telecommunications companies have successfully increased the coverage in populated areas to 98.7% (2023: 97.1%) for 4G and 82.4% for 5G (2023: 80.2%). This was achieved through the deployment of new network sites, upgrades to existing infrastructure and fiberisation of base stations. These efforts ensure broader connectivity and higher quality network performance for users across the country.

In addition to expanding coverage, the industry has focused on enhancing network capacity to accommodate the rising demand for data. Business growth and increasing user activity have necessitated significant upgrades to support both 4G and 5G services, with companies investing in technologies such as VoLTE (Voice over LTE) and improving gaming experiences to deliver a seamless and reliable connection. The rollout of 5G remains a central investment focus, with capital directed towards core connectivity, backhaul improvements and Radio Access Network (RAN) expansion. These enhancements are crucial for maintaining service quality while adapting to evolving user expectations.

Beyond network infrastructure, telecommunications companies are actively modernising their IT systems to improve operational efficiency and enhance the customer experience. Investments in platforms for billing, customer relationship management and operations support are streamlining business operations and service delivery while facilitating network automation. These improvements align with global best practices and aim to create a more resilient and responsive network environment.

In 2024, the telecommunications sector Capex saw an increase to RM4.95 billion (2023: RM4.79 billion), translating into Capex to revenue ratio of 13.4% (2023: 13.0%). From the total Capex, 61% (RM3.04 billion) were from mobile service providers, while the remaining 39% (RM1.91 billion) came from fixed service providers. Telecommunication service providers have strengthened their fixed and mobile offerings, digital solutions and 5G networks through careful allocation of Capex investment. Improvement in network speed and coverage are aligned with JENDELA's national aspirations, providing customers, partners and communities with extensive opportunities for future development. These are essential steps towards achieving sustained growth and supporting the nation's vision of nurturing digital societies, businesses, industries and Government services.

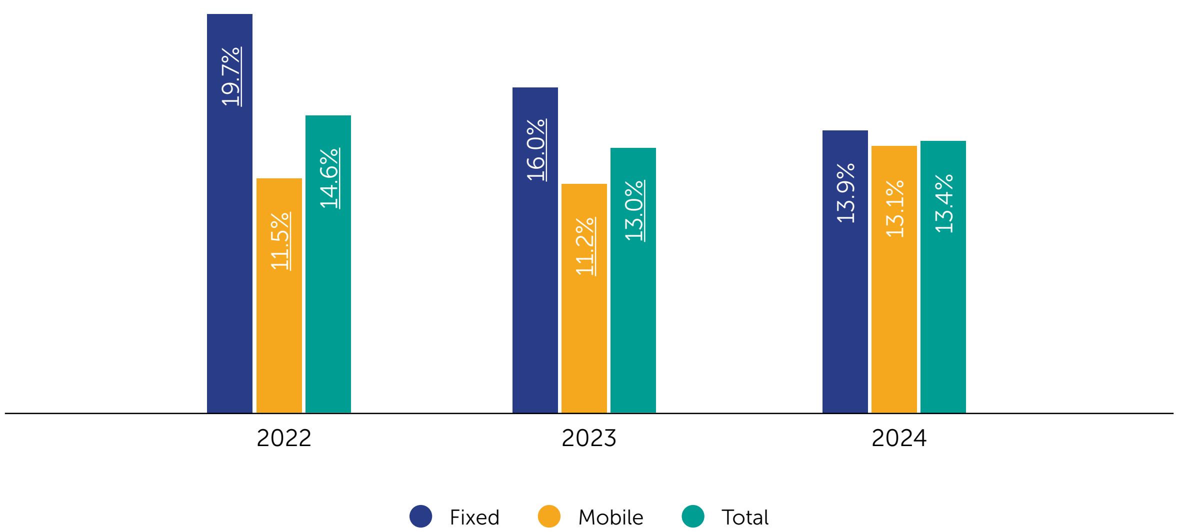
CAPEX 2022–2024



Note: *Capex from major public listed companies only.*

Source: *Industry*
Figure 2.9: *Capex 2022–2024*

CAPEX TO REVENUE RATIO (CAPITAL INTENSITY)



Note: *Capital intensity from major public listed companies only.*

Source: *Industry*
Figure 2.10: *Capex to Revenue Ratio (Capital Intensity)*

Malaysia telecommunications sector spending was 13.4% of revenue for 2024, which is below the 15.4%[10] global average. In other countries such as the Philippines, their telecommunications sector capital intensity has experienced a decreasing trend from 51.8% in 2022 to 42.5% in 2024. Mobile operators in the country have shifted their focus toward optimising capital utilisation and achieving positive free cash flow, with an emphasis on expanding coverage in geographically isolated areas and ensuring uninterrupted access to digital solutions. Indonesia, Thailand, and Singapore allocated 21.6%, 12.3% and 8.1% of their revenue respectively into Capex over the same period, as shown in Figure 2.11.

After witnessing significant investment in 5G network expansion across the Asia Pacific (APAC) region in recent years, the telecommunications sector Capex intensity in these markets has moderated in 2024[11]. This outcome resulted from the shift of focus towards monetising 5G investments, with service providers aiming to generate returns on their capital expenditures. Furthermore, the gradual rollout of 5G has fallen below expectations in some countries as earlier network generations like 4G continue to play a crucial role in the connectivity landscape for the foreseeable future. However, a reduced capital intensity might indicate a more cautious investment strategy, potentially paving the way for a more sustainable long-term growth.

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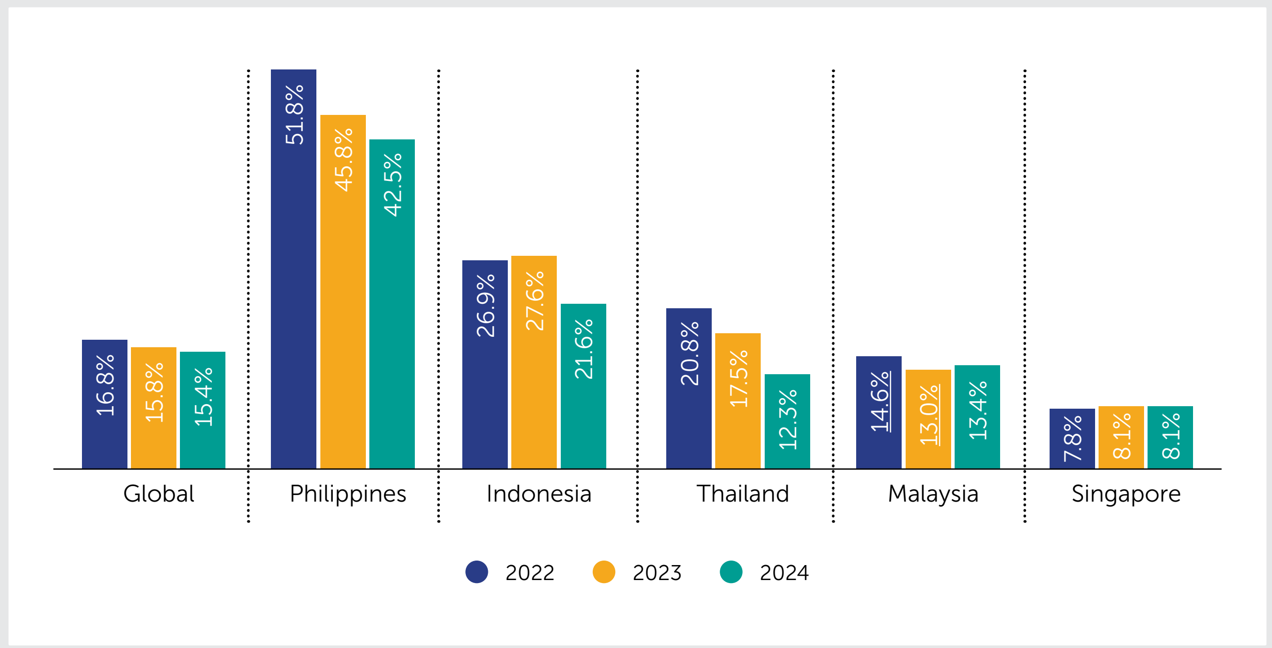
[10] *OMDIA, Communications Provider Revenue and Capex Tracker.*
[11] *GSMA, The Mobile Economy Asia Pacific 2024.*

TELECOMMUNICATIONS CAPITAL INTENSITY IN SOUTHEAST ASIA 2022–2024



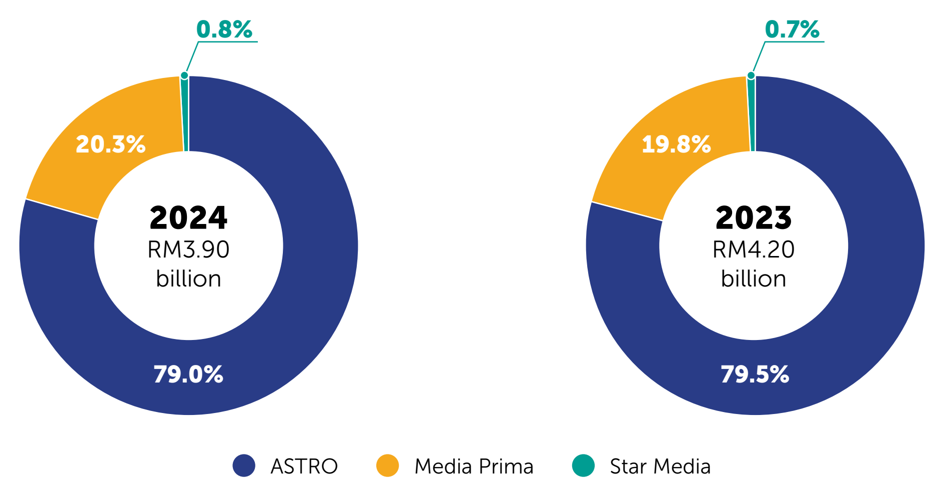
Source: *Malaysia – Industry, MCMC; Other countries – Omdia*
Figure 2.11: *Telecommunications Capital Intensity in Southeast Asia 2022–2024*

BROADCASTING SECTOR

The broadcasting sector saw a revenue decline in 2024, driven mainly by lower subscription numbers and a reduction in advertising expenditure (Adex). This decline in TV Adex was largely influenced by cost-cutting strategies from global brands, which led to reduced advertising budgets across television networks. In addition to this, the growing competition from digital platforms and economic uncertainties further pressured the industry's revenue performance. As consumers continue to shift towards on-demand content and digital streaming platforms, traditional broadcasters face significant challenges in retaining viewership and advertising revenue. These situations affected revenue streams for the broadcasting sector, resulting in a decline of 7.1% to RM3.90 billion in 2024 (2023: RM4.20 billion).

In an effort to remain competitive, broadcasters are focusing on several strategic initiatives. These include attracting new customers through better content offerings and more attractive value packs, strengthening adjacent businesses to diversify revenue streams and reducing legacy costs to improve operational efficiency. These steps aim to help the sector stay competitive, especially against global peers that are embracing digital transformation more aggressively.

BROADCASTING SECTOR REVENUE 2023–2024



Note:
1. *Media Prima excludes print/publishing revenue.*
2. *ASTRO revenue adjusted by calendar year.*
3. *Star Media refers to radio broadcasting revenue only.*

Source: *Industry*
Figure 2.12: *Broadcasting Sector Revenue 2023–2024*

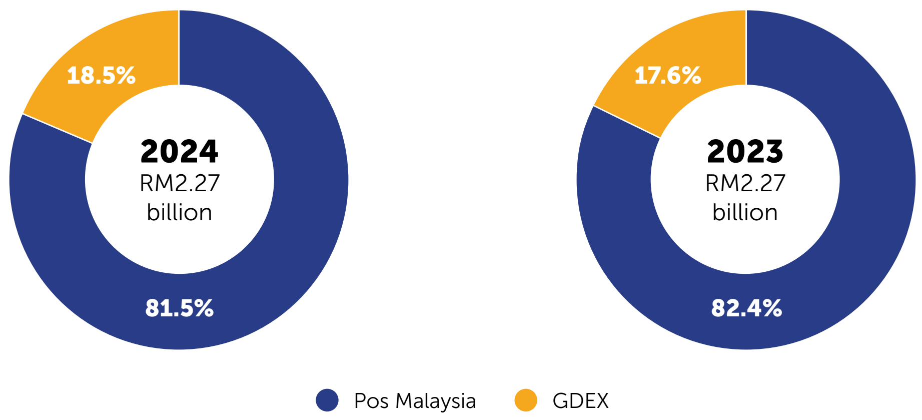
POSTAL AND COURIER SECTOR

The postal and courier industry faced multiple challenges in 2024, which had a significant impact on its operations and profitability. One of the main hurdles was the rising operational costs, particularly due to the Universal Service Obligation (USO). This required companies to ensure postal service coverage across all areas including less profitable rural regions, which led to increased financial strain on service providers. Additionally, the highly competitive market saw aggressive pricing strategies among numerous players, further squeezing margins and making it difficult to sustain profitability.

Despite these obstacles, the industry recorded an increase in parcel volume, reflecting the growing demand for e-commerce and delivery services. This growth was effectively managed through outsourcing freelance riders to handle fluctuating delivery volumes and optimising logistics with automated parcel handling systems like AutoHub. Companies also monitored and optimised vehicle usage through systems like iFleet to ensure efficient transportation management. Furthermore, adjustments in the courier incentive schemes helped boost workforce productivity and improve service efficiency.

By focusing on cost optimisation and streamlining operational processes, the industry managed to maintain a stable revenue, which is remained at RM2.27 billion in 2024 (2023: RM2.27 billion). This demonstrates the sector's ability to adapt to market challenges while ensuring consistent service quality and operational efficiency.

POSTAL AND COURIER SECTOR REVENUE 2023–2024



Source: *Industry*
Figure 2.13: *Postal and Courier Sector Revenue 2023–2024*

ACE MARKET OVERVIEW AND PERFORMANCE

The ACE Market stands for "Access, Certainty, Efficiency." The ACE Market is an alternative capital-raising market for small and medium-sized companies with growth prospects, and which are looking to push for more capital through public listing exercises. Prior to 2009 it was known as MESDAQ (Malaysian Exchange of Securities Dealing and Automated Quotation) Market.

In 2024, there were 215 companies listed on ACE Market. From the total, 9 companies or 4.2% are licensees under the CMA. The Individual and Class licensees listed on ACE Market for the year 2024 are shown below.

Company (ACE-Listed)	**Licensee** (The company or subsidiary of ACE-listed company)	**Type of Licences***
XOX Technology Berhad (formerly known as M3 Technologies (Asia) Berhad)	XOX Technology Berhad (formerly known as M3 Technologies (Asia) Berhad)	ASP (C)
M N C Wireless Berhad	M N C Wireless Bhd Moblife.TV Sdn Bhd	ASP (C)
MTouche Technology Berhad	Mtouche International Sdn Bhd	ASP (C)
N2N Connect Berhad	N2N Global Solutions Sdn Bhd NGN Connection Sdn Bhd	ASP (C)
Privasia Technology Berhad	Privanet Sdn Bhd Privasat Sdn Bhd	ASP(C), NFP (I) & NSP (I)
XOX Berhad	XOX Com Sdn Bhd XOX Technology Berhad (formerly known as M3 Technologies (Asia) Berhad)	ASP (C)
SMRT Holdings Berhad	N'osairis Technology Solutions Sdn Bhd	ASP (C)
Binasat Communications Berhad	Binasat Digital Sdn Bhd	NFP (I) & NSP (I)
Sedania Innovator Berhad	Sedania As Salam Capital Sdn Bhd	ASP (C)

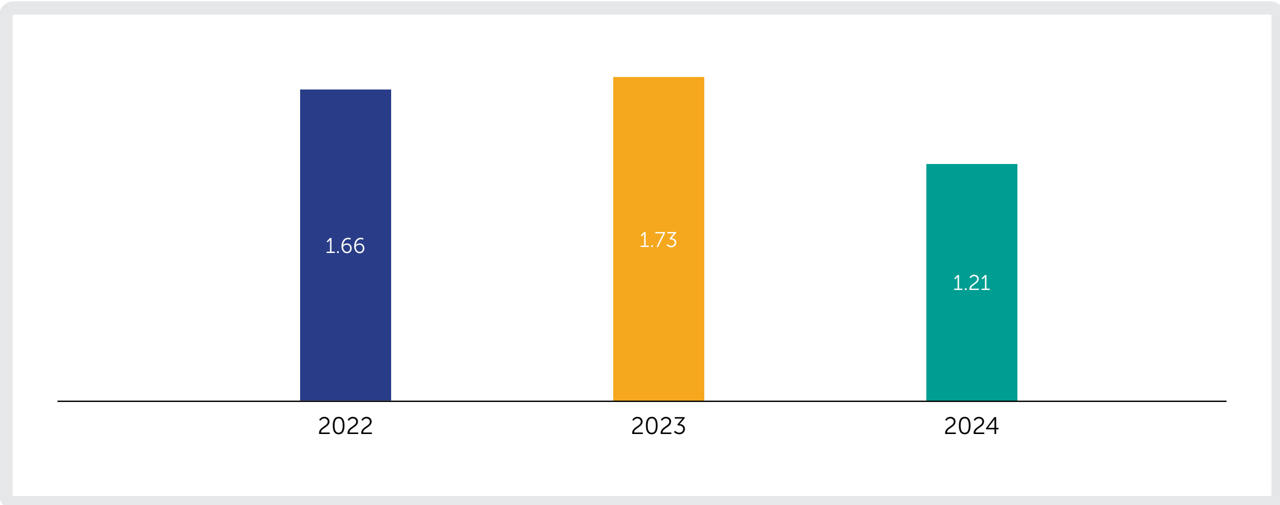
** ASP – Applications Service Provider; NSP – Network Service Provider; NFP – Network Facilities Provider; I – Individual; C – Class*

Source: *Bursa Malaysia ACE Market, Industry, MCMC*
Figure 2.14: *Licensees on ACE Market 2024*

In 2024, market capitalisation for the CMA licensees listed on ACE Market recorded a decrease of 30.1% to RM1.21 billion (2023: RM1.73 billion), with a decline of 59.5% in revenue to RM0.89 billion (2023: RM2.20 billion). Despite the decline in market capitalisation and revenue for licensees on the ACE Market in 2024, there are several positive takeaways. Some companies have successfully transitioned to the Main Market, reflecting their growth and ability to meet stricter listing requirements. This move enhances their credibility, strengthens investor confidence and provides access to a broader pool of institutional investors.

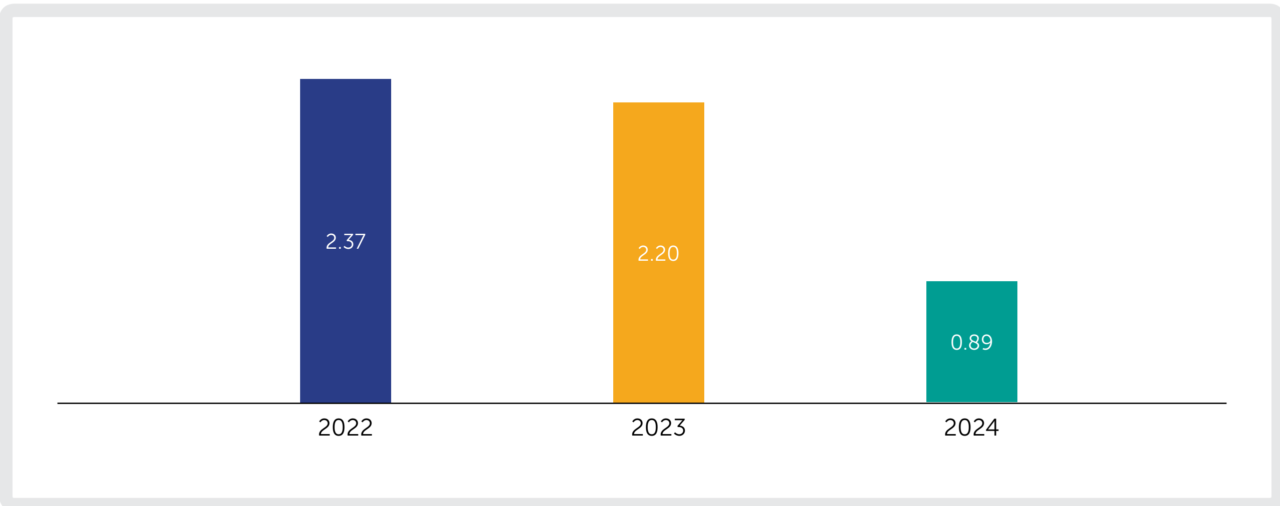
Despite declining revenue, companies listed on the ACE Market continue to attract investor interest, reflecting optimism for future growth. The ability to remain publicly traded suggests that investors still see potential in these businesses, whether through expansion efforts, digital transformation initiatives, or long-term profitability improvements. This optimism indicates confidence in the sector's ability to adapt, innovate and capitalise on emerging opportunities.

LICENSEES ON ACE MARKET: MARKET CAPITALISATION 2022–2024 (RM BILLION)



Source: *Bloomberg*
Figure 2.15: *Licensees on ACE Market: Market Capitalisation 2022–2024 (RM billion)*

LICENSEES ON ACE MARKET: REVENUE 2022–2024 (RM BILLION)



Source: *Industry*
Figure 2.16: *Licensees on ACE Market: Revenue 2022–2024 (RM billion)*

Chapter 3:

SERVICES AND CONNECTIVITY

This chapter presents an overview of connectivity services in Malaysia, covering broadband, fixed, and cellular services. It focuses on the development of these services by detailing subscription numbers, market share by service providers, and penetration rates. The chapter also highlights key government initiatives aimed at enhancing high-speed broadband and digital connectivity, particularly through JENDELA.

KEY HIGHLIGHTS 2024

BROADBAND SUBSCRIPTIONS

49.60 million
0.6%
(2023: 49.91 million)

Mobile Broadband
44.78 million
1.2%
(2023: 45.33 million)

Fixed Broadband
4.81 million
5.3%
(2023: 4.57 million)

MOBILE CELLULAR SUBSCRIPTIONS

49.66 million
1.0%
(2023: 50.14 million)

145.4% penetration rate per 100 inhabitants
(2023: 148.7%)

Prepaid
33.91 million
4.2%
(2023: 35.31 million)

Postpaid
15.75 million
5.8%
(2023: 14.83 million)

5G DEVELOPMENT

Number of 5G Sites Deployed
7,485

Coverage in populated areas
2024: 82.4%
2023: 80.2%

Subscription
2024: 18.20 million
2023: 8.23 million

BROADBAND AND ECONOMIC GROWTH

Countries around the world are increasingly benefiting from productivity gains and efficiency improvements driven by the widespread adoption of mobile services and digital technologies. Innovations such as fifth generation (5G) networks, the Internet of Things (IoT), and artificial intelligence (AI) have emerged as key drivers of economic development and transformation. In 2024, mobile technologies and related services accounted for approximately 5.8% of global gross domestic product (GDP), contributing around USD 6.5 trillion to the global economy. This figure is projected to grow significantly, reaching nearly USD 11 trillion, or 8.4% of global GDP, by 2030[1]. These projections underscore the expanding role of digital infrastructure in shaping economic outcomes worldwide.

In parallel, global internet adoption has continued to rise steadily. By the end of 2024, approximately 58% of the world's population, equivalent to 4.7 billion individuals, were using mobile internet services[2]. This marks an increase of 2.2 billion users since 2015, reflecting a strong and sustained trend towards greater digital connectivity across the globe.

Similar trends are observed in Asia and the Association of Southeast Asian Nations (ASEAN), where the telecommunications sector continues to grow, driven by ongoing investments in network infrastructure, data centres, and digital innovation. These advancements have enabled broader access to digital services and contributed to higher internet usage across the region. Between 2019 and 2023, the average number of internet subscribers in ASEAN rose from 74.8 to 77.2 per 100 inhabitants[3]. This indicates that in most ASEAN member states, more than half of the population now has internet access, underscoring the region's commitment to digital inclusion and leveraging technology for economic and social advancement.

In Malaysia, demand for connectivity continued to rise in 2024, driven by national initiatives such as the Pelan Jalinan Digital Negara (JENDELA) and the Malaysian Digital Economy Blueprint (MyDIGITAL). Through strategic partnerships with service providers, JENDELA has significantly improved mobile and fixed broadband coverage nationwide. At the same time, Malaysia's digital economy remains on track to achieve its target of contributing 25.5% to national GDP by 2025[4], supported by initiatives that promote digital transformation, talent development, and technology adoption across industries. Collectively, these efforts are accelerating digital adoption and fuelling sustained demand for connectivity throughout the country.

BROADBAND IN MALAYSIA

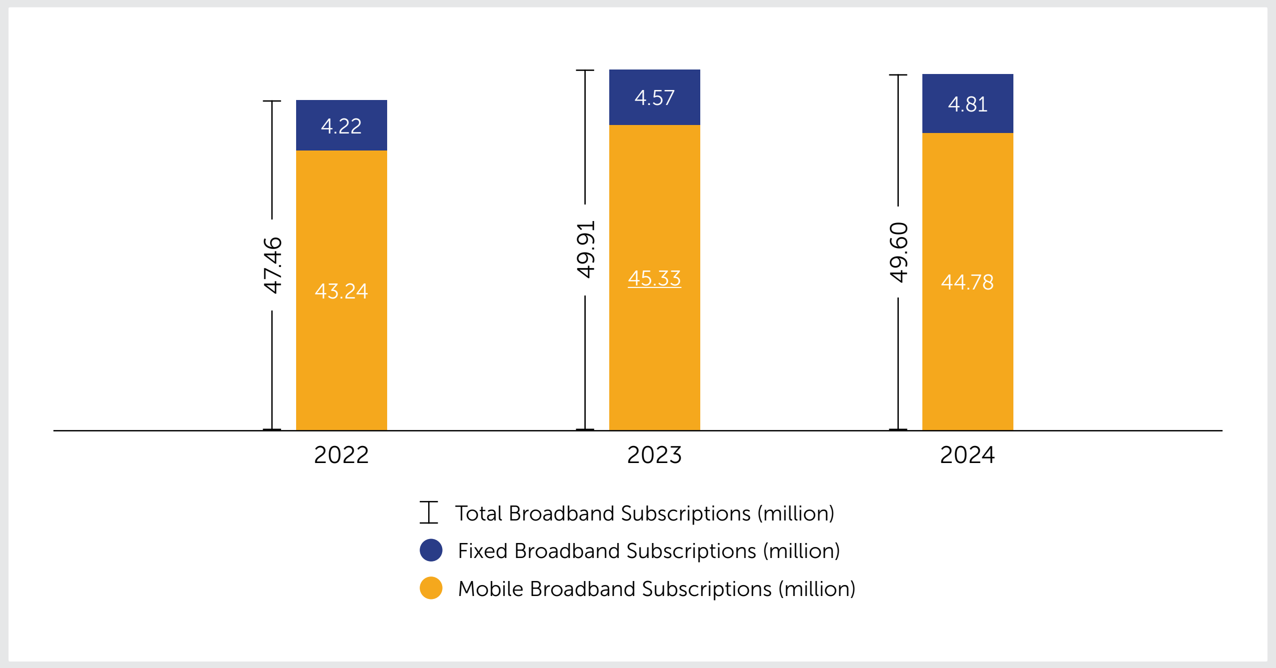
There has been a consistent growth trend in fixed broadband subscriptions in Malaysia, while mobile broadband experienced a slight decline. Fixed broadband subscriptions increased by 5.3%, rising from 4.57 million in 2023 to 4.81 million in 2024. In contrast, mobile broadband subscriptions declined by 1.2% to 44.78 million (2023: 45.33 million). As a result, total broadband subscriptions fell marginally by 0.6% to 49.60 million (2023: 49.91 million). The upward trajectory of fixed broadband reflects rising demand for high-speed internet access, driven by its superior quality, increased usage at home, government infrastructure support, and a shift in consumer preferences towards greater reliability and performance.

Telekom Malaysia (TM), the country's largest fibre network provider, recorded over three million fixed broadband subscriptions. As the nation's digital connectivity provider, TM remains committed to unlocking new growth opportunities and supporting the government in empowering businesses, communities, and public institutions within the digital economy. As Malaysia's Convergence Champion, TM integrates broadband, mobile, content, telephony, and lifestyle services through its Unifi brand, offering a holistic ecosystem tailored to customers' evolving needs. Through innovative service bundles, TM delivers a personalised customer experience that combines digital-first convenience with the power of AI and advanced analytics.

Fixed broadband penetration stood at 48.7% in 2024, indicating that nearly half of all premises in Malaysia now have access to fixed broadband services. For mobile broadband, many users maintain more than one subscription, which is reflected in the penetration rate exceeding 100%. While connectivity remains essential to daily life, both fixed and mobile broadband penetration rates recorded slight declines compared to the previous year. Service providers remained focused on enhancing their networks and enterprise solutions, with AI and 5G continuing to serve as main priorities[5]. However, intense market competition has driven product convergence and contributed to saturation. Consequently, many consumers have opted to consolidate multiple subscriptions into single, more comprehensive plans, or shift their reliance to fixed broadband and Wi-Fi to optimise value and service quality.

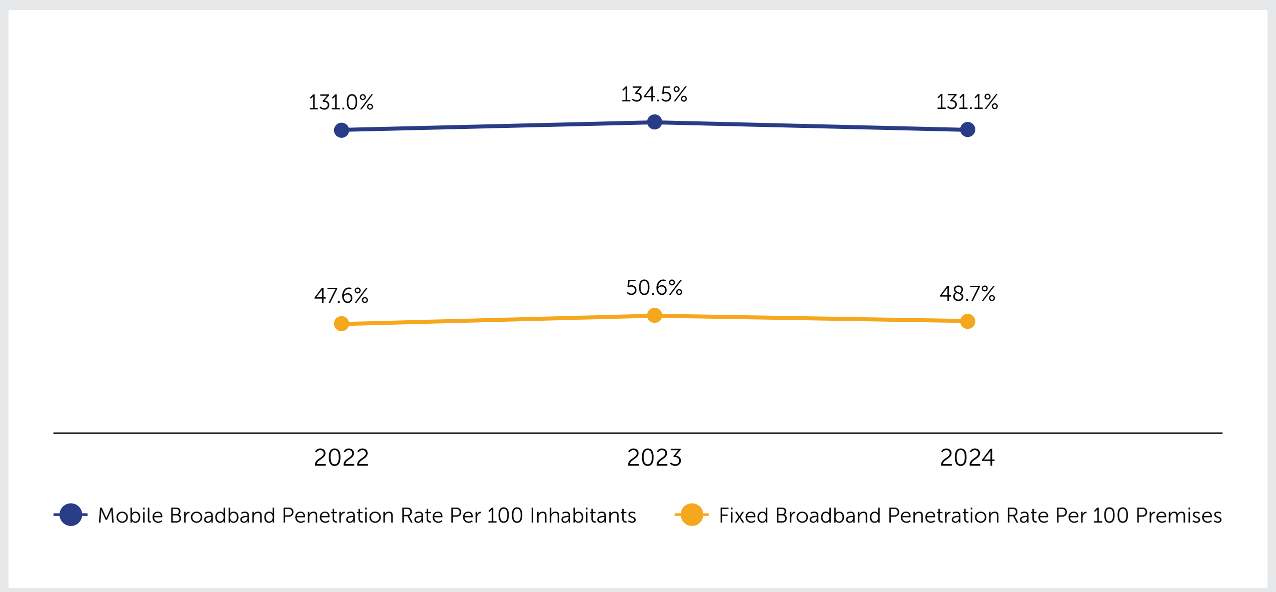
[1] *GSMA, The Mobile Economy 2025.*
[2] *GSMA, The Mobile Economy 2025.*
[3] *ASEAN Key Figures 2024.*
[4] *MDEC.*
[5] *Globaldata ASEAN Enterprise Telecom Updates H2 2024 Part 1- Indonesia and Malaysia: Major Developments in AI, 5G, and APIs.*

BROADBAND SUBSCRIPTIONS 2022–2024



Source: *MCMC*
Figure 3.1: *Broadband Subscriptions 2022–2024*

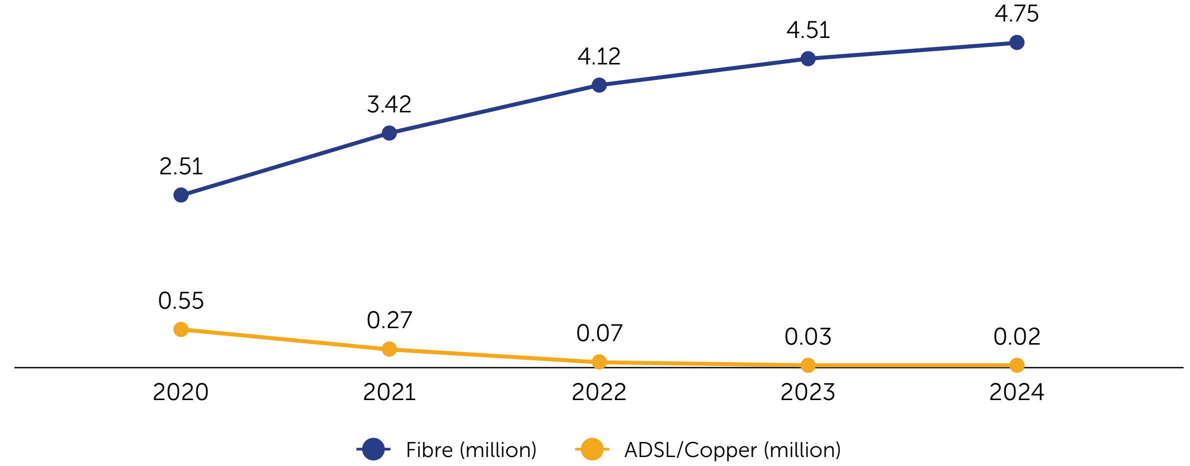
BROADBAND PENETRATION RATES 2022–2024



Source: *MCMC*
Figure 3.2: *Broadband Penetration Rates 2022–2024*

FIXED BROADBAND

ADSL AND FIBRE SUBSCRIPTIONS 2020–2024



Note: *The figure does not include other technologies, such as Very High-speed Digital Subscriber Lines (VDSL), satellite, or fixed wireless, due to the marginal representation of their numbers.*

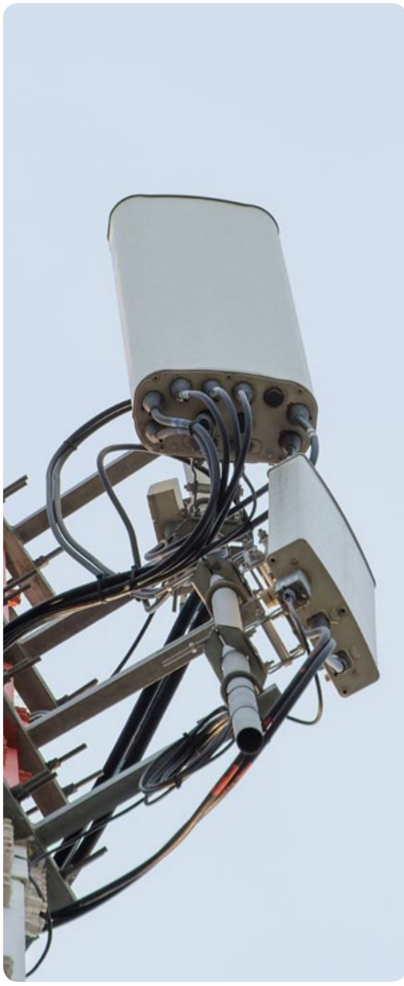
Source: *MCMC*
Figure 3.3: *ADSL and Fibre Subscriptions 2020–2024*

Government initiatives such as JENDELA have successfully improved the country's broadband infrastructures. Fibre coverage has been made widely available across populated areas with significant improvement in service quality, encouraging consumers to migrate to fibre. As a result, fibre subscriptions grew by 2.6% to 4.75 million in 2024, reflecting a compound annual growth rate (CAGR) of 17.3% from 2020 to 2024.

Asymmetric Digital Subscriber Line (ADSL) relies on legacy copper networks and phone lines to connect premises to the internet. In contrast to fibre, ADSL offers higher latency and slower performance. In 2024, ADSL subscriptions declined by 24.6% to 0.02 million (2023: 0.03 million), as consumers continued to transition to fibre, leading to a steady reduction in ADSL usage.

The increase in fixed broadband subscriptions in Malaysia has been driven by a combination of competitive pricing strategies, product innovation, and growing demand for reliable high-speed connectivity. Service providers introduced entry-level plans at lower price points to attract new subscribers, particularly in price-sensitive segments. For existing customers, value was enhanced through speed upgrades, larger data allocations, and bundled devices.

Enterprise demand also played a key role, with businesses increasingly relying on fixed connectivity to support cloud services, IoT solutions, and data-intensive operations. The expansion of data centres and international investments in Malaysia's digital infrastructure further fuelled this demand. Despite pricing pressures and intense market competition, operators remained focused on improving customer experience, launching targeted campaigns, and implementing retention strategies. These efforts contributed to attracting new subscribers while reducing churn, resulting in steady growth in the fixed broadband segment.



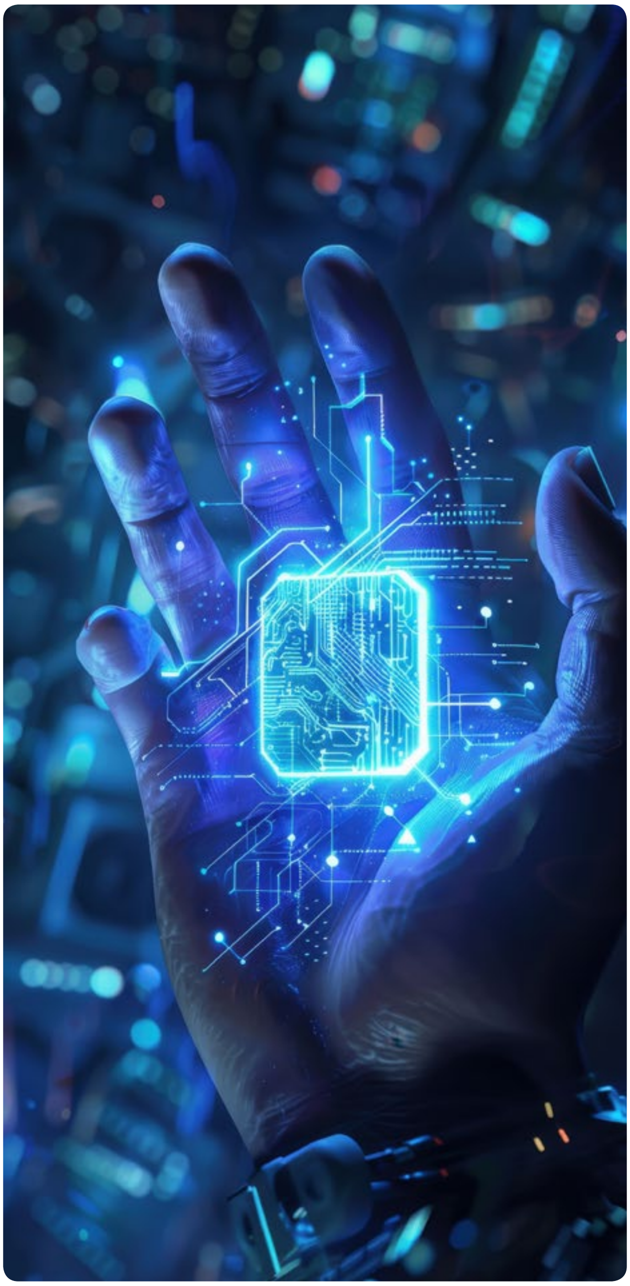
MOBILE BROADBAND

In 2024, Malaysia's mobile broadband segment experienced a slight decline in total subscriptions, reflecting shifting consumer preferences and evolving market dynamics. Mobile broadband subscriptions fell by 1.2% to 44.78 million (2023: 45.33 million), although the segment recorded a CAGR of 1.8% from 2022 to 2024. While mobile broadband remains widely used, many users have begun consolidating their subscriptions, reducing the number of active mobile broadband lines per person. This trend is partly driven by the increasing availability and affordability of fixed broadband, particularly in urban and suburban areas, where users prefer more stable and high-speed connections.

Recognising the importance of affordable digital access, the Government, in collaboration with service providers, remains committed to making connectivity more accessible and inclusive across all levels of society. The ongoing RAHMAH packages are tailored to meet the needs of various user groups, including P-Hailing riders, students, media practitioners, and civil servants. These targeted offerings aim to enhance digital inclusion by providing affordable mobile and broadband services for specific segments of the population. Additionally, special packages are available for tourists, as well as for Malaysians eligible under the Bantuan Prihatin Rakyat (BPR) scheme.

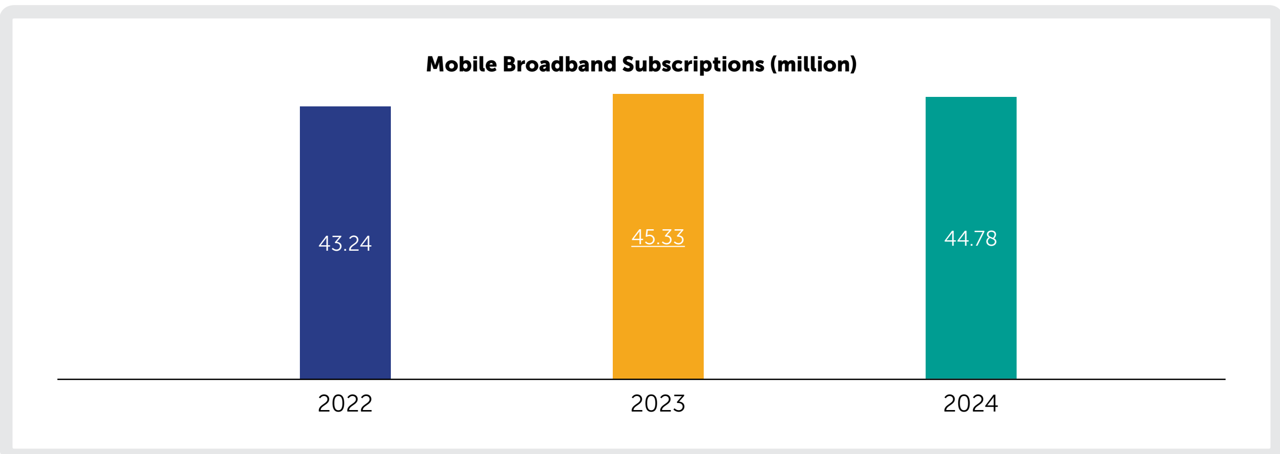
The increasing use of Wi-Fi at home, in offices, and in public spaces has also contributed to reduced demand for multiple mobile broadband subscriptions. With the market approaching saturation and most users already connected, service providers have responded by offering more flexible data packages, bundling services, and improving coverage and speed to retain existing users and attract new ones.

Despite the decline in subscription numbers, the mobile broadband segment continues to play a vital role in nationwide connectivity, particularly in rural and underserved areas where fixed broadband infrastructure is still being expanded. Figure 3.5 shows 4G LTE and 5G coverage in populated areas from 2022 to 2024. Although 4G LTE remains the dominant technology in terms of coverage, 5G has been rapidly gaining traction in recent years.



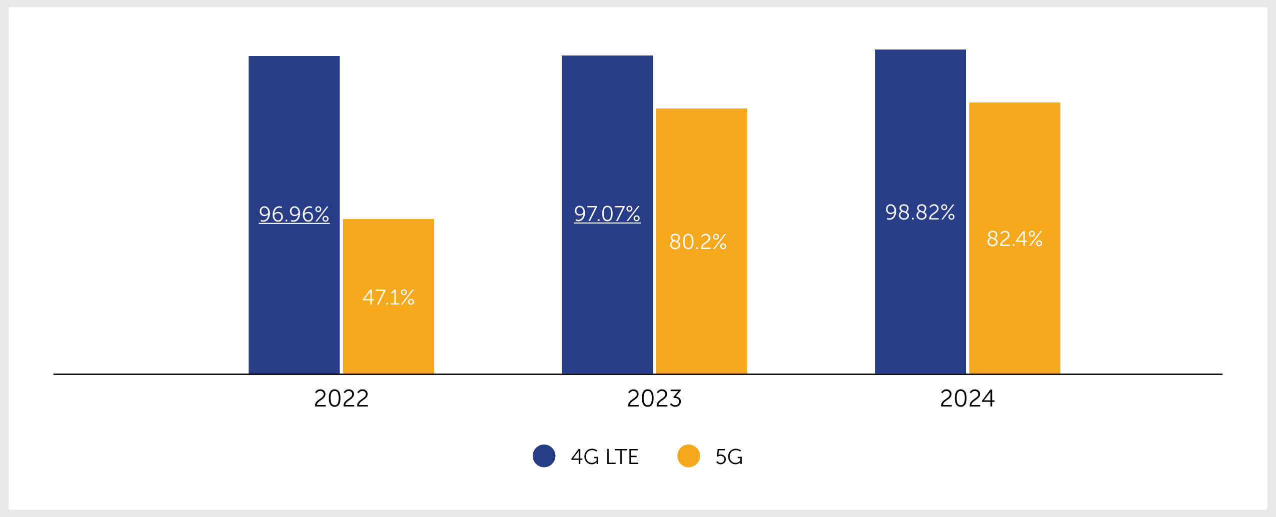
3

MOBILE BROADBAND SUBSCRIPTIONS AND PENETRATION RATE 2022–2024



Source: *MCMC*
Figure 3.4: *Mobile Broadband Subscriptions and Penetration Rate 2022–2024*

4G LTE AND 5G COVERAGE IN POPULATED AREAS 2022–2024



Source: *MCMC*
Figure 3.5: *4G LTE and 5G LTE Coverage in Populated Areas 2022–2024*

MALAYSIAN SATELLITE SERVICES MARKET

The Malaysian satellite services market is poised for growth, driven by rising demand for high-speed communication services across multiple industries. Key factors supporting this expansion include the need for reliable internet connectivity in remote areas, the growing use of satellite technology in sectors such as broadcasting and aerospace, and increased remote communication requirements. Government initiatives and a growing appetite for satellite-based solutions continue to position Malaysia as a promising market for growth and strategic partnerships.

According to Verified Market Research, the Malaysian Satellite Services Market was valued at RM 1.99 billion (USD 433.47 million) in 2023 and is projected to reach RM 2.85 billion (USD 621.04 million) by 2031, growing at a CAGR of 4.60% from 2024 to 2031. By end-use, the market is segmented into broadcasting, telecommunications, government, aerospace, and defence[6].

In 2024, efforts are underway to test new technologies aimed at enhancing Malaysia's telecommunications coverage. One such innovation is Starlink's Direct-to-Cell service[7], which enables smartphones to receive telecommunication signals transmitted by Low Earth Orbit (LEO) satellites without requiring additional equipment. These satellites function as transmission towers in space, broadening network reach to underserved areas.

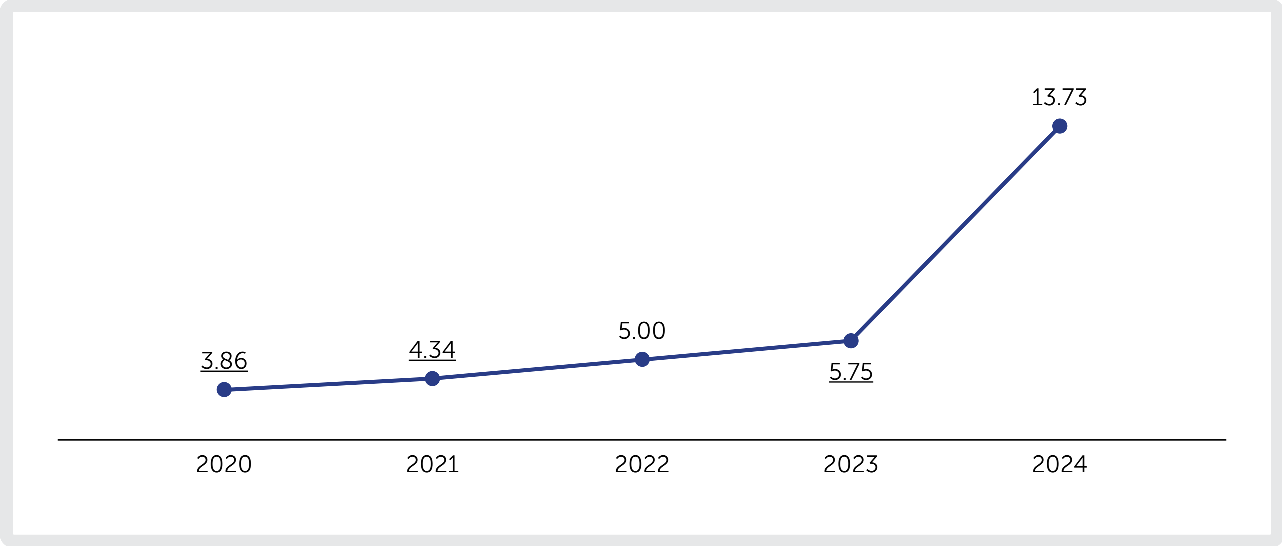
Additionally, the Malaysian Government is actively working to improve internet access nationwide. By the end of 2024, 5G coverage of populated areas had reached 82.4% under the JENDELA programme, while satellite technology was deployed to enhance connectivity in remote locations. These efforts support the national goal of achieving universal internet access by 2025, as outlined in MyDIGITAL.

A collaboration between Chinese satellite company Geespace and Altel has led to the establishment of Malaysia's first satellite research centre. This centre aims to support the Government efforts in expanding mobile network coverage in remote areas through the use of LEO satellites capable of transmitting signals directly to mobile phones. The project is expected to attract over RM 400 million in foreign investment and generate opportunities for research and development in satellite technology.

Figure 3.6 shows fixed broadband satellite subscriptions in Malaysia over a five-year period. Subscription numbers have demonstrated a consistent upward trend, increasing from 3,861 in 2020 to 13,726 in 2024, more than tripling over the period.

[6] *Verified Market Research Report, Malaysia Satellite Services Market Size by Service Consumer Service and End Use, And Forecast, May 2024.*
[7] *Malay Mail, Malaysia considering Direct-to-Cell Starlink services as early as 2025.*

FIXED BROADBAND SATELLITE SUBSCRIPTIONS 2020–2024 ('000)



Source: *MCMC*
Figure 3.6: *Fixed Broadband Satellite Subscriptions 2020–2024 ('000)*

THE DEVELOPMENT AND ACHIEVEMENT OF *PELAN JALINAN DIGITAL NEGARA* (JENDELA)

Commenced in September 2020, JENDELA was formulated to enhance nationwide connectivity and improve the quality of communication experiences through sustainable and comprehensive digital infrastructure development. It is a five-year plan (2020–2025) focused on strengthening digital connectivity by leveraging multiple technologies, including fibre optics, 4G, 5G, and satellite services, to deliver reliable and high-quality fixed and mobile broadband access.

JENDELA aspires to benefit all Malaysians by achieving key targets under the 12th Malaysia Plan (RMK-12) by 2025. These include passing nine million premises with fibre connectivity, achieving 100% internet coverage in populated areas, and reaching an average mobile broadband speed of 100 Mbps. Ultimately, the goal is to ensure that all Malaysians are able to leverage the digital connectivity enabled by JENDELA to improve their socioeconomic well-being.

IMPLEMENTATION AND ACHIEVEMENT OF JENDELA

The implementation of JENDELA focuses on ensuring quality broadband coverage across the country. This includes the construction of new 4G towers and the upgrading of existing base stations to enhance coverage, improve service quality, and increase mobile broadband speeds. In addition, initiatives to provide fixed broadband with fibre access to new premises, as well as the continued expansion of 5G coverage, are also being carried out under JENDELA. The key projects implemented under the programme are illustrated in Figure 3.7.

FIXED BROADBAND SATELLITE SUBSCRIPTIONS 2020–2024

Source: *MCMC*
Figure 3.7: *Key Projects under JENDELA*

JENDELA has continued to improve broadband coverage and quality, and its implementation remains on track to achieve the targets set under the RMK-12. Since its commencement in September 2020, and up to 31 December 2024, JENDELA has recorded the following achievements:

A

A total of 9.03 million premises nationwide now have fibre connectivity — an increase of 4.07 million premises from the original 4.96 million. This has surpassed the target of 9 million premises passed under JENDELA;

B

45,913 existing base stations have been upgraded to improve service speed and quality; and

C

3,519 new 4G towers have been constructed to enhance 4G coverage in populated areas.

These achievements contribute to the overall progress of JENDELA, as illustrated in Figure 3.8.

Premisses Passed with Fibre Connectivity	Average Mobile Broadband Speed	Internet Coverage Populated Areas
Target: **9 Mil Premised Passed**	Target: **100 Mbps (Mean)**	Target: **100%**
Achievement as of **31 December 2024**	Achievement as of **31 December 2024**	Achievement as of **Q4 2024**
9.03 Mil Premised Passed	**105.36 Mbps (Median)**	**98.66% [1]**
Baseline August 2020 **(4.96 Mil Premises Passed)**	Baseline August 2020 **(25 Mbps)**	Baseline August 2020 **(91.8%)**

Note:
[1] *Coverage as of Q4 and not including 5G coverage. Internet coverage is measured on quarterly basis.*

Source: *MCMC*
Figure 3.8: *Overall JENDELA Achievements as of 31 December 2024*

The industry has demonstrated commendable efforts in accelerating network rollout and enhancing coverage quality to ensure the public fully benefits from JENDELA. The industry's performance in implementing JENDELA is summarised in Figure 3.9.

Source: *MCMC*
Figure 3.9: *Overall Achievements of the JENDELA Project by Industry Players 2024*

Although the industry demonstrated satisfactory progress in both premises passed and base station upgrades in 2024, there were still shortfalls in several areas, as illustrated in the figure above. Most of the delays, particularly in rural areas, were attributed to challenges faced by service providers, including delays in obtaining permit approvals from local authorities, a shortage of tower erectors, site relocations due to landlord issues, and fibre readiness constraints. In addition, the completion of base station upgrades was hampered by delays in tower fiberisation rollout and the installation of tower repeaters.

JENDELA IMPLEMENTATION WAY FORWARD UNTIL 2025 (JENDELA 2.0)

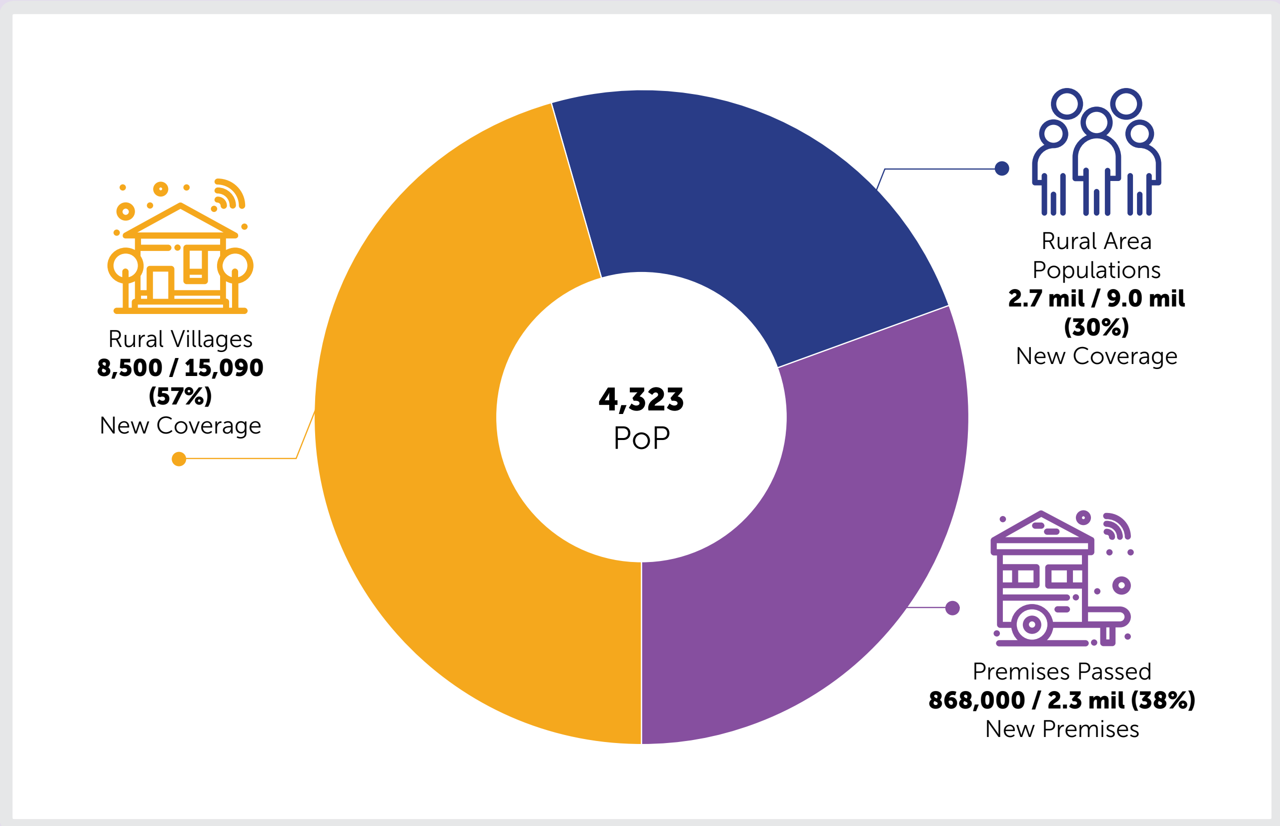
By the end of 2024, JENDELA had implemented various initiatives to achieve 97% internet coverage in populated areas. JENDELA 2.0 will focus on extending coverage to the remaining 3% of populated areas, which are primarily located in rural and remote regions. The initiative will adopt a fit-for-purpose approach by identifying suitable technologies, including satellite connectivity, to address challenges related to high deployment costs, time-to-deploy, and coverage pervasiveness in these areas.

JENDELA 2.0 will also prioritise improving coverage and quality across seven key areas, namely: major highways and protocol routes (including roads connecting populated areas), public higher education institutions (IPTA), military camps, hospitals, event venues, tourism sites, and national stadiums.

In addition, following the signing of the Network and Infrastructure Sharing Trial Agreement on 9 May 2024, the industry has embarked on five Proof of Concept (PoC) projects, all of which were successfully operational by the end of December 2024. One such project, located in Tanjung Asam, Gertak Sanggul, Pulau Pinang, forms part of the "Di Mana Ada Jalan, Di Situ Ada Internet" initiative, which aims to achieve 100% coverage at the state level.

SCHOOLS AS FIBRE OPTIC HUBS (POINTS OF PRESENCE) TO CONNECT THE COMMUNITY

To ensure improved internet connectivity in schools, the Point of Presence (PoP) Project, initiated by the Government through the Ministry of Communications, commenced in 2022. The project involves the deployment of fibre optic network hubs at 4,323 schools nationwide, targeted for completion by the end of 2025, as illustrated in Figure 3.10.



Source: *MCMC*
Figure 3.10: *Point of Presence Project until 2025*

Beyond enhancing school connectivity, the project is also expected to benefit surrounding communities and premises by enabling access to gigabit broadband. As of 31 December 2024, a total of 1,845 PoPs have been completed.

ADVANCING 5G IMPLEMENTATION THROUGH JENDELA

The implementation of 5G is one of the key projects under JENDELA. Launched in Q4 2021, the rollout initially targeted 7,509 5G sites by the end of 2024. As of 31 December 2024, 5G coverage in populated areas reached 82.4%, with 7,485 sites successfully completed, representing 99.68% of the initial target. In terms of adoption, 18.2 million 5G service subscriptions were recorded and 5G mobile broadband penetration rate stood at 53.35%.

In executing the Government's policy shift from a single wholesale network to a dual network model announced in May 2023, MCMC has coordinated and developed regulatory policies to guide the transition. This dual network model introduces more competition in the telecommunications landscape, driving innovation and enhancing service quality. With the second 5G network, Malaysia can diversify service options, ensuring that consumers have access to more competitive prices and improved coverage. This step is crucial for bridging the digital divide and boosting economic growth through better digital infrastructure and wider reach, especially in underserved rural areas.

On 1 November 2024, MCMC announced the selection of U Mobile Sdn Bhd as the second 5G network provider. This decision was based on an assessment under the Applicant Information Package (No.1 of 2024), in accordance with Regulation 8 of the Communications and Multimedia (Spectrum) Regulations 2000.

This strategic shift aims to accelerate 5G coverage, promote technological advancement, and enhance nationwide connectivity, particularly in urban and rural areas. It also supports the country's broader digital transformation goals while delivering significant economic and social benefits.

A COLLABORATIVE EFFORT TO DELIVER CONNECTIVITY FOR ALL

Since the commencement of the JENDELA, MCMC, in cooperation with various government agencies such as the Ministry of Communications and the Ministry of Housing and Local Government, has played a crucial role in presenting policy recommendations at national-level platforms to support and expedite the deployment of digital infrastructure.

Among the collaborative initiatives is the establishment of a special committee chaired by the Secretary-General of the Ministry of Communications to standardise processes, charges, and fees related to the development of mobile and fixed-line infrastructure across federal, state, and local government agencies. The committee presented the Memorandum on Standardisation of Processes, Charges, and Fees for the Development of Communications Infrastructure at the State Level during the 143rd Meeting of Prime Ministers and Chief Ministers (MBKM) on 16 July 2024. Following this, the meeting agreed that state governments would deliberate further at their respective state council meetings and provide updates to the Ministry of Communications. The Ministry is currently collecting these updates in preparation for the next special committee meeting chaired by the Secretary-General.

Another collaborative initiative is the establishment of policies regarding the ownership and administration of reserved land for communication towers. Pulau Pinang and Melaka have designated their respective State Land and Mines Offices as administrators for communication infrastructure reserve land. Meanwhile, Pahang, Terengganu, Kedah, and Johor are preparing policy papers to appoint land administrators, while Perlis, Selangor, Negeri Sembilan, Kelantan, and Wilayah Persekutuan are refining mechanisms to determine suitable land administrators for these areas.

The successful implementation of communication infrastructure depends significantly on the commitment and coordinated efforts of all parties, including the Federal and state governments, local authorities, industry players, the private sector, and local communities.

INTERNET EXCHANGE POINT

A robust digital connectivity ecosystem is essential to ensuring high-speed internet access with superior quality. In response, MCMC introduced the Jendela+ initiative, following the National Interconnection Ecosystem Lab (NIEL) held in May 2021. One of the key focus areas under Jendela+ is the development and expansion of Internet Exchange Points in Malaysia.

An Internet Exchange Point (IXP) is a physical hub where internet infrastructure providers, such as Internet Service Providers (ISPs) and Content Delivery Networks (CDNs), interconnect to exchange traffic. These interconnection points exist at the edges of various networks and enable participants to share transit beyond their own infrastructure. By connecting through an IXP, network providers can reduce latency, improve round-trip data times, and lower overall transit costs.

There are three major IXP providers in Malaysia: MyIX, TMIX, and DE-CIX. As of December 2024, these providers collectively onboarded 29 new peering members and trained 70 new participants.

Over the years, both bandwidth utilisation and the number of peering entities have shown consistent growth. In 2024, domestic internet traffic exchanged via IXP recorded bandwidth utilisation of 4,292 Gbps, reflecting a 90% increase compared to the previous year.

MYIX MAXIMUM BANDWIDTH UTILISATION AND PEERING TREND 2016–2024

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024
Maximum Bandwidth Utilisation (Gbps)	201	245	391	500	779	1,424	1,938	2,254	4,292
Number of Peers	88	85	94	108	116	125	130	135	226

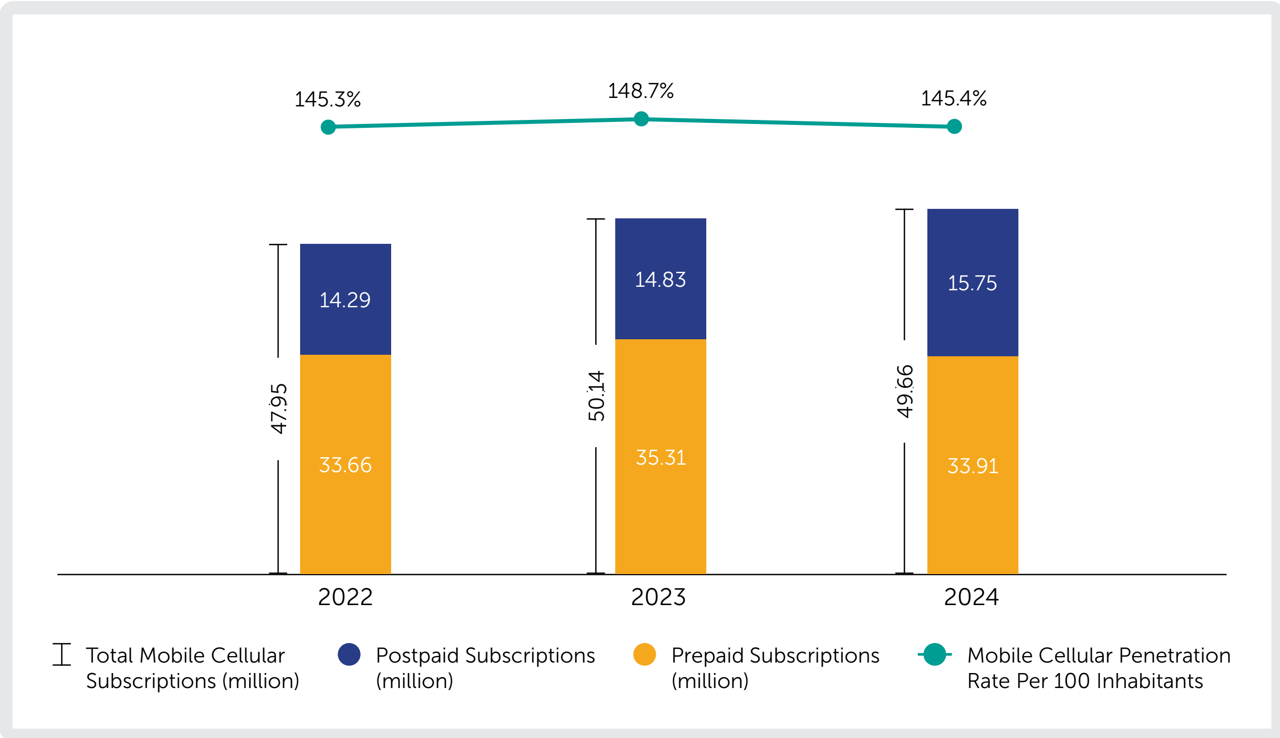
Source: *MyIX, MCMC*
Figure 3.11: *MyIX Maximum Bandwidth Utilisation and Peering Trend 2016–2024*

Additionally, MCMC conducted site verifications at eight selected IXP locations across Malaysia, including Penang, Selangor, Kuala Lumpur, Johor, and Melaka.

MOBILE CELLULAR SERVICES

POSTPAID AND PREPAID

MOBILE CELLULAR SUBSCRIPTIONS AND PENETRATION RATE 2022–2024



Source: *MCMC*
Figure 3.12: *Mobile Cellular Subscriptions and Penetration Rate 2022–2024*

Mobile cellular service is a widely used telecommunications technology that enables wireless communication between mobile devices via radio waves, allowing individuals to make phone calls, send text messages, and access the internet while on the move.

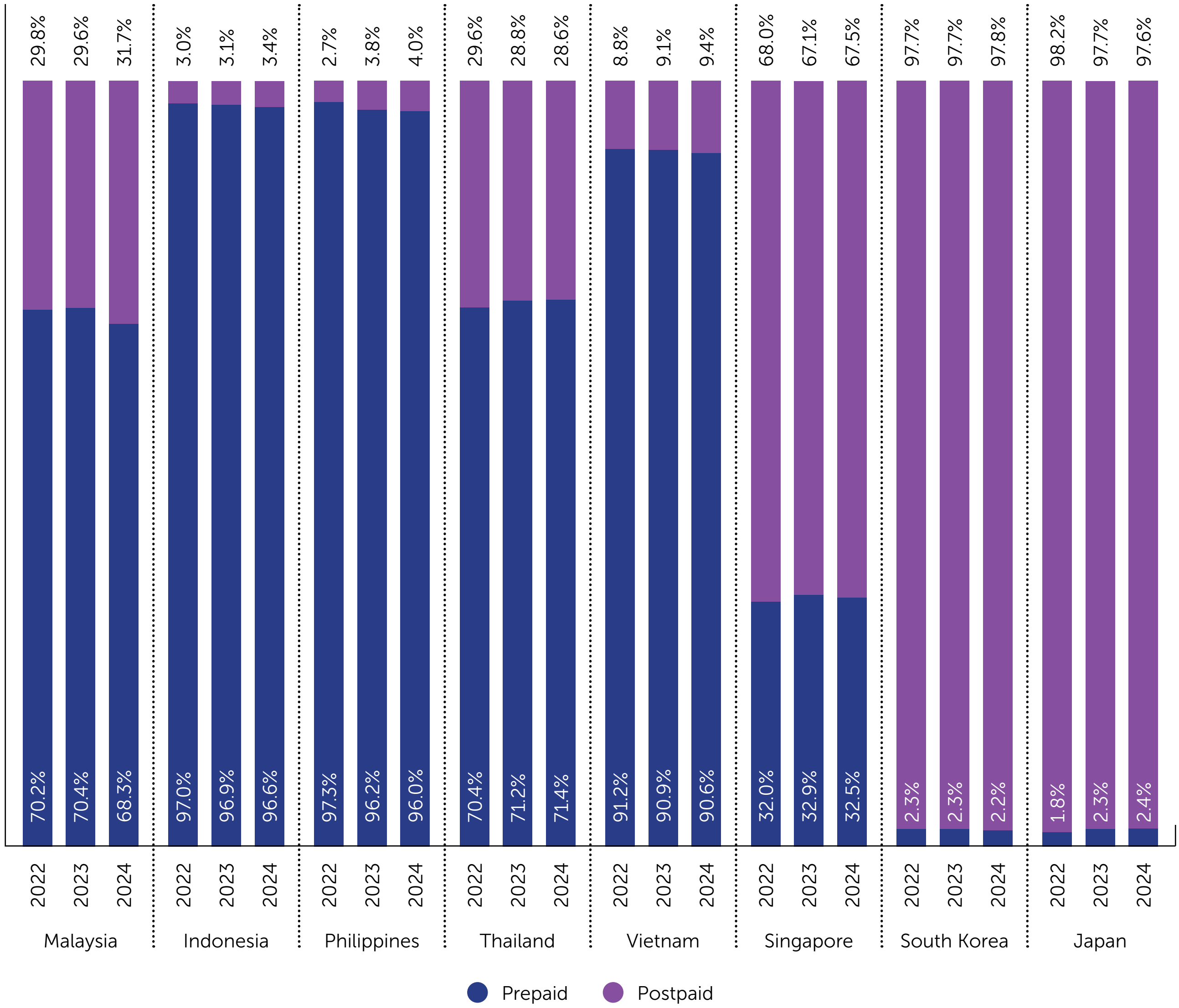
As technology has advanced, new generations of mobile networks such as 4G and now 5G have emerged, offering faster data speeds, lower latency, and improved overall performance. The widespread use of mobile cellular services has significantly shaped the digital landscape, providing users with instant access to a wealth of information at their fingertips.

The total number of mobile cellular subscriptions declined by 1.0% to 49.66 million in 2024 (2023: 50.14 million). This decline was driven by SIM consolidation among users, increased adoption of fixed broadband services, and evolving mobile service plans that have impacted user retention and acquisition. Between 2022 and 2024, mobile cellular subscriptions grew at a CAGR of 1.8%.

Malaysia's mobile cellular landscape is undergoing a shift, marked by a notable increase in postpaid subscriptions, while prepaid subscriptions experienced a slight decline. Despite this trend, Malaysia remains a prepaid-dominant market, with prepaid subscriptions accounting for slightly over 68% of the total market share in 2024. However, the gap between prepaid and postpaid subscriptions has narrowed, suggesting that local telecommunications providers have successfully implemented strategies to attract more postpaid users. Through competitive pricing, bundled services, and strengthened customer retention initiatives, telcos aim to reduce churn, acquire higher-value customers, and improve overall average revenue per user (ARPU).

Figure 3.13 illustrates the prepaid and postpaid subscription market share across selected Asian countries. Emerging economies such as Malaysia, Indonesia, the Philippines, Thailand, and Vietnam continue to be skewed towards prepaid, primarily due to greater price sensitivity among subscribers in these markets. In contrast, developed economies such as Singapore, South Korea, and Japan are more inclined towards postpaid, reflecting higher purchasing power and long-term service preferences.

PREPAID AND POSTPAID SUBSCRIPTIONS MARKET SHARE BY COUNTRY 2022–2024



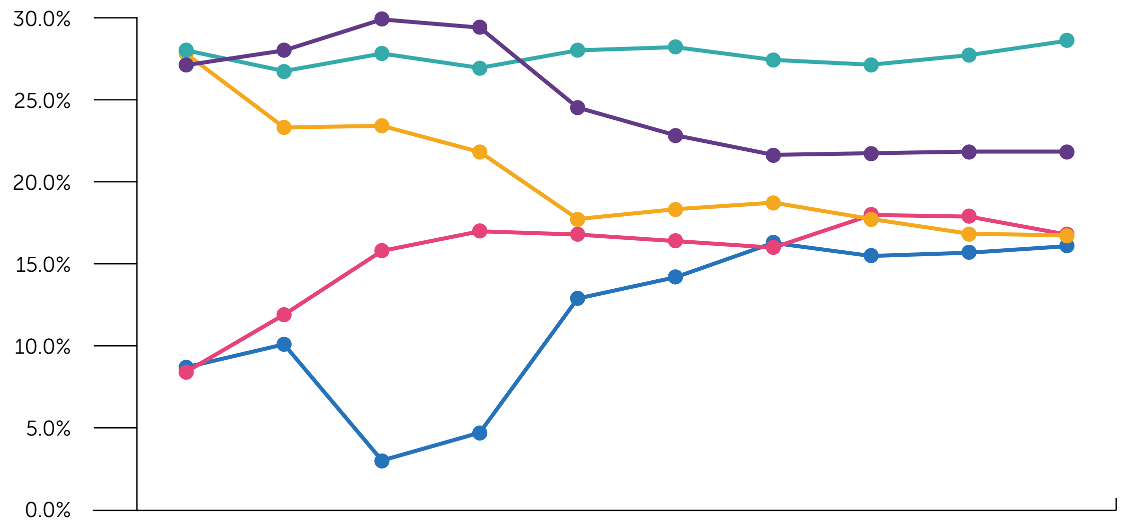
Source: *MCMC, Omdia*
Figure 3.13: *Prepaid and Postpaid Subscriptions Market Share by Country 2022–2024*

By service provider, Maxis held the highest subscription market share in 2024 at 28.6%, followed by Digi (21.8%) and U Mobile (16.8%). The remaining market share was attributed to Celcom (16.7%) and other service providers, including MVNOs, which collectively accounted for 16.1%.

The telecommunications market has remained relatively stable over the past decade. Maxis and Digi maintained consistent market positions, while Celcom experienced a decline in market share due to an ongoing three-year integration phase. Following the merger between Celcom and Digi, the newly formed entity encountered notable challenges in the prepaid segment, largely as a result of SIM consolidation efforts between the two legacy brands.

Despite these challenges, CelcomDigi remains optimistic about the benefits of net synergies, driven by improvements in capital expenditure (Capex) efficiency and annual cost savings following the completion of its integration initiatives. Meanwhile, U Mobile and other service providers, including MVNOs, demonstrated steady growth throughout the decade, reflecting intensified market competition and the growing availability of alternatives beyond the dominant industry players.

MOBILE CELLULAR SUBSCRIPTIONS MARKET SHARE BY SERVICE PROVIDERS 2015–2024



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Digi	27.1%	28.0%	29.9%	29.4%	24.5%	22.8%	21.6%	21.7%	21.8%	21.8%
Maxis	28.0%	26.7%	27.8%	26.9%	28.0%	28.2%	27.4%	27.1%	27.7%	28.6%
Celcom	27.8%	23.3%	23.4%	21.8%	17.7%	18.3%	18.7%	17.7%	16.8%	16.7%
U-Mobile	8.4%	11.9%	15.8%	17.0%	16.8%	16.4%	16.0%	18.0%	17.9%	16.8%
Others/MVNOs	8.7%	10.1%	3.0%	4.7%	12.9%	14.2%	16.3%	15.5%	15.7%	16.1%

Source: *MCMC*
Figure 3.14: *Mobile Cellular Subscriptions Market Share by Service Providers 2015–2024*

MOBILE VIRTUAL NETWORK OPERATOR

A Mobile Virtual Network Operator (MVNO) is a wireless communications service provider that delivers telecommunications services by leveraging the infrastructure and network of existing Mobile Network Operators (MNOs). By utilising excess network capacity from MNOs, MVNOs have intensified competition in the market, resulting in a wider range of product offerings at various price points for consumers.

MVNOs are experiencing rapid growth across ASEAN countries, including Thailand, Singapore, Malaysia, and Vietnam. This expansion is largely driven by the widespread adoption of smartphones and internet services across the region. The increasing presence of MVNOs is contributing to overall market growth, attracting new investments, stimulating economic activity, and potentially generating employment opportunities. The ASEAN MVNO market size is estimated at USD 2.82 billion in 2024 and is projected to reach USD 3.83 billion by 2029, growing at a CAGR of 6.33% during the forecast period (2024-2029) .

In Malaysia, the MVNO market has shown notable progress in recent years, primary driven by efforts to provide more customer-centric and cost-effective services. These include the introduction of new postpaid offerings and device bundling plans tailored to evolving consumer preferences. MVNO subscriptions reached 8 million in 2024, representing a 1.5% increase compared with 7.88 million subscriptions in 2023. MVNOs accounted for 16.1% of total mobile subscriptions, out of 49.66 million in 2024.

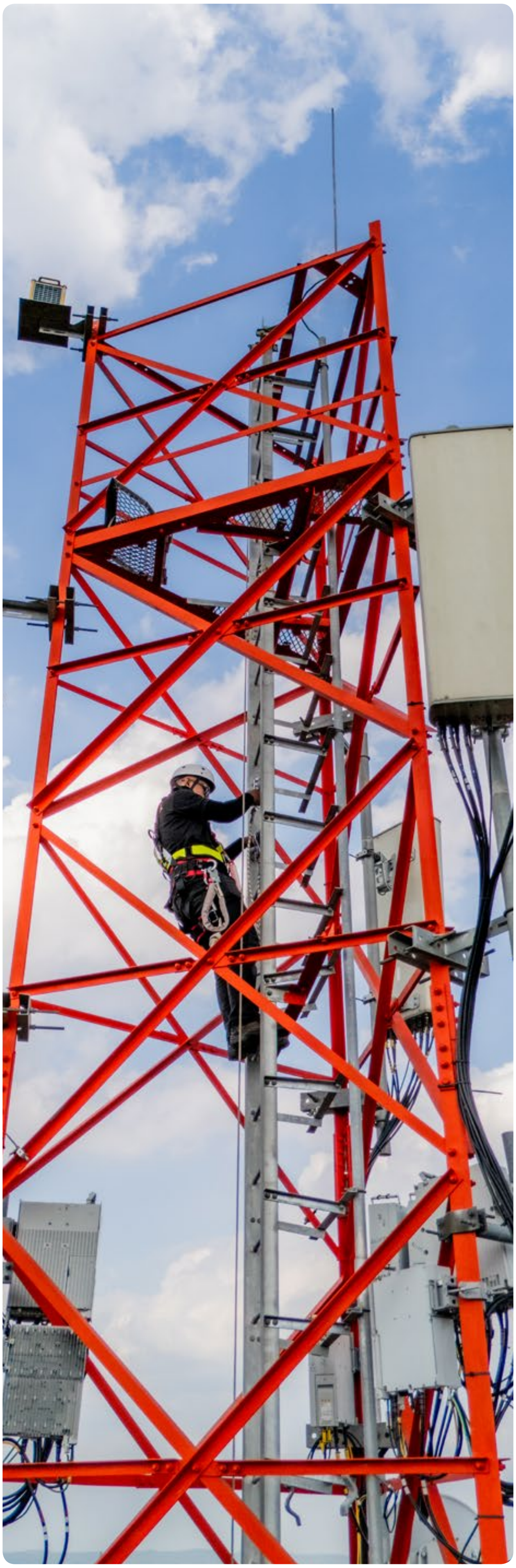
As of 2024, 20 licensees were actively providing mobile virtual network services, a significant increase from nine licensees in 2023. The list of active MVNOs in 2024 is as follows:

1.	Anchor Communications Sdn Bhd
2.	B Communications Sdn Bhd
3.	BT Systems (Malaysia) Sdn Bhd
4.	Cubic Telecom Malaysia Sdn Bhd
5.	Jejak Semangat Sdn Bhd
6.	Jos (Malaysia) Sdn Bhd
7.	Mbits Digital Sdn Bhd
8.	Pacific Comnet (M) Sdn Bhd
9.	Pavo Communications Sdn Bhd
10.	Red One Network Sdn Bhd
11.	Redtone Engineering & Network Services Sdn Bhd
12.	Satellite Noc Sdn Bhd
13.	Stallion Network Sdn Bhd
14.	Tone Excel International Sdn Bhd
15.	Tone Plus Sdn Bhd
16.	Tone Wow Sdn Bhd
17.	Tune Talk Sdn Bhd
18.	Uni Comms International Sdn Bhd
19.	Valyou Sdn Bhd
20.	XOX Com Sdn Bhd

Source: *MCMC*
Figure 3.15: *List of MVNOs 2024*

On top of accelerating the rollout of high-speed 5G services, MVNOs are increasingly focusing on strategies to support sustainable growth. These include expanding their customer base through affordable and flexible prepaid plans, strengthening brand visibility through strategic partnerships and targeted promotional efforts, and enhancing customer loyalty by improving service quality.

While the Malaysian MVNO market continues to face structural and regulatory challenges, it has demonstrated resilience through ongoing innovation and adaptive strategies. These efforts are expected to support continued growth and strengthen competitiveness in the evolving telecommunications landscape.



5G DEVELOPMENT IN MALAYSIA

Malaysia's 5G initiative represents a transformative step towards positioning the country as a regional leader in the digital economy. By adopting a Single Wholesale Network (SWN) model, the strategy centralised 5G deployment, streamlined infrastructure development, and optimised resource efficiency under a single provider, Digital Nasional Berhad (DNB). Since its appointment, DNB has spearheaded the nationwide 5G rollout, expediting service deployment and ensuring widespread access to next-generation connectivity.

On 3 May 2023, the Malaysian Government announced a strategic shift in its 5G deployment framework, transitioning from the SWN model to a Dual Network (DN) model. Subsequently, on 1 November 2024, U Mobile was officially appointed by MCMC as the second 5G network provider. The appointment was made pursuant to the Applicant Information Package No. 1 of 2024, under Regulation 8 of the Communications and Multimedia (Spectrum) Regulations 2000. Subject to MCMC's approval, U Mobile may collaborate with other MNOs in the implementation of the second 5G network.

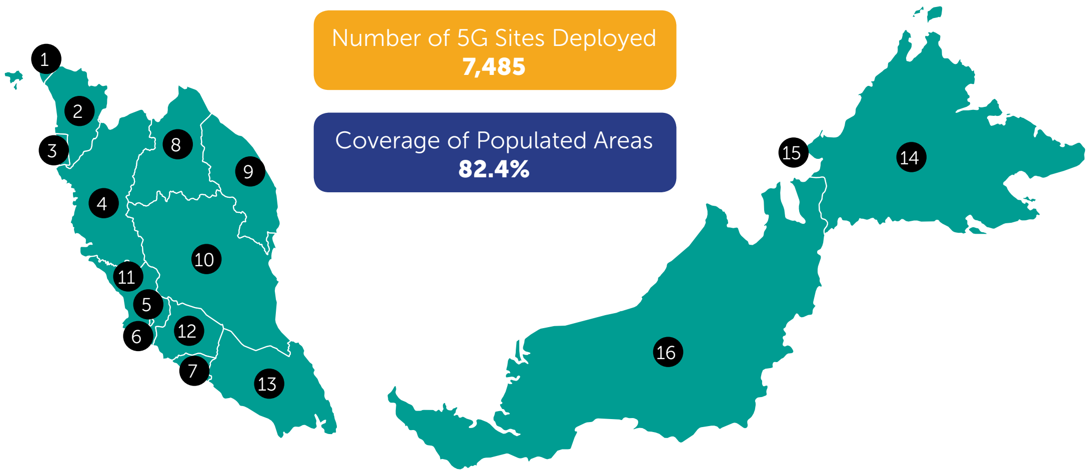
The introduction of a second 5G network is expected to enhance competition, diversify service offerings, and improve network coverage. This development is crucial for bridging the digital divide and promoting inclusive economic growth through better digital infrastructure, particularly in underserved rural areas.

NETWORK ROLLOUT

As of 31 December 2024, the 5G network achieved 82.4% coverage of populated areas (COPA), with a total of 7,485 sites deployed nationwide. Notably, the total number of fiberised sites stands at 5,443, representing 72.7% of the 7,485 sites deployed.

DNB reported that network performance remained stable throughout 2024, with nationwide availability exceeding 99.8%. These milestones underscore Malaysia's commitment to delivering high-quality, reliable connectivity and advancing its digital infrastructure.

The table below provides a detailed breakdown of cumulative 5G site deployments and COPA percentages by state as of 31 December 2024.



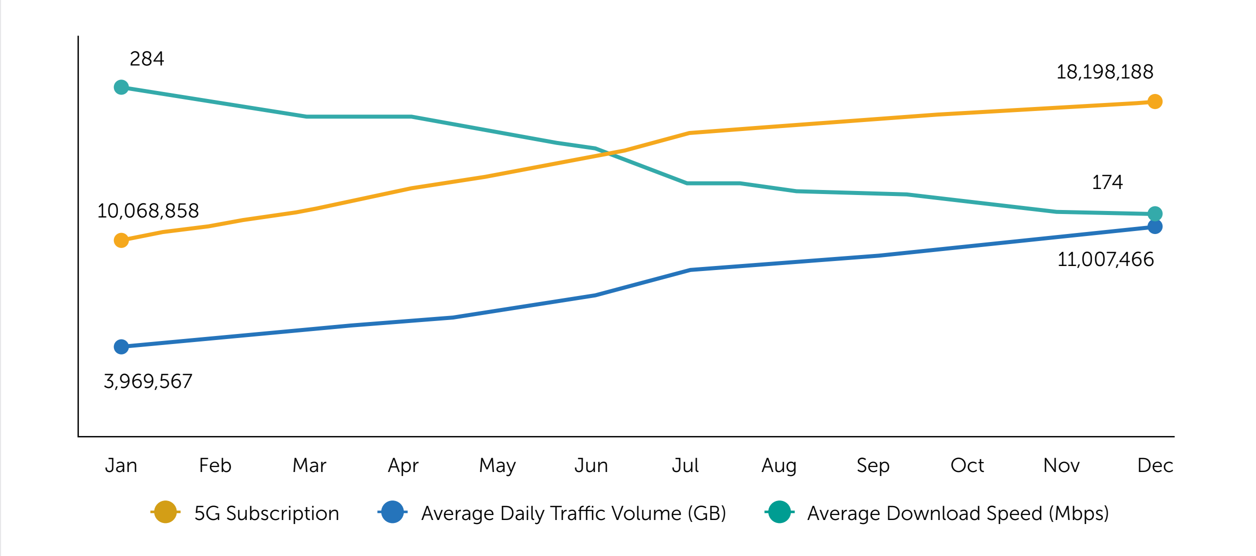
State	Number of 5G Sites Deployed	Coverage of Populated Areas
1. Perlis	44	91.4%
2. Kedah	389	80.2%
3. Pulau Pinang	450	92.0%
4. Perak	503	81.0%
5. W.P. Kuala Lumpur	761	97.8%
6. W.P. Putrajaya	108	97.3%
7. Melaka	215	89.7%
8. Kelantan	232	67.0%
9. Terengganu	228	73.2%
10. Pahang	360	66.4%
11. Selangor	1,822	96.9%
12. Negeri Sembilan	232	77.6%
13. Johor	928	84.2%
14. Sabah	597	69.0%
15. W.P. Labuan	42	96.3%
16. Sarawak	574	63.8%

● Number of 5G Sites Deployed ● Coverage of Populated Areas

Source: *MCMC, DNB*
Figure 3.16: *The Breakdown of 5G Coverage and Number of Sites Deployed by State*

NETWORK UTILISATION AND PERFORMANCE

COMPARISON BETWEEN UTILISATION AND PERFORMANCE



Source: *MCMC*
Figure 3.17: *Comparison between Utilisation and Performance*

The year 2024 saw a significant surge in 5G subscriptions and network traffic, driven by steady adoption and rising consumer demand. Daily traffic volume rose sharply from 3,969 terabytes in January to 11,007 terabytes by December 2024. Despite this rapid growth, the network maintained robust and consistent performance, ensuring seamless connectivity and service reliability.

Although DNB's average download speeds recorded a decline from 284 Mbps in January to 174 Mbps in December 2024, performance consistently exceeded the 100 Mbps benchmark. This sustained high-speed connectivity underscores the network's strong service quality, reliability, and ability to deliver an optimal user experience amid escalating demand.

5G ADOPTION

The Government remains committed to accelerating 5G adoption across consumer, industrial, and enterprise sectors by leveraging its high bandwidth, low latency, and scalability to enable widespread digital transformation.

To boost consumer subscriptions and increase 5G device ownership, several strategic initiatives have been introduced, focusing on affordability, accessibility, and awareness. These include:

- Targeted subsidies for 5G-enabled devices
- Incentives for mobile service providers to offer competitive 5G plans
- Nationwide public awareness campaigns to educate consumers on the benefits of 5G

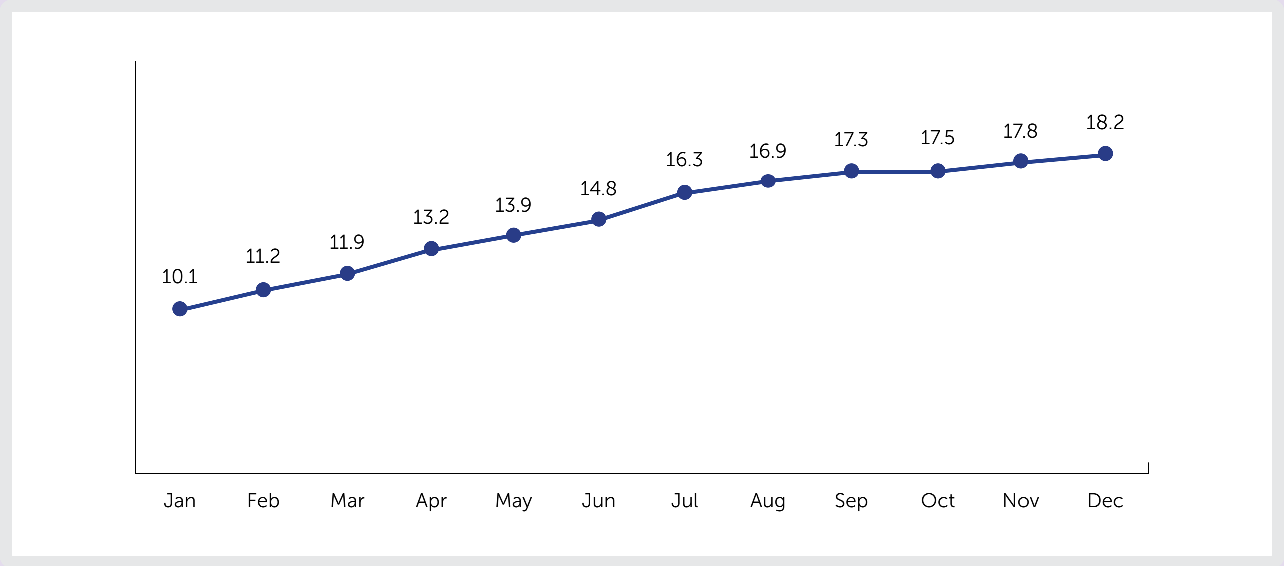
Efforts to expand 5G network coverage in rural and underserved areas are actively progressing to ensure equitable access to high-speed connectivity. The appointment of U Mobile as the second 5G network provider is expected to further support service expansion, strengthening nationwide coverage. At the same time, the Government is streamlining regulatory processes and incentivising investment in 5G infrastructure to accelerate deployment and reinforce Malaysia's digital landscape.

To further stimulate adoption, collaborations with device manufacturers and retailers have been established to introduce financing schemes and trade-in programmes, making 5G devices more accessible. These measures are aligned with Malaysia's broader digital transformation agenda and reinforce its position as a future-ready digital economy.

CONSUMER SUBSCRIPTION

As of 31 December 2024, a total of 18.2 million 5G subscriptions were recorded, representing a penetration rate of 53.35 subscriptions per 100 inhabitants. This marks a significant increase from 10 million subscriptions in January 2024. The chart below illustrates the month-by-month growth of 5G service subscriptions throughout the year.

5G SUBSCRIPTIONS IN 2024 (MILLION)



Source: *MCMC*
Figure 3.18: *5G Subscription 2024*

MNOs have supported this growth by offering affordable 5G packages tailored to diverse user needs. Starting from as low as RM 28, these plans provide varying data allowances to accommodate different usage patterns and preferences.

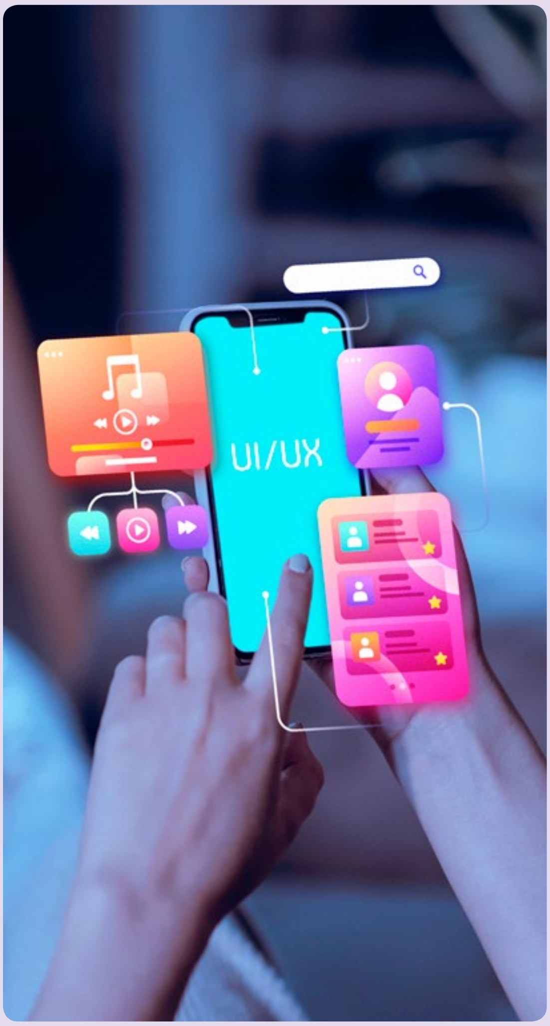
ENTERPRISE 5G

To facilitate 5G adoption among industrial and enterprise users, the Government and service providers continue to engage with various stakeholders to explore the application of 5G in enhancing operational efficiency and business performance.

Enterprise 5G adoption is steadily evolving in Malaysia, with many companies beginning to explore how 5G can be integrated into their daily operations. The appointment of U Mobile as Malaysia's second 5G network provider has expanded service options for enterprise customers, allowing them to choose solutions that best align with their specific business needs. This increased competition is expected to drive innovation, improve service offerings, and enhance cost efficiency, ultimately fostering a more dynamic and customer-focused 5G ecosystem.

The Government remains committed to supporting enterprises in their digital transformation journey, ensuring that businesses across various sectors can leverage 5G technology to enhance productivity, efficiency, and long-term growth.

Both DNB and U Mobile have identified key industry verticals to prioritise for 5G enterprise adoption, enabling businesses to incorporate 5G-powered solutions into their operations. An overview of ongoing and identified enterprise use cases is provided below.



ENTERPRISE 5G USE CASES IDENTIFIED BY DNB & U MOBILE

DNB (Current Live Projects)	U Mobile (Identified Use Cases)
Industrial & Manufacturing	Agriculture
Smart Education & Research	Broadcasting
Healthcare & Medical Technology	Manufacturing
Agriculture & Smart Farming	Smart City
Oil & Gas & Offshore Operations	Medical
Logistics & Smart Ports	Education
Electronics & Smart Factories	Shipping, Oil & Gas
Media & Entertainment (Broadcasting)	
Smart Transportation & Autonomous Vehicles	
Autonomous Electric Bus	

Source: *MCMC*
Figure 3.19: *Enterprise 5G Use Cases Identified by DNB and U Mobile*

3

The deployment of 5G enterprise solutions across these verticals is expected to enhance efficiency, automation, and digital capabilities, accelerating Malaysia's transition into an advanced digital economy. By leveraging 5G's ultra-low latency, high-speed connectivity, and massive IoT capabilities, businesses in these sectors can unlock new operational efficiencies, improve service delivery, and drive industry-wide transformation.

This strategic initiative positions Malaysia at the forefront of 5G enterprise adoption, with both DNB and U Mobile playing pivotal roles in enabling businesses to harness the full potential of next-generation connectivity.

5G ENTERPRISES CONNECT SERIES

The 5G Enterprises Connect Series is an initiative aimed at accelerating 5G adoption among Malaysian enterprises through a collaborative seminar series with MNOs. These seminars are designed to raise awareness of 5G adoption while providing the latest updates on its potential, benefits, and the challenges faced by enterprises in adopting this transformative technology.

In July 2024, MCMC and the Malaysian Investment Development Authority (MIDA) signed a Memorandum of Understanding, marking a significant milestone in promoting and accelerating the adoption of 5G technology across various sectors, particularly among small and medium enterprises (SMEs) and vertical industries. This partnership aligns with the New Industrial

Master Plan 2030 (NIMP 2030), which focuses on advancing economic complexity, accelerating digitalisation, and promoting net-zero carbon emissions. Through such initiatives, MIDA is helping to position Malaysia's industries as globally competitive, sustainable, and future-ready.

Subsequently, on 29 August 2024, an online session of the 5G Enterprises Connect Series, themed "Boosting Productivity: Leveraging 5G for Operational Efficiency", was held in collaboration with MIDA. The programme featured prominent speakers from PETRONAS, Ericsson, Huawei, and Aerodyne, who shared insights on industry trends, 5G use cases, and digital transformation strategies. The event attracted over 200 participants, including representatives from MCMC and SMEs under MIDA's business programme.

The session highlighted the transformative impact of 5G across industries, with a particular focus on the deployment of 5G private networks and their role in enhancing operational efficiency. Key insights were shared on how 5G enables enterprise competitiveness through ultra-reliable low-latency communication (URLLC) and IoT-based solutions.

On 25 October 2024, another edition of the 5G Enterprises Connect Series, themed "Unlock the Future of Business with 5G and AI", was held at the CelcomDigi Hub in Subang Jaya, Selangor. This session aimed to empower SMEs by showcasing how 5G and AI act as both disruptive forces and key enablers of digitalisation and transformation across business sectors.

The event brought together a targeted group of 46 SME participants, who had the opportunity to explore the CelcomDigi AI Experience Centre (AiX), a dynamic innovation hub supported by over 40 global and local partners, including Huawei, AWS, and Microsoft. The centre is designed to inspire and accelerate the development of digital solutions. It features advanced technologies such as 5G, Artificial Intelligence (AI), Extended Reality (XR), Robotics, Analytics, and the Metaverse, offering participants a firsthand experience of their transformative potential.

In conclusion, the 5G Enterprises Connect Series provides a collaborative platform to share best practices, explore innovative use cases, and foster partnerships among MNOs, SMEs, and other industry players. Beyond raising awareness, the series plays a pivotal role in strengthening collaboration between MNOs, technology providers, and enterprises to support the widespread adoption of 5G. It also empowers SMEs by equipping them with the tools, insights, and strategies necessary to leverage 5G for digital transformation and long-term innovation.

Looking ahead, 5G is anticipated to play a pivotal role in enabling smart cities, autonomous vehicles, and the Internet of Things (IoT). MCMC also envisions that the energy efficiency and green technology initiatives enabled by 5G will support Malaysia's sustainability agenda, ensuring that technological advancement contributes to a greener and more sustainable future.

Chapter 4:

CONTENT SERVICES

This chapter explains the development of TV and radio broadcasting in Malaysia. It mainly highlights the development of Digital TV in terms of channel count and viewership since the digital switchover. Advertising spending in 2024 is also presented in this chapter.


SOURCE
TTX/MIX
PRE-CH
CH
GUIDE
INFO
EXIT

KEY HIGHLIGHTS 2024

19.4 million
Malaysians in Peninsular Malaysia aged 15 and above watch content via free-to-air (FTA) TV

Pay TV subscribers in **2024: 5.96 million**

Pay TV penetration rate as at **31 Dec 2024: 65.4%**

MYTV digital terrestrial television reached **7.5 million viewers last year (+19.4% year on year)**

MYTV Mana-mana apps recorded a total of **579,297 downloads**

MYTV consist of:

Live TV channels (13 local, 10 international): **23**	Radio channels: **23**	Video-On-Demand (VOD) contents: **23**

Advertising Expenditure (ADEX): **RM6.11 billion in 2024**

TV BROADCASTING LANDSCAPE IN MALAYSIA

The journey of television broadcasting in Malaysia began in 1963 with the launch of TV1, the country's first free-to-air (FTA) broadcasting service. Despite its humble beginnings, the demand for content through television grew rapidly. To meet this rising demand, coverage was extended to areas outside the Klang Valley, bringing television closer to more Malaysians and fostering a shared national experience.

A pivotal moment in Malaysian broadcasting history came in 1978, when colour television was introduced, a revolutionary step that enhanced the viewing experience and marked a significant technological advancement. This milestone not only elevated the quality of broadcasts but also symbolised Malaysia's ambition to modernise its media landscape.

The delivery of content through television has experienced a transformational shift with the emergence of TV3, the country's first privately-owned television station. TV3's entry into the market in 1980s enriched Malaysia's broadcasting scene by introducing new programme genres and broader content offerings, catering to a more diverse audience. This evolution in television broadcasting laid the foundation for Malaysia's vibrant media industry today, reflecting a legacy of growth, innovation, and connection.

Moving forward in the 1990s, toward 1995 and 1996, Pay-TV services were introduced namely Mega TV and ASTRO offering a wide range of channels designed to cater to a diverse need of various consumers. These services aimed to represent and engage audiences from a variety of demographic backgrounds, enriching the television landscape in Malaysia.

Today, television and video content are more accessible than ever. In addition to traditional FTA TV and Pay TV services delivered via terrestrial, satellite, and IPTV platforms, audiences can enjoy their favourite programmes anytime and anywhere, extending beyond the television at home. This transformation is driven by the expansion of Internet coverage and the increasing adoption of mobile devices, enabling seamless access to television and video content.

1963

Radio Television Malaysia (RTM)

Began its broadcasting in **1946** with its first radio service. Television broadcasting started later, with **RTM TV1** officially launching on **31 December 1963**

1963

Color TV

Color TV was introduced in Malaysia in 1978. The first color broadcast was during the Merdeka Day parade on 31 August 1978. This marked a major milestone in the country's broadcasting history

1984

TV3

The first commercial television station, TV3 launched in Malaysia

1995

Mega TV

The first ever subscription-based pay television service and began transmissions on 1 November 1995

1996

ASTRO

Astro was launched in **Malaysia on 1 June 1996**. it became the country's first digital satellite television service

2023

OK Vision

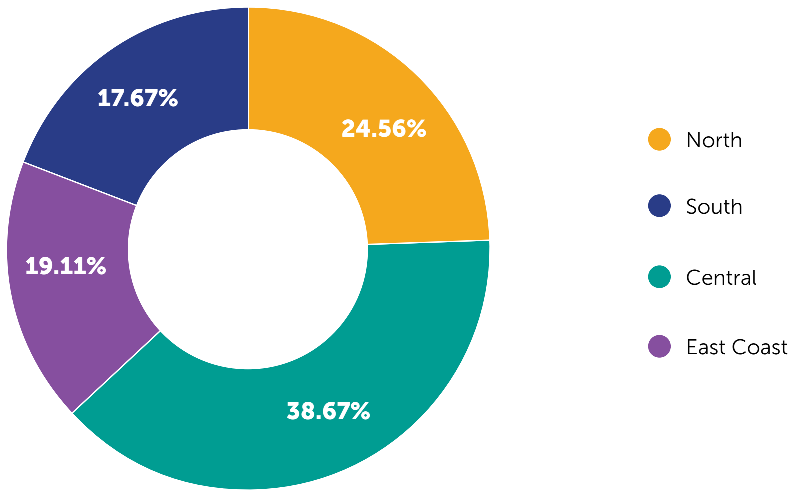
Ansat Broadcast launched OK Vision, a subscription-based digital entertainment platform in Malaysia

FTA TV AUDIENCE PROFILE

A Nielsen Consumer and Media View (CMV) study revealed that 19.4 million Malaysians in Peninsular Malaysia aged 15 and above watch content via free-to-air (FTA) TV. The gender distribution among viewers is nearly equal, with 50.02% male and 49.98% female. In terms of age demographics, 21.1% of the total audience belongs to the age group of 15 to 24 years old, reflecting the interest of younger audiences especially in entertainment, sports, and popular content related media that are often broadcast on FTA TV. Additionally, younger individuals are more likely to have flexible schedules that allow for TV viewing compared to older age groups. Meanwhile, senior citizens, representing the age group 60 years and above, constitute 16.4%. This can be attributed to older generations' preference for traditional forms of media, such as TV, which offer content such as news, dramas, and variety shows that are more suited to their interests.

On regional basis, analysis of the audience for free-to-air (FTA) TV reveals interesting trends. The Northern region accounts for 24.56% of the total audience, while the Central region, represents the largest audience share at 38.67%. This is most likely due to the presence of Malaysia's capital city, Kuala Lumpur, and other urban centres with a high population density. These areas tend to have better access to various forms of media, including FTA TV, and a greater concentration of viewers who consume TV content regularly. The higher urbanisation, greater population density, and economic activity in this region contribute to a larger FTA TV audience. Meanwhile the Southern region and East Coast region contribute nearly the same amount, with 17.67% and 19.11% of the total audience respectively, emphasising the diversity of FTA TV viewership across Malaysia.

FTA TV AUDIENCE SHARE BY REGION IN MALAYSIA



Meanwhile an analysis of audience distribution by market segments reveals distinct trends in viewership and engagement across Total Market Centres, other urban areas, and rural regions. The study found that the *Total Market Centre* constitutes the largest share of the total audience, with 34.34% of viewers. This dominance underscores the concentration of viewership in major urban centres. In contrast, other urban areas also recorded a higher viewer concentration with a significant 45.96% of the total audience. The rural areas, however, accounted for only 19.7% of the audience. These insights suggest that while *Total Market Centres* dominate in audience size, urban areas provide a balanced contribution to viewership and participation.

As for the type of occupation, PMEBs (Professional, Manager, Executive and Business Owner) recorded a significant 40.8% or 6.04 million viewers, of the total FTA TV audience, followed by students and blue-collar workers, with 14.69% and 11.4% respectively. The higher percentage in PMEBs could be due to the fact that these individuals have higher disposable incomes, more time to engage with diverse content, and may prefer television as a method for relaxation after work.

In brief, content viewers in Malaysia come from a wide range of demographic backgrounds, encompassing diverse age groups, genders, occupations, and regional locations. This rich diversity reflects the multicultural and multi-ethnic fabric of the nation. To meet the varied preferences and interests of its audience, FTA TV offers an extensive array of channels, covering genres such as news, entertainment, sports, education, and cultural programming. These channels are carefully curated to cater to the unique needs and tastes of Malaysians, ensuring that everyone, regardless of their demographic profile, can find content that resonates with their interests and lifestyle.

EXPLORING CONTENT PREFERENCES: TOP 10 FTA TV CHANNELS IN PENINSULAR MALAYSIA

According to a study conducted by Nielsen Television Audience Measurement (TAM) in 2024, TV3 Anugerah Juara Lagu was the programme that achieved the highest number of views, reaching 3.37 million views. This live, music-based programme attracted viewers seeking entertainment after a long day of work. Furthermore, Malaysians enjoy sharing experiences and watching live events, which helps create a sense of unity as people watch together, whether at home, in public spaces, or online.

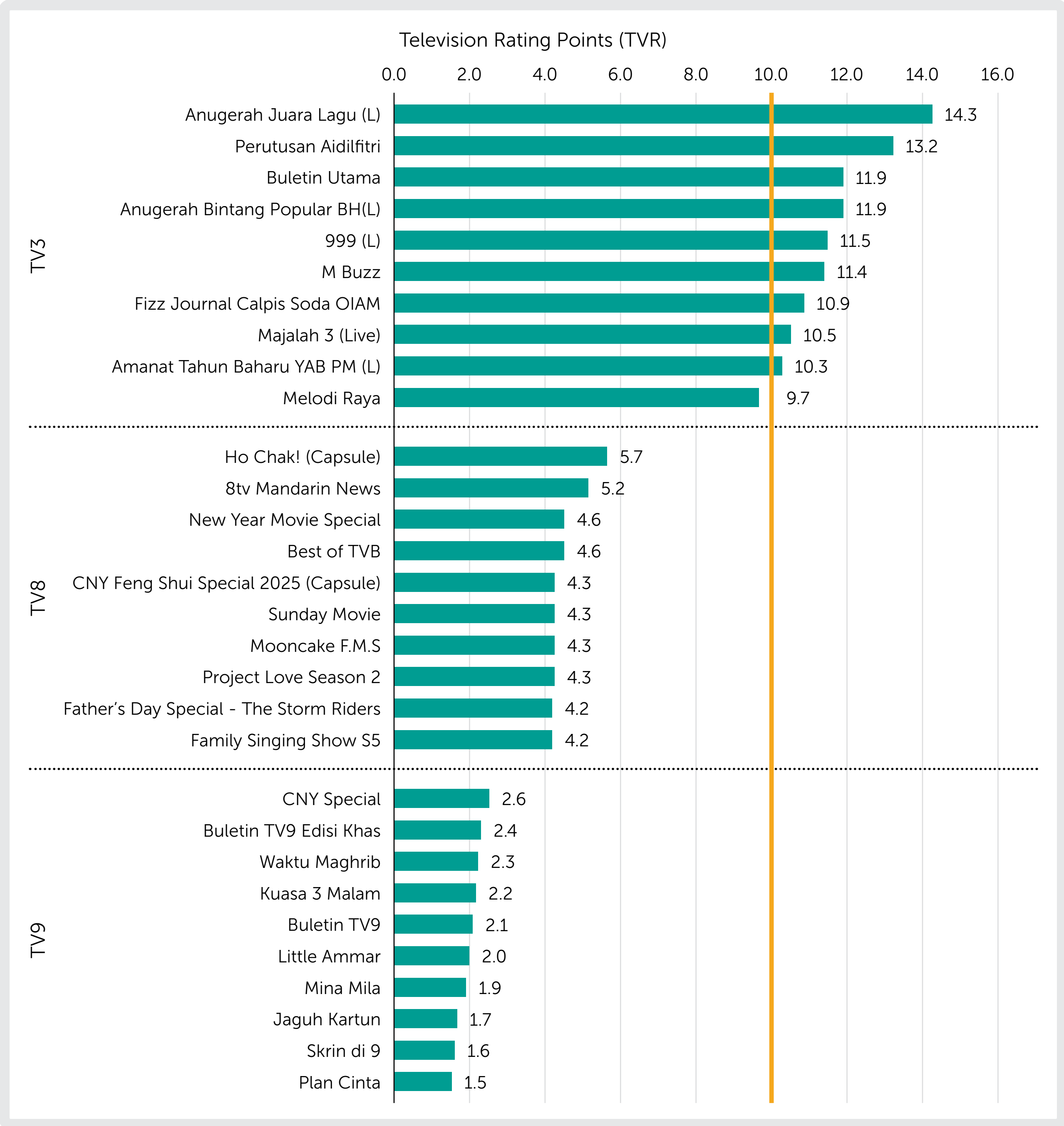
Notably, the Aidilfitri message also received a high number of views, with a total of 3.12 million views, surpassing the 2.78 million views of Buletin Utama, a news programme in Bahasa Malaysia that airs daily at 8 pm. Significantly, the three broadcast programmes that received the highest number of views were all live broadcasts, indicating that, although the country is experiencing technological changes and mobile phone usage is high among Malaysians, television remains a popular medium for obtaining reliable and up-to-date information.

Meanwhile, the second channel with the highest viewership was TV8, a Chinese-language channel that focuses on original innovation, local programmes production, and dramas from both domestic and international sources. The cooking show, Ho Chack! recorded the highest viewership in 2024, with a total of 1.33 million viewers, followed by 8TV Mandarin News and New Year Movie Special, with a total of 1.21 million and 1.09 million viewers respectively.

Subsequently, FTA channel TV9, under Media Prima Television Networks, ranked third in terms of viewership in 2024. Among the programmes with high viewership were films aired during Chinese New Year and the special edition of TV9 Bulletin, which recorded a total of 0.61 million and 0.56 million views respectively. TV9 is a Malay-language channel that offers entertainment, as well as refreshing drama and comedy, through its "Senang Terhibur" slot.

In terms of programme popularity, TVR (Television Rating Point) is a widely used metric for measuring the popularity and viewership of television broadcasts.

Based on the same study by Nielsen, TV3 topped the charts, with 9 out of their top 10 shows recording a TVR of over 10. News-related content, musical programmes, documentaries, and reality TV shows are increasingly popular and have gained significant traction, each recording double-digit TVRs compared to other shows. TVR is a critical indicator, particularly for advertisers for advertisement placement purposes, content creators, and broadcasters, as it serves as a reference point and a measure of a show's success.



Source: *Nielsen Television Audience Measurement (TAM)*
Figure 4.1: *Top 10 FTA TV channels by brand*

EXPANDING CONTENT CHOICES: ENSURING TV ACCESSIBILITY FOR PWD AUDIENCES

Television is for everyone, and ensuring equal access for persons with disabilities (PWD) is essential in creating an inclusive viewing experience. Many broadcasters now implement accessibility features such as closed captions for the hearing-impaired, audio descriptions for the visually-impaired, and sign language interpretation for key programmes. These efforts not only enhance the viewing experience for PWD but also promote greater social participation by keeping them informed and connected. As technology advances, more innovative solutions are emerging to break down barriers, reinforcing the idea that television is a platform for all.

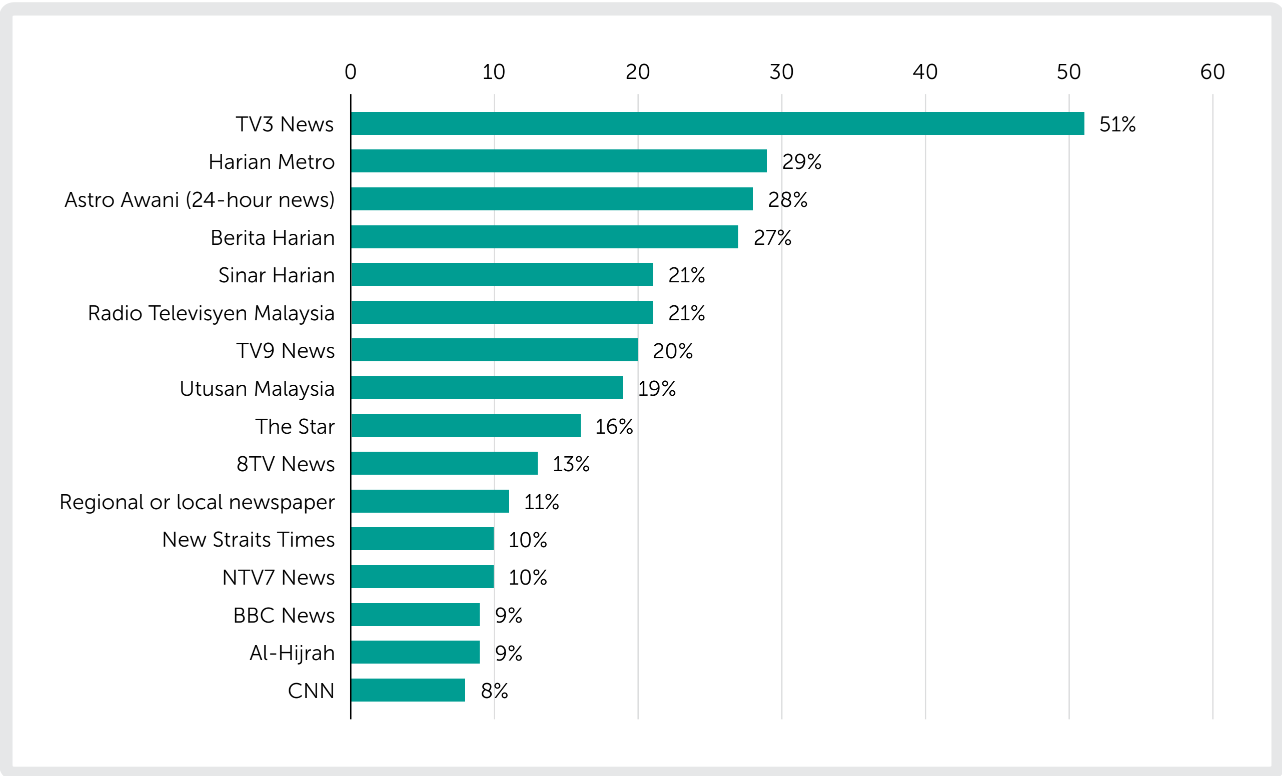
Astro is committed to inclusivity by providing content that caters to PWD, ensuring that entertainment and information are accessible to everyone. Through features such as closed captions, audio descriptions, and sign language interpretation, Astro strives to create a viewing experience that transcends barriers, allowing all audiences to enjoy and engage with their wide range of programmes. In 2024, Astro published 638.92 hours of PWD-friendly content, a slight decrease compared to 2023, which recorded 643.7 hours. Meanwhile Telekom Malaysia produced one PWD-friendly programme with a total of 187 hours of religious content which included signed language interpretation. The following table shows the PWD-friendly content published by Astro in 2023 and 2024.

	2023	2022
Malay Content		
Number of Programmes	-	2
Total Hours	-	56hrs
Examples	-	Dari Mata Turun Ke Hati Bunga Salju
Indian Content		
Number of Programmes	2	9.00
Total Hours	30hrs	55hrs
Examples	Pasanga 1 (Vinmeen Series) Dejavu 375 (Vinmeen Series)	Pasanga 2 (Vinmeen Series) Manggai Nee (Vinmeen Series)
Chinese Content		
Number of Programmes	33	0.22
Total Hours	565.70hrs	492.16hrs
Examples	The Guardians, The Land of Spirit, Mystert if Borneo	Wartime Food, Two Worlds Apart
Sports Content		
Number of Programmes	-	5 titles
Total Hours	-	3hrs & 45mins
Examples	-	Kisah Disebalik Bola (15 mins), Anti Graviti dari Ayer Keroh ke Zurich (1hr), Kisah Kami Luar Biasa (1hr), Little Legends (1hr), KL Sampai Mati (30 mins)
Astro Shaw		
Number of Programmes	5	4
Total Hours	48hrs	32hrs
Examples	Projek: High Council, Liar, Jack Yusof, Gamers Mangkuk, Riot	I.D, Framed, X-Change, Project: Exit
GenNext Content		
Number of Programmes	-	1 (promo)
Total Hours	-	30sec
Examples	-	Inilah KITA promo which used the sign language for "Inilah KITA"

CONTENT PREFERENCES IN MALAYSIA 2024: SHARE OF WEEKLY TV, RADIO, AND PRINT MEDIA CONSUMPTION BY BRAND

Through another related study by Nielsen on content consumption, it was found that 51% of respondents consume TV3 news content as their main source of information on current issues. This could be attributed to its reputation as a long-established and trusted media platform in Malaysia. TV3 provides a mix of local and international news, catering to a wide demographic. Its accessible broadcast format and alignment with viewers' language preferences further enhance its appeal. As for other channels, 28% of users obtain information through Astro Awani (24-hours channel), followed by TV9 news and 8TV news, with usage at 20% and 13% respectively. These channels cater to more niche audiences, with TV9 appealing to a Malay-speaking demographic and 8TV targeting Chinese-speaking viewers. Their inclusion in the list reflects the diversity of Malaysia's population and the tailored content offerings that resonate with specific linguistic and cultural groups

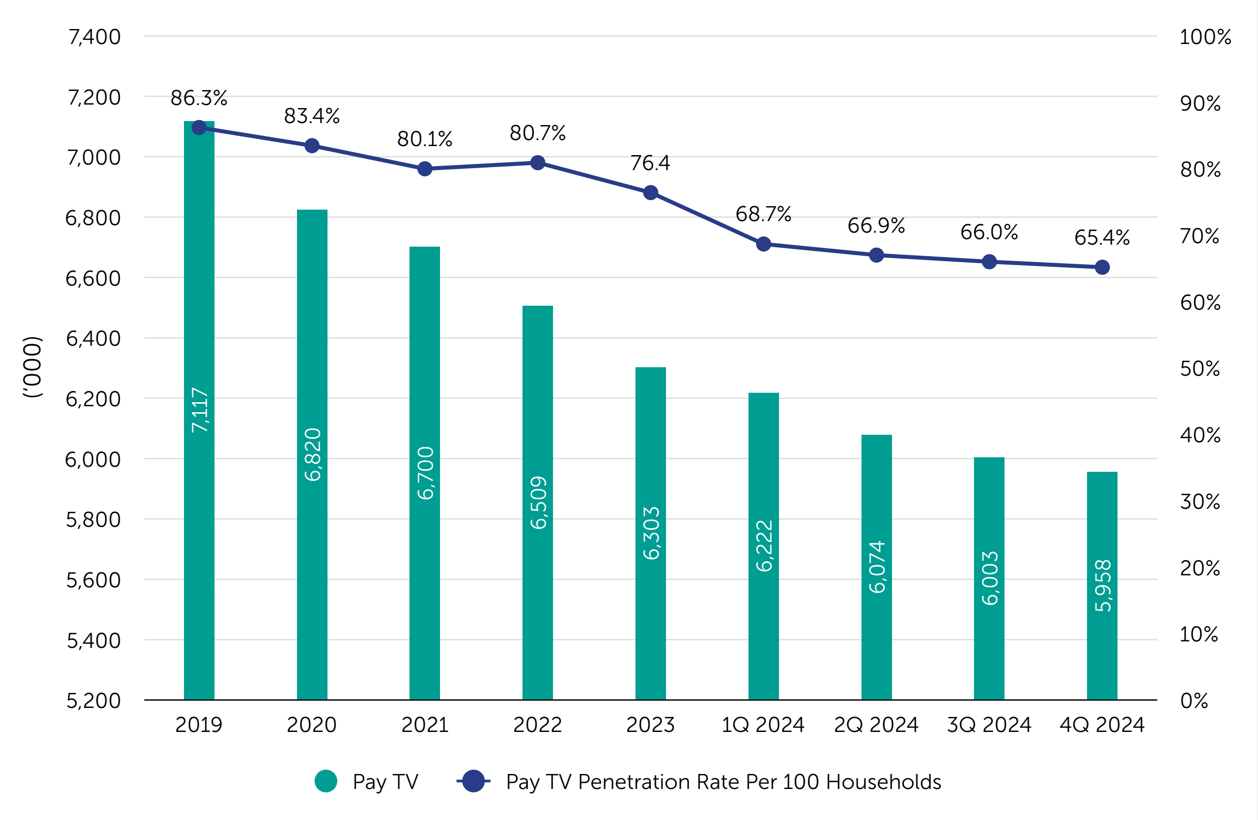
Apart from television, users also turn to print media to obtain accurate and authentic content, including Berita Harian (27%), Sinar Harian (21%) and Utusan Malaysia (19%). These print media still have a place among consumers in Malaysia and are considered as a legacy print media by many, bringing fresh and trusted content from within and outside the country to meet the demands of users from different backgrounds and demographics.



Source: *Statista*
Figure 4.2: *Weekly consumption of selected TV, radio and print media 2024 (%)*

PAY TV IN MALAYSIA

The broadcasting landscape in Malaysia is enriched by the participation of Pay TV providers, catering to the diverse content demands of consumers from various demographics. The Pay TV market in Malaysia is primarily dominated by Astro and TM Unifi TV. ASTRO is both a satellite and IPTV service provider, while Telekom Malaysia is an IPTV provider.



Source: *MCMC*
Figure 4.3: *Pay TV subscription 2019 - 4th Quarter 2024*

As at the third quarter 2024, Pay TV subscriptions recorded an impressive 6 million subscriptions, compromising 86% from Astro and 14% from Unifi TV. However, the number of Pay TV subscriptions has shown a gradual decline. In 2022, the Pay TV penetration rate per 100 households stood at 80.7%, and followed by a decreased to 76.4% in 2023. This downward trend continued in 2024, with the penetration rate dropping to 68.7% in the first quarter, 66.9% in the second quarter, and 66% in the third quarter.

In the fourth quarter of 2024, total Pay TV subscriptions continued to experience a marginal quarter-on-quarter decrease of 0.76%, with the penetration rate falling to 65.4% (Q3 2024: 66%). This decrease was influenced by several factors, including the increase in connected devices and changing consumer behaviour, particularly the shift towards consuming content via connected devices.

THE SHIFT TO STREAMING: HOW OVER-THE-TOP (OTT) PLATFORMS ARE RESHAPING MALAYSIA'S VIEWING HABITS

The rise of Over-The-Top (OTT) services, which deliver content via the Internet, has fundamentally reshaped the entertainment landscape, offering greater flexibility and accessibility compared to traditional cable or satellite Pay TV services. The flexibility offered by OTT has been a major factor to the decline in Pay TV subscriptions. Viewers are no longer bound to rigid broadcasting schedules, allowing them to tailor their entertainment experiences.

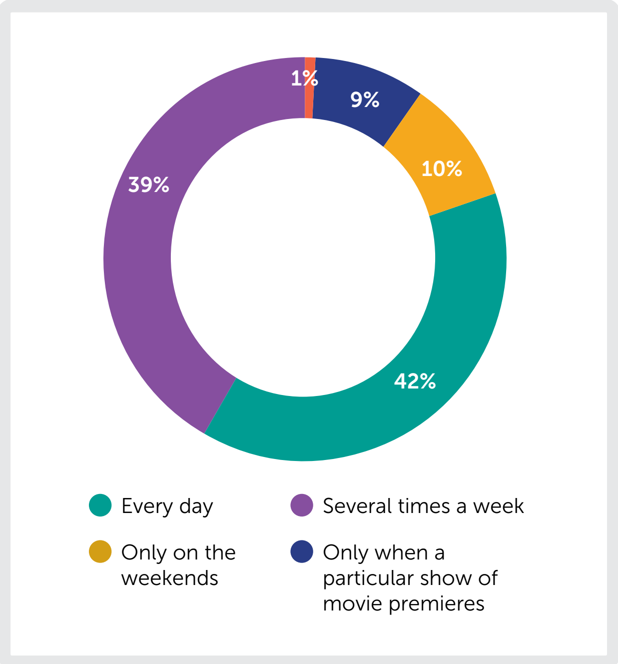
A shift in consumer preferences whereby consumers migrate to streaming application services including Subscription Video on Demand (SVOD), a model under OTT, also contributed to the decline in total number of Pay TV subscriptions in 2024. SVOD is a streaming service model in which users pay a recurring fee — usually monthly or annually — to access a library of content. Popular SVOD platforms include Netflix, Disney+, Amazon Prime Video, and HBO Go.

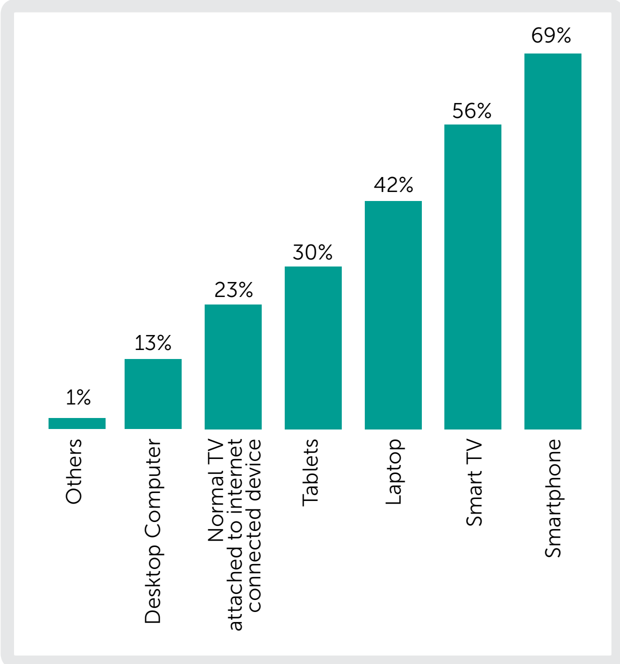
In Malaysia, SVOD has gained traction as more consumers shift from traditional Pay TV to flexible, on-demand viewing options. A study conducted by Rakuten Insight, found that users in Malaysia who subscribe to SVOD streaming services are influenced by several factors. Apart from offering more affordable services, the range of contents offered by SVOD streaming service providers is also much higher compared to Pay TV services providers.

In addition, Rakuten Insight also believes that placement of advertising factors is also one of the key reasons consumer switch to SVOD streaming services, as these services are ad-free. The phenomenon of users shifting towards streaming applications is seen to be increasingly widespread and becoming global. The table below lists the several reasons why users move to SVOD services.

No.	Reasons for subscribing to SvoD streaming service providers in Malaysia	Percentage (%)
1	It offered a larger variety of content than cable and satellite TV	49
2	I wanted to enjoy video content without advertisements	48
3	It was affordable	46
4	I wanted the flexibility of being able to watch the content according to my schedule and not the broadcasting schedule	38
5	I wanted to be able to watch video content on the go on my mobile devices (e.g. during my commute on the app on my phone)	34
6	I wanted to watch the original content from that particular streaming service provider	31
7	It is in trend to have one	16
8	My friend/family member wanted to share an account with me	15
9	Others	3

Among the things that have been affected by the user transition to SVOD is how users consume content. According to related study, almost half, or 42% of streaming app users consume content every day, while 39% use streaming apps several times a week. In terms of usage method, 69% of users access content via mobile phones.

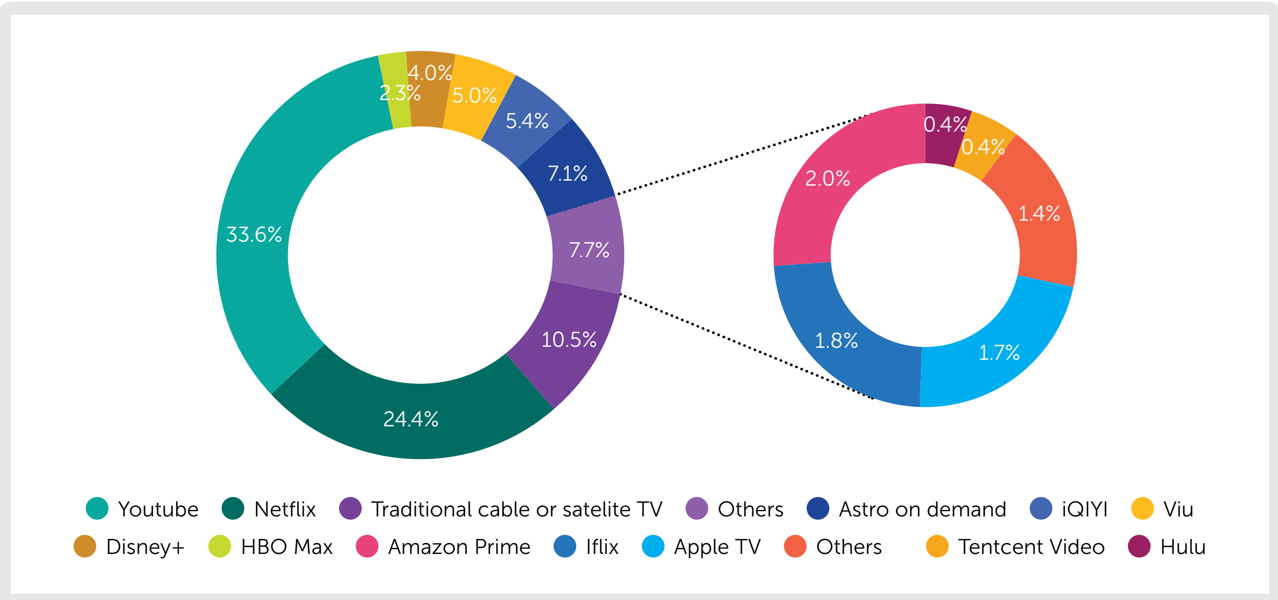




Source: Statista
***Figure 4.4:** Frequency of streaming SVOD content in Malaysia 2024*

Source: Statista
***Figure 4.5:** Devices used for watching video on SVOD streaming services Malaysia 2024*

Meanwhile, content consumption via smart TVs also recorded an encouraging figure of 59%, which is supported by the sale of smart TVs bundled with streaming apps. Apart from smart TVs, 23% of users consume content through traditional TVs that connect to devices such as game consoles and laptops



Source: Statista
***Figure 4.6:** Preferred movie or TV streaming platforms in Malaysia 2024*

From the perspective of using streaming applications services, according to Statista, YouTube and Netflix dominate the streaming market, accounting for more than half of the market share. YouTube, which is known for its extensive collection of user-generated content, music videos, and original programming, dominates the business with a 33.6% market share.

Meanwhile, Netflix, known for its huge selection of movies, TV shows, and critically acclaimed original series, follows closely behind with 24% of the market. This dominance reflects their capacity to cater to a wide range of viewer tastes, provide smooth user experiences, and adapt to shifting consumption patterns. Together, these platforms set the standard for the streaming industry, setting trends and dictating content strategy around the world.

STAYING RELEVANT IN THE STREAMING AGE: PAY-TV'S BATTLE AGAINST OTT

Aiming to reduce and restrain users from terminating their Pay TV subscriptions and migrating to streaming application services, Astro and TM Unifi have implemented several proactive measures, including introducing bundle packages of existing services with streaming services at affordable prices. In strengthening their customer base, TM Unifi offers their customers a streaming application or SVOD service aimed at increasing user reach and retaining existing customers. As of 2024, Unifi TV offers a total of 19 streaming applications to meet user demand, including Max, YOUKU, an online video service provider from China that offers a variety of classic content including dramas, movies, animations, and children's shows. In addition, to attract demand from Indonesian users living in Malaysia, Unifi TV also offers a video that brings popular Indonesian content such as soap operas and live broadcasts of BRI Liga 1. The list of streaming applications offered by Unifi TV is as follows:

• Max	• SIAR
• YOUKU	• MangoTV
• Vidio	• Disney+ Hotstar
• Durioo+	• BBC Play
• Netflix	• SPOTV NOW
• WeTV	• ZEE5
• Amazon Prime Video	• Simply South
• TVB Anywhere+	• YuooTV
• iQIYI	• beIN Sports Connect
• Viu	

Meanwhile, Astro offers a range of video options, including its premium Pay-TV service, Astro; the prepaid TV alternative, NJOI; and the standalone freemium OTT app, Sooka. Astro has implemented a strategy to curb customer churn to SVOD streaming services by partnering with SVOD streaming application service providers and becoming an aggregator of at least 15 subscriptions to SVOD services, including Disney+ Hotstar, Netflix, Viu, iQIYI, WeTV, HBO Go, and the group's own Astro Go.

With the main goal is to strengthening its core Pay TV business while expanding into related areas like broadband, Sooka, addressable advertising, and enterprise solutions, Astro aims to attract new customers by offering a hassle-free experience, helping viewers combat the fatigue of juggling multiple streaming services. With the inclusion of streaming apps, including popular names like Netflix, Disney+ Hotstar, and BBC Player, neatly integrated into its Ultra and Ulti Boxes, Astro creates a 'one-stop' hub for regional, international, and local content, including Astro Originals and live sports.

In 2024, Astro also introduced 'Astro One' Pay TV packs, with an affordable starting price at just under RM50. This strategic move not only enhances the customer experience but also makes Astro a more appealing choice compared to standalone OTT services or pirated alternatives, resulting in an increase in customers ARPU to RM99.70.

Recognising the growing demand for seamless connectivity, Astro strategically integrates broadband with its video services, giving customers access to its On Demand streaming library of 107,000 shows and the full functionality of its Ultra and Ulti Boxes. By bundling broadband with entertainment packages, Astro aims to attract new customers while retaining existing ones by offering a more convenient, all-in-one solution. This approach not only enhances user experience but also combats competition from OTT platforms by reducing the need for multiple subscriptions. In 2024, this strategy resulted in a 21% growth in Astro's broadband customer base, highlighting the success of its bundled offerings and cross-selling efforts to both residential and enterprise customers.

Sooka, Astro's standalone OTT app, is rapidly gaining momentum among millennials, thanks to its seamless mobile and smart TV-friendly design. With 20 Free Ad-supported Streaming TV (FAST) channels, the platform saw a 23% surge in monthly active users (MAUs), reaching 1 million, alongside an impressive 86% growth in paying subscribers. Enhancing the streaming experience, the Sooka TV Stick—paired with the Sooka Premium Plan—offers a one-stop destination for all your favourite shows and live sports, making content access smoother and more convenient for Astro customers. Strengthening its presence, Sooka has forged over 20 strategic partnerships with telcos and super apps, expanding its footprint and solidifying its position in Malaysia's competitive streaming landscape. According to data.ai (formerly known as App Annie), Sooka was recognised as the fastest-growing premium SVOD platform in Malaysia for 2024, surpassing major global players in both user engagement and time spent on the platform. With its youthful appeal, flexible plans, and strong focus on local content, Sooka is more than just a streaming platform—it is a bold step forward in Astro's journey to stay relevant and connected to Malaysia's evolving digital audience.

Nevertheless, Astro's strategic blend of diverse content, broadband integration, and user-friendly streaming options demonstrates its commitment to evolving with the times — ensuring it remains a key player in Malaysia's dynamic entertainment industry.

DIGITAL TERRESTRIAL TELEVISION BROADCASTING SERVICES

THE JOURNEY OF MYTV: REVOLUTIONIZING FREE DIGITAL BROADCASTING IN MALAYSIA

MYTV Broadcasting Sdn Bhd is a company responsible for managing and delivering free Digital TV broadcast infrastructure services via Digital Terrestrial Television (DTT) platform in Malaysia through the MYTV brand that offers free TV and radio channels. With a great vision, which is to provide high-quality digital television to every Malaysian household for free. This ambitious mission was motivated by a desire to close the digital divide and promote a sense of community. MYTV sought to connect and strengthen Malaysian communities by guaranteeing that everyone, regardless of location or economic class, had access to modern broadcasting technologies. MYTV remains a beacon of innovation and accessibility, providing a diverse spectrum of TV and radio content to consumers across Malaysia. Until 2024, MYTV offer 15 TV channels and 16 radio channels.

Source: *MYTV Broadcasting Sdn Bhd*

MYTV MANA-MANA: ANYTIME AND ANYWHERE VIEWING EXPERIENCE

Taking advantage of the expanded coverage area and strong mobile penetration rate, MYTV has launched the MYTV Mana Mana application, a streaming app that allows users to watch television content whenever and wherever they choose. MYTV Mana-Mana is more than just a streaming service; it also serves as an important community hub. By giving free access to a wide range of local and international programming, MYTV Mana-Mana helps to bridge the digital divide and fosters a sense of togetherness and connection among Malaysians.

MYTV Mana-Mana has had a high level of user engagement since its introduction in July 2023. Whereas of end 2024, MYTV Mana-mana recorded a total of 12,328,525 number of views and a total of 579,297 downloads. Hence, to expand its user base, MYTV Mana-mana has formed a partnership with Proton, which allows MYTV Mana-Mana to be accessible via the built-in entertainment system of Proton's vehicle, the X70. The integration of the MYTV Mana-Mana application into Proton X70 vehicles is expected to revolutionize the in-car entertainment experience, offering a diverse range of digital content at the touch of a button. This initiative aligns with MYTV's broader strategy to expand its digital broadcasting services across various platforms and devices.

MYTV Mana-Mana provides 23 local and international television channels, 22 live radio stations, and more than 1,800 video-on-demand titles. Users can start watching content or listening to the radio in the car and another advantages this internet-based radio streaming provided is that user doesn't have to change FM frequencies while traveling interstate.

Until 2024, MYTV digital terrestrial television reached 7.5 million viewers last year (+19.4% year on year), while the Mana-Mana app, have a high level of user engagement since its introduction in July 2023. Whereas of end 2024, MYTV Mana-mana apps recorded a total of 579,297 downloads, nine million cumulative views, and over 180,000 active monthly users. The apps is available for download via the Google Play Store and the Apple App Store, as well as through the website https://www.mana2.my.

TV

Live TV channels
(13 local, 10 international)
23

Radio channels
23

Video-On-Demand (VOD) contents
23

Source: *MYTV Broadcasting Sdn Bhd*

DRIVING MYTV MANA-MANA ADOPTION WITH STRATEGIC CAMPAIGNS & PROMOTIONS

To further increase public awareness on the FTA TV on Digital Terrestrial TV platform, MYTV has enter a partnership with Keretapi Tanah Melayu Berhad (KTMB) and Bubbles O2 with the objectives to enhance the travel experience for passengers on KTMB's Electric Train Service (ETS) business class coaches. The MYTV Mana-Mana app, which is now available on all business class coaches, offers TV and radio channels to KTM passengers. Additionally, Bubbles O2 will provide naturally oxygenated mineral water to passengers, adding a touch of luxury to their journey. This initiative reflects KTMB's commitment to delivering quality and innovative services, especially for long-distance travellers.

Source: *MYTV Broadcasting Sdn Bhd*

Apart from KTMB, MYTV also conduct an engagement with Proton. On 26 November 2024, MYTV unveiled its cutting-edge Infotainment Head Unit (IHU) application, igniting excitement in both the broadcasting and automotive sectors. This revolutionary platform enables consumers to seamlessly access MYTV services via the Proton X70 automobiles' infotainment system. MYTV's innovative creation not only improves the in-car entertainment experience but also sets a new benchmark for digital broadcasting and automotive technology integration, providing consumers on the go with ease and accessibility.

Since May 2023, MYTV Broadcasting Sdn. Bhd. (MYTV) has been championing a nationwide on-ground event 'Siri Jelajah MYTV'. This initiative focused on distributing decoders to targeted areas of B40 residents, particularly Program Perumahan Rakyat (PPR), ensuring that everyone can access to TV and radio content while offering high-quality entertainment without subscription fees.

Source: *MYTV Broadcasting Sdn Bhd*

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In year 2024, MYTV successfully conducted on-ground events at 120 locations, completing a total of 168 locations nationwide with a total of 60,139 MYTV Set-up box distributed. Through these efforts, MYTV has significantly raised awareness about its services, expanded Digital Terrestrial Television (DTT) connectivity, and promoted the MYTV Mana-mana OTT platform. This commitment to provide a seamless entertainment experience ensures that viewers have access to an impressive array of channels and radio stations, all at no cost. Through this campaign, MYTV is not only transforming the entertainment landscape but also fostering a more connected and informed community across Malaysia.

CONNECTING COMMUNITIES: STRENGTHENING FREE-TO-AIR TV ACCESS VIA MASTER ANTENNA TELEVISION (MATV) AT PROJEK PERUMAHAN RAKYAT (PPR)

In expanding audience reach, free-to-air digital TV services have been made available via Digital Terrestrial Television networks nationwide, making it an effective tool for disseminating information through TV and radio contents to large number of audiences.

However, access to quality MYTV services for audiences living in high-rise buildings is limited, where factors such as weak signals due to building obstructions are also a cause of audiences not being able to enjoy the maximum level of service. To overcome this issue, the availability of broadcasting infrastructure in high-rise buildings using the MATV system has facilitate residents in the PPR areas to access free digital TV service without to incur additional cost of purchasing private antennas and installation. This can contribute to improving connectivity to free digital TV services in PPR areas. However, from observations, there are constraints in the connectivity of free digital TV services for residents in PPR areas due to malfunctioning or outdated MATV infrastructure.

Therefore, with objective to enhance the connectivity of Free-To-Air TV services and strengthen the connectivity of Free-To-Air TV services in PPR areas, the MCMC organized a workshop with representative from various groups from Government and private sector including Ministry of Communication, Kementerian Perumahan Dan Kerajaan Tempatan (KPKT), local government authority and Real Estate & Housing Developers' Association Malaysia (REHDA). Following the workshop, several outcomes were identified to be executed:

a. To review the existing Technical Code (TC) of Technical Standard and Infrastructure Requirements for Broadcast Network Facility (TSIR Part 2: MCMC MTSFB TC G008 2016). The existing TC require amendments and enhancements to incorporate new elements, including technical specifications, regular maintenance proposals, audit requirements, system testing standards for MATV, and the necessity of skilled personnel to manage the MATV system effectively. The TC will be reviewed in 2025 by Malaysian Technical Standard Forum Bhd (MTFSB) under Broadcast Technology Working Group.

b. To conduct survey on the resident's awareness and accessibility to MATV and FTA TV and to create promotional and awareness plan on the availability of FTA TV for PPR residence via MATV system. During the workshop, the management reported no complaints received from the residence pertaining to faulty MATV which may be due to lack of awareness by the residence about the availability of MATV system in the PPR.

c. To implement a pilot project for MATV system at several PR in Klang Valley. Objective of the pilot project is to verify the availability and capability of MATV infrastructure and identifying potential solutions for the issues related to MATV system.

Four (4) PPRs under the supervision of Jabatan Perumahan Negara (JPN) and Dewan Bandaraya Kuala Lumpur (DBKL) were selected for this pilot project. On July and August 2024, in collaboration with JPN and DBKL, MCMC together with MYTV have conducted site visits to the selected PPRs. Among the key findings from the site visit are:

A

The MATV system is currently non-functional and has not been maintained by building owners. It uses a channelizer system that only supports analogue broadcasting and requires an upgrade to a digital broadcasting receiver system.

B

Some residents access MYTV services through a decoder and Digital TV connected with an indoor antenna.

C

An online survey revealed that most residents are aware of the free MYTV service and are interested in watching TV channels through the MYTV platform.

To address these challenges, a report detailing the findings was presented and submitted to KPKT and the Mayor of Kuala Lumpur. The report emphasized the necessity of repairing and maintaining the MATV system in PPR areas under this pilot project. By upgrading the system and ensuring its proper upkeep, authorities can enhance television access for residents, particularly those in the B40 community, ultimately bridging the digital divide and improving information accessibility.

FUTURE BROADCASTING TECHNOLOGY STUDY: EVALUATING THE VIABILITY AND POTENTIAL OF 5G IN FUTURE BROADCASTING TECHNOLOGY

The study on Future Broadcasting Technology aims to look at and examine new technologies in the field of Broadcasting that have importance and need for viability, especially from a technical point of view and business opportunities for the TV and Radio broadcasting industry. The study was structured into two distinct phases, phase 1 and phase 2.

Phase 1: Future Broadcasting Technology Study

The study on Future Broadcasting Technology is one of the initiatives proposed by the industry during the Malaysian Broadcasting Industry Lab (MBIL) session. This study aims to look at and examine new technologies in the field of Broadcasting that have importance and need for viability, especially from a technical point of view and business opportunities for the TV and Radio broadcasting industry.

Understanding the importance of involving all stakeholders in this study, MCMC had leveraged on the expertise of the Malaysian Technical Standards Forum Bhd (MTSFB) platform to obtain participation from multiple stakeholders from broadcasters, mobile operators, academia, vendor and consultants and form a study group with the objectives to evaluated the technologies and benefits from the use of 5G technology for the broadcasting industry based on 3GPP standards from Release 16 onwards. The study group also managed to engage with various stakeholders from the international level such as from Qualcomm, Rohde and Schwarz and 5G-MAG Forum.

This study which ran throughout 2023 found that, there are four potential technologies have been identified based on two categories (unicast service) and broadcast service as follows:

Unicast Service
• 5G New Radio for Broadcasting
• 5G Media Streaming (5GMS)

Broadcast Service
• 5G Broadcast via Broadcast Transmitter
• 5G Multicast Broadcast Service (5GMBS) via Mobile Base Station

The Phase 1 of the study report of Future Broadcasting Technology had successfully completed and been published on 24 April 2024 in MCMC Website.

Phase 2: Future Broadcasting Technology Study

Meanwhile the 2nd phase of the Future Broadcasting Study focuses on the practical implementation of 5G Broadcast technology, which involves conducting test-bed sessions with the objectives to explore the significant potential of 5G Broadcast for commercialization and to establish a solid foundation for demonstrating its value to industry stakeholders, thereby driving future investments. The objectives of test-bed sessions are:

a.	Evaluate the performance of 5G Broadcast technology.
b.	Identify potential use cases and applications for 5G Broadcast technology.
c.	Identify the potential business models and review the regulatory instruments if the 5G Broadcast technology has been considered for commercialisation.

In ensuring that this test-bed achieves its goals, MCMC has established collaborations with several strategic partners from home and abroad. Among them are broadcasters, network operators, government agencies and technology providers. Furthermore, to appoint Rohde & Schwarz Malaysia Sdn Bhd as the provider of the 5G Broadcast Test-Bed facility in Malaysia, as well as supported by the expertise of the MTSFB Working Group in ensuring comprehensive guidance and expertise throughout the Phase 2.

MCMC will organize the 5G Broadcast Day Showcase. The event aims to showcase and highlight the outcomes of the Test-Bed sessions, providing a platform for stakeholders to experience the potential and capabilities of 5G Broadcast technology firsthand. Expected to be completed by the end of Q2 2025, phase 2 serves as a critical success measure, laying the groundwork for expanding research and development into a 5G Broadcast Proof of Concept (PoC) in Malaysia, further accelerating the adoption and commercialization of 5G Broadcast technology.

BROADCAST TALK SERIES

The Broadcast Talk Series (BTS), organized by MCMC is a dynamic platform for knowledge sharing and industry discussions on information related to broadcasting involving the industry and relevant stakeholders with the objectives to drive the development and growth of Malaysia's broadcasting industry.

The first broadcast series in 2024, For BTS 1/2024, The Broadcasting Development Department, through MCMC's Digital Society Research Grant (DSRG), has sponsored four insightful studies on the uses, motivations, and gratifications of free-to-air TV viewers across various regions in Malaysia. These studies, conducted by prestigious universities, delve into the enjoyment, fulfilment, and sense of reward that viewers derive from TV programs.

Multimedia University (MMU) began the regional research in Sabah in 2021 and Sarawak in 2023. Meanwhile, University Sultan Zainal Abidin (UNISZA) and University Utara Malaysia (UUM) conducted studies in the East Coast and Northern Regions of Peninsular Malaysia, respectively, both in 2023. The findings from these comprehensive studies were presented during a webinar titled "Insights into Malaysian Television Consumption," organized by MCMC on April 30, 2024. This event showcased the key findings and recommendations from each university, focusing on:

- The demographic profile of the audience.
- Audience free-to-air TV usage patterns, gratification levels, and content preferences.
- Recommendations for stakeholders to shape the future of television consumption.

This series have identified key insights from the four research studies, focusing on accessibility and viewership via free-to-air (FTA) platforms and channels, as well as preferred channels and content genres:

Accessibility and Viewership:

- The studies highlighted how many viewers access and engage with FTA channels through MYTV, shedding light on the reach and effectiveness of this platform.

Preferred FTA Channels:

- The research identified the most popular FTA channels among viewers, providing a clear picture of audience preferences.

Content and Genre Preferences:

- The studies also explored the types of content and genres that viewers most enjoy on FTA channels, offering valuable insights into programming trends and viewer satisfaction.

	Sabah	**Sarawak**	**East Coast** (Terengganu, Kelantan & Pahang)	**Northern** (Kedah, Perlis, Penang & Perak)
Access to MYTV + Watch via MYTV	**40.3%**	**40.3%**	**40.3%**	**40.3%**
Top 5 FTA channels watched in MYTV	**#1** TV3 **#2** SUKAN **#3** BERITA **#4** DRAMA sangat **#5** OKEY	**#1** TV3 **#2** tvS **#3** BERITA **#4** 八度空间 **#5** A tv	**#1** TV3 **#2** tv1 **#3** tv2 **#4** TV ALHIJRAH **#5** A tv	**#1** TV3 **#2** 9 **#3** A tv **#4** TV ALHIJRAH **#5** tv1
Preferred content/ genre watched	Enjoy a blend of local content that combines **engaging entertainment with informative news** channels	Love diving into a variety of content that **entertains, informs, educates, and keeps viewers engaged**	Prefer **more local shows that showcase East Coast location and products, highlight the lifestyle, use the dialect, and feature local actor**s	Favor **content that entertains, inspires with religious theme, brings laughter with comedy, excites with sports, and embarks on adventures with travelogues**

These findings offer a comprehensive understanding of the current landscape of FTA television consumption in Malaysia, guiding future strategies for broadcasters and content creators. Free-to-air (FTA) channels offer a wealth of gratification factors for viewers across Malaysia, catering to diverse needs and preferences:

Sabah:

- FTA channels provide thrilling entertainment, health insights, economic updates, and mind-stimulating content, making them a reliable source of information that keeps audiences both entertained and informed.

Sarawak:

- Viewers primarily tune into FTA channels to stay updated on global and local news, relying heavily on them for current issues. There's also a keen interest in lifestyle, health, and well-being content, reflecting the diverse viewing preferences of the region.

East Coast (Terengganu, Kelantan & Pahang):

- FTA channels offer significant economic benefits with no subscription fees and flexible viewing options. They provide social connection, relaxation, and a way to pass the time. Known for their quality shows, these channels keep viewers informed on various issues.

Northern (Kedah, Perlis, Penang & Perak):

- Viewers are highly satisfied with FTA channels, especially appreciating the content quality and emotional resonance. While the balance of informational and entertainment content is well-received, there's potential for enhancing the overall viewing experience through improvements in aesthetics and variety.

Meanwhile 2nd Broadcast talk series was held September 25, 2024, titled "Responding to Change: Is the Industry Doing Enough? Are We Fast Enough?" addressed the rapidly evolving landscape of television advertising in Malaysia, where broadcasters and advertisers face both unprecedented challenges and emerging opportunities.

Bringing together 126 industry professionals, the session featured a diverse group of stakeholders, including broadcasters, advertisers, media agencies, content producers, and government representatives including representatives from the Ministry of Communications, and MCMC personnel. The objective of this discussion is to bridge the gap between TV broadcasters and advertisers by fostering a deeper understanding of each other's needs and expectations. By tackling key industry concerns, the session encouraged collaboration and innovation, equipping stakeholders with the insights and strategies needed to adapt to the shifting advertising landscape. Among the findings from the 2nd broadcast series are the following:

1. A significant 74% of advertising expenditure is now directed towards digital platforms, signaling a decline in traditional media channels such as TV and print.

2. To stay relevant, broadcasters need to harness technology and AI, prioritize compelling local content, and produce major live events that captivate audiences.

3. Adopting a Netflix-like approach, broadcasters should invest in OTT platforms, deliver personalized content, and prioritize mobile accessibility. Emphasising on-demand, short-form, and interactive content is essential for keeping audiences engaged and entertained.

4. Encouraging less restrictive regulation and promoting self-regulation within the industry can foster creativity and growth. Additionally, investing in storytelling and scriptwriting is crucial for enhancing content quality and captivating audiences.

RADIO BROADCASTING LANDSCAPE OVERVIEW

Historically, since Malaysia's pre-independence era, radio served as a tool for disseminating news and fostering national unity by inspiring and motivating the spirit of nationhood, especially during critical periods such as the struggle for independence and the early years of nation-building.

Nowadays, radio broadcasting is still relevant and acts as a reliable source of current information in Malaysia, and has been a cornerstone of communication and entertainment. From its early days to its modern form influenced by digital innovation, radio has consistently played a vital role in informing, entertaining, and uniting Malaysians.

Radio broadcasting in Malaysia encompasses a wide range of languages to fulfil the needs of Malaysians of all ethnicities and races. It also promotes cultural and social cohesiveness, where multilingual programming ensures that all ethnic groups are represented, fostering mutual understanding and tolerance. Special programmes during festive seasons such as Hari Raya Aidilfitri, Christmas, Chinese New Year, and Deepavali highlight Malaysia's diverse cultural heritage.

Radio also acts as an important educational and public awareness tool. During the COVID-19 epidemic, radio stations communicated critical health information and updates, highlighting their usefulness as credible sources of information during emergencies.

RADIO BROADCASTERS DEVELOPMENT IN MALAYSIA

The Media Prima Audio network includes five radio brands under it, namely Hot FM, Kool 101, Molek FM, Fly FM, and Eight FM. A study conducted by Nielsen Consumer & Media View (CMV) found that radio remains an important part of Malaysians' daily lives. The report also stated that Media Prima's radio station, Hot FM, has managed to record 3.8 million listeners each week, a clear indication of its widespread appeal and strong connection with its audience. This success can be attributed to several factors such as the offering of an engaging mix of music, entertainment, lively talk shows with famous influencers, and interactive segments that resonate with a broad audience.

Additionally, among the factors identified to also influence the growth in listenership is the implementation of several programmes conducted outside the studio, such as the Bekpes Hot 5KM Fun Run and outside broadcasts on a train.

Meanwhile, radio stations Fly FM and Kool 101 also experienced an encouraging growth in the number of listeners, with a double-digit increase of 12.8% and 65.4% respectively, bringing the total number of listeners for both radio stations to a total of 2.8 million listeners. This surge can be attributed to rebranding efforts and the introduction of fresh, informative, and socially relevant content that appeals to a wide range of listeners.

Another brand under Media Prima Audio, Molek FM, also recorded an increase of 202,000 number of listeners, bringing its total listenership to 1.07 million. The station remains a favourite brand in the East Coast of Malaysia due to its ability to connect with its audience through cultural programmes, thus contributing to its growth. Meanwhile, the radio station Eight FM, which focuses on the Chinese-speaking community, is increasingly gaining ground among listeners, having successfully recorded a significant increase to 363,000 listeners.

Another major radio broadcaster, Astro Radio, has also established itself as the go-to choice for listeners in Malaysia. In 2024, Astro Radio recorded an average of 15 million listeners per week, with 72%[2] of its audience hailing from Peninsular Malaysia. As a multilingual broadcaster, Astro Radio caters to Malaysia's diverse audience with stations across the three major languages—Malay, Chinese, and Tamil—alongside English, delivering content that resonates

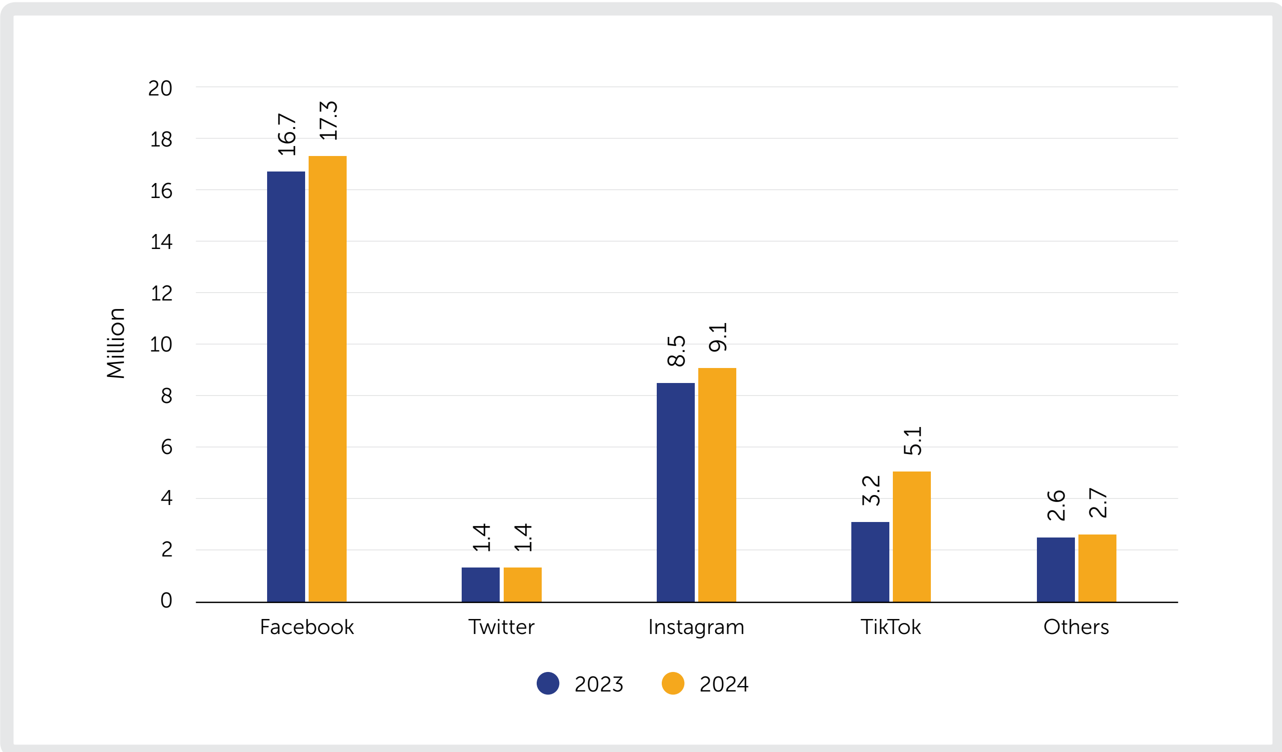
[2] *GFK Radio Audience Measurement Wave 2*

with listeners from all walks of life. Its diverse portfolio of stations ensures that every segment of society is represented, offering tailored programming that reflects the unique tastes, cultures, and preferences of its listeners.

Astro Radio's social media presence on digital platforms continued to expand in 2024, with growth in followers across all major platforms. Facebook remained to be the most popular platform, with 16.7 million users in 2023 to 17.3 million in 2024. Instagram's user base increased significantly, rising from 8.5 million to 9.1 million. TikTok saw the greatest increase, climbing from 3.2 million to 5.1 million, indicating a move towards short-form video content. Meanwhile, Twitter stayed constant at 1.4 million users, while other platforms experience a slight uptick from 2.6 million to 2.7 million.

This rise demonstrates Astro Radio's developing digital approach for engaging consumers across several media. This inclusive approach has made ASTRO Radio a household name, fostering a deep connection with audiences across linguistic and cultural boundaries.

In an effort to stay relevant among listeners and attract new audiences, in 2024, Astro Radio has embraced a new direction, prioritising engaging and meaningful content for its audience. As part of this shift, MY FM has discontinued prank calls and replacing them with more impactful storytelling.



Source: *Sprout Social*
Figure 4.7: *ASTRO Radio social media presence 2023-2024 (million)*

4

In the Malay listener segment, ERA, a brand under Astro Radio, has reached a major milestone, surpassing 1.9 million followers on TikTok, cementing its position as the most-followed radio station in Malaysia. ERA has recorded an average of 4.8 million weekly listeners, followed by SINAR FM with 4.4 million listeners. This high number of listeners is contributed by several factors, including the provision of music content that suits the listeners' tastes, engaging talk shows, and interactive segments that appeal to targeted listeners.

Another ASTRO Radio brand, THR GEGAR has also made significant strides, attracting 1.8 million listeners by offering a blend of traditional and contemporary Malay music that appeals to listeners on the East Coast. Meanwhile, ZAYAN has seen a substantial 75% increase in its audience, reaching 657,000 listeners, due to its focus on modern Islamic content and inspirational programming. ZAYAN's continuous efforts received recognition when it was honoured with the prestigious Anugerah Sahabat Dakwah at the Anugerah Pendakwah Negara 2024, recognising its outstanding contributions in spreading positive values and Islamic teachings through media.

For the English language segment, HITZ tops the charts with 2.2 million listeners, driven by its energetic and youthful content, including popular music hits and engaging morning shows, followed by MIX and LITE FM with 829,000 and 637,000 listeners respectively.

For the Chinese radio category, MY FM, MELODY and GOXUAN continue to be the favourites, drawing in 2.4, 1.24 and 0.285 million listeners respectively, with their engaging mix of contemporary Chinese music, entertainment content, and cultural programmes which appeal to younger Chinese listeners. Furthermore, RAAGA remains the dominant force in Tamil radio, consistently being the top choice with a total of 1.48 million listeners. This success is driven by its engaging mix of Tamil music, news, and entertainment content that echoes with the Tamil-speaking community.

As the media landscape evolves, Astro Radio is taking proactive steps to future-proof its operations and enhance audience engagement. In collaboration with GfK, it introduces "Radio 360," a groundbreaking methodology set to redefine audience measurement in the Malaysian radio industry. By integrating advanced listener analytics, this innovative approach enhances accuracy, reliability, and modernises the way radio engagement is measured. This partnership underscores Astro Radio's unwavering commitment to credibility, innovation, and transforming the radio experience into a seamless, data-driven audio journey, ensuring its continued relevance in an increasingly digital world.

THE FUTURE OF RADIO BROADCASTING IN MALAYSIA: OPPORTUNITIES AND INNOVATION

As the media landscape evolves at a rapid pace, radio broadcasting in Malaysia must embrace change and innovation to remain relevant and impactful. The ability to adapt to new technologies, understand shifting audience behaviours, and deliver compelling content is key to ensuring radio's enduring appeal. With the country's diverse cultural tapestry and growing digital adoption, the prospects for radio broadcasting are promising. Below are some opportunities that can shape the future of radio broadcasting in Malaysia:

1. Digital Transformation Adoption

- The digital revolution is reshaping how audiences consume media, and radio is no exception. By expanding digital radio services and bolstering their online presence, stations can capture the attention of tech-savvy listeners. Streaming platforms, mobile apps, and podcasts offer avenues to reach younger audiences while creating new revenue streams through subscription services, targeted advertising, and exclusive content.

2. Harnessing the Power of Data Analytics

- The usage of data analytics makes understanding listeners' behaviour achievable. By leveraging insights into audience demographics, preferences, and listening habits, radio broadcasters can tailor content to specific groups. Personalised playlists, targeted advertisements, and interactive campaigns can deepen audience engagement and foster loyalty.

3. Fostering Collaborative Partnerships

- Collaboration is key in today's interconnected media world. Partnering with other media outlets, social media influencers, and brands can expand a station's reach and diversify its content offerings. These partnerships can also bring fresh perspectives and ideas, ensuring programming remains innovative and relevant to a broad spectrum of listeners.

4. Investing in Talent Development

- The strength of radio lies in its people—presenters, producers, and content creators. Investing in training and professional development ensures that broadcasting talent stays ahead of industry trends and delivers high-quality programmes. By nurturing creativity and innovation within their teams, stations can maintain a competitive edge and consistently captivate their audiences.

5. Exploring Niche Markets

- Catering to specialised interests offers a way for stations to stand out in a crowded marketplace. Whether it's focusing on specific music genres, regional languages, or specialised talk shows and podcasts, targeting niche markets can attract dedicated and loyal audiences. This approach not only differentiates stations but also fosters a sense of community among listeners with shared interests.

6. Integrating Artificial Intelligence (AI)

- AI has the potential to revolutionise the radio industry in Malaysia. From automating workflows to curating personalised playlists, AI can enhance efficiency and enrich the listener experience. For example, AI-driven recommendation systems can suggest music or programmes based on individual tastes, while AI-powered voice assistants can offer real-time interaction, making radio more dynamic and engaging.

HOW ARTIFICIAL INTELLIGENCE (AI) CAN BOOST RADIO BROADCASTING INDUSTRY

The application of artificial intelligence (AI) is rapidly transforming industries worldwide, including radio broadcasting. For radio broadcasting, AI offers opportunities to enhance content creation, analyse audience behaviour for better audience understanding, streamline operations, and deliver personalised listener experiences. Astro Radio, for example, is actively integrating AI technologies to enhance its broadcasting and advertising capabilities. Stations like Mix and Lite have incorporated AI into their station jingles, ensuring a more dynamic and engaging listening experience.

Beyond jingles, Astro Radio is also exploring the use of text-to-speech AI to generate client demo content efficiently. This innovation enables the creation of high-quality voiceovers for advertisements, reducing production time while maintaining professional standards. By leveraging AI, Astro Radio aims to deliver more personalised, cost-effective, and creative audio solutions for both listeners and advertisers.

AI driven content scheduling

is revolutionising the radio industry so that, by using automation and AI, the radio stations can analyse historical data and use data on listener to get in-depth insights of their audience's behaviours including their needs and wants. This technology for example, will allow broadcasters to identify patterns of which age groups or demographics are more likely to engage with particular topics or genres at different times of the day.

For radio broadcasting, AI has the potential to refine the crafting of content, interpret audience activity to improve audience comprehension, optimise operational processes, and even offer customised content to listeners.

Voice recognition and Natural Language Processing (NLP)

are transforming the way radio broadcasters engage with their audiences and advertisers. By leveraging these advanced technologies, stations can identify key words and phrases during live interactions, such as listener calls, to uncover new opportunities and insights.

Real-time analysis of content using NLP allows broadcasters to better understand audience preferences and behaviours, creating a foundation for more targeted and effective engagement strategies. This capability extends to advertising, where NLP can revolutionise ad placement by identifying optimal moments to introduce advertisements that align with the context of the conversation or broadcast.

This data-driven approach not only enhances the reach and relevance of advertisements but also ensures a seamless integration into the listening experience. As a result, radio stations can achieve stronger audience engagement and create significant value for advertisers, making it a potential game-changer in the broadcasting landscape.

The introduction of AI-powered virtual radio hosts and chatbots

is reshaping how listeners engage with radio stations, offering innovative ways to enhance interaction and accessibility. Media Prima Audio's AI DJ, Aina, exemplifies this evolution. Equipped with an extensive music database, Aina can create and mix music in real time, tailoring playlists to suit listeners' moods and providing personalised music recommendations.

AI chatbots and voice technologies are also stepping into roles traditionally held by human hosts, from hosting talk shows to engaging with listeners in real-time interactions. These advancements are particularly valuable in addressing operational challenges, such as filling gaps during odd working hours or serving as a backup during emergencies when human DJs are unavailable.

While these technologies enhance efficiency and engagement, the human touch remains irreplaceable. The emotional connection and relatability that human DJs bring are essential elements that AI cannot fully replicate. However, by combining the strengths of AI-driven solutions and human hosts, radio stations can forge a stronger bond with their audiences, ensuring a dynamic and interactive listening experience.

CHARTING A BRIGHT FUTURE: THE ROAD AHEAD FOR RADIO BROADCASTING IN MALAYSIA

Radio broadcasting in Malaysia stands at an exciting crossroads, where tradition meets innovation. As a medium that has long been cherished for its ability to deliver true and authentic information and news to all listeners across all corners of Malaysia, connect communities, and bridge cultural divides, radio continues to adapt and thrive in an era of rapid technological change. By embracing advancements in digital technology, leveraging data and artificial intelligence, and fostering talent, the industry is well poised to secure its place as a vital component of Malaysia's media landscape.

The integration of AI-driven tools, for instance, can enable broadcasters to create tailored and personalised content, curate playlists based on listener preferences, and automate routine workflows, thus freeing up resources for creative ventures.

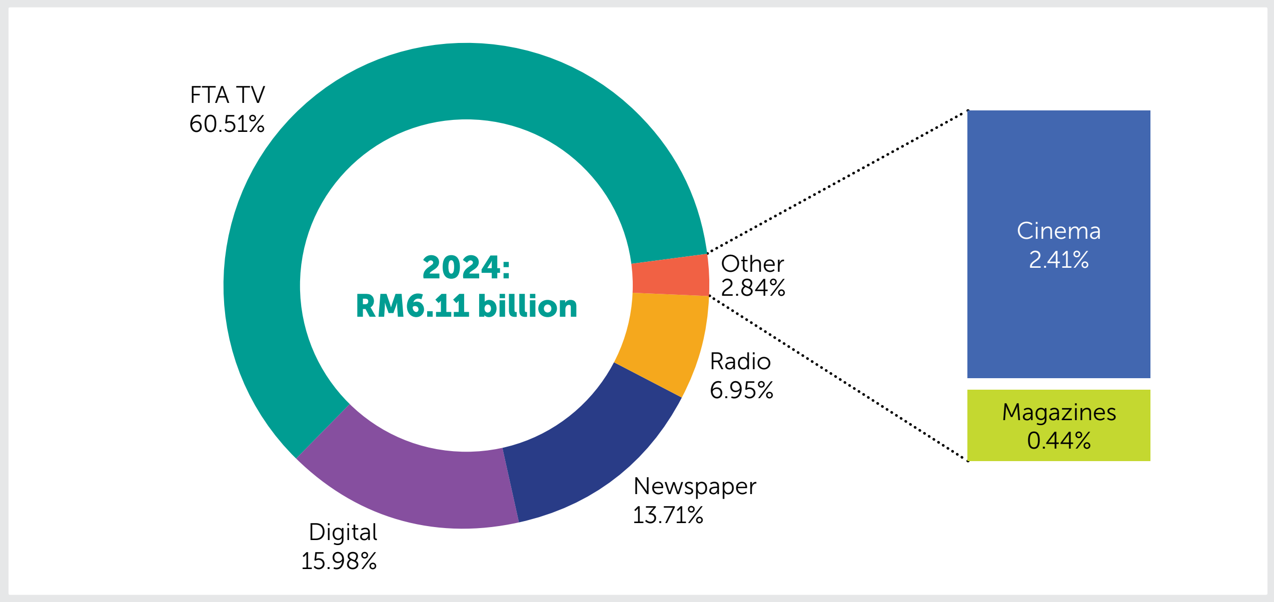
Expanding digital broadcasting capabilities is equally crucial. With the rise of streaming platforms and mobile apps, radio stations have the opportunity to engage with tech-savvy audiences in real-time, offering a seamless blend of live and on-demand content. Podcasts, exclusive digital programmes, and interactive campaigns are just a few ways broadcasters can expand their reach and diversify revenue streams.

ADVERTISING EXPENDITURE (ADEX) IN MALAYSIA: CHOOSING THE RIGHT MEDIUM FOR TARGETED ADVERTISING DISTRIBUTION

Advertising expenditure (Adex) refers to the total amount of money spent on advertising across numerous media channels. It provides vital insights into the advertising environment, revealing how firms invest in selling their products and services to customers. It comprises costs for advertisement through mediums such as television, digital, print (such as newspapers and magazines), radio, out-of-home (such as billboards and transit ads), and other media.

Adex is an important indicator of Malaysian economic activity and marketing trends, demonstrating the competitiveness and dynamism of the advertising industry. Businesses and marketers may maximise their campaign success by understanding their audience, reviewing Adex data, and applying the best marketing strategies by choosing the best medium that best suits their needs and effectively communicates their messages to their target audience.
In 2024, FTA TV became the most favoured medium for marketers to distribute content relating to their products or services, accounting for 60.51% or RM3.69 billion of total advertising spending.

Meanwhile, marketers also favour the digital medium because of its benefits such as broad reach, targeted capabilities, measurable effects, and the region's high mobile penetration rate. The growing smartphone usage also influenced the accelerated migration to digital platforms, allowing marketers to communicate with their audiences at any time and from any location. A considerable amount of RM0.98 billion, or 15.98% of the total advertising spending, was recorded in 2024. This reflects a rising emphasis on using online platforms like social media, search engines, and other digital channels to better engage audiences and achieve marketing success.



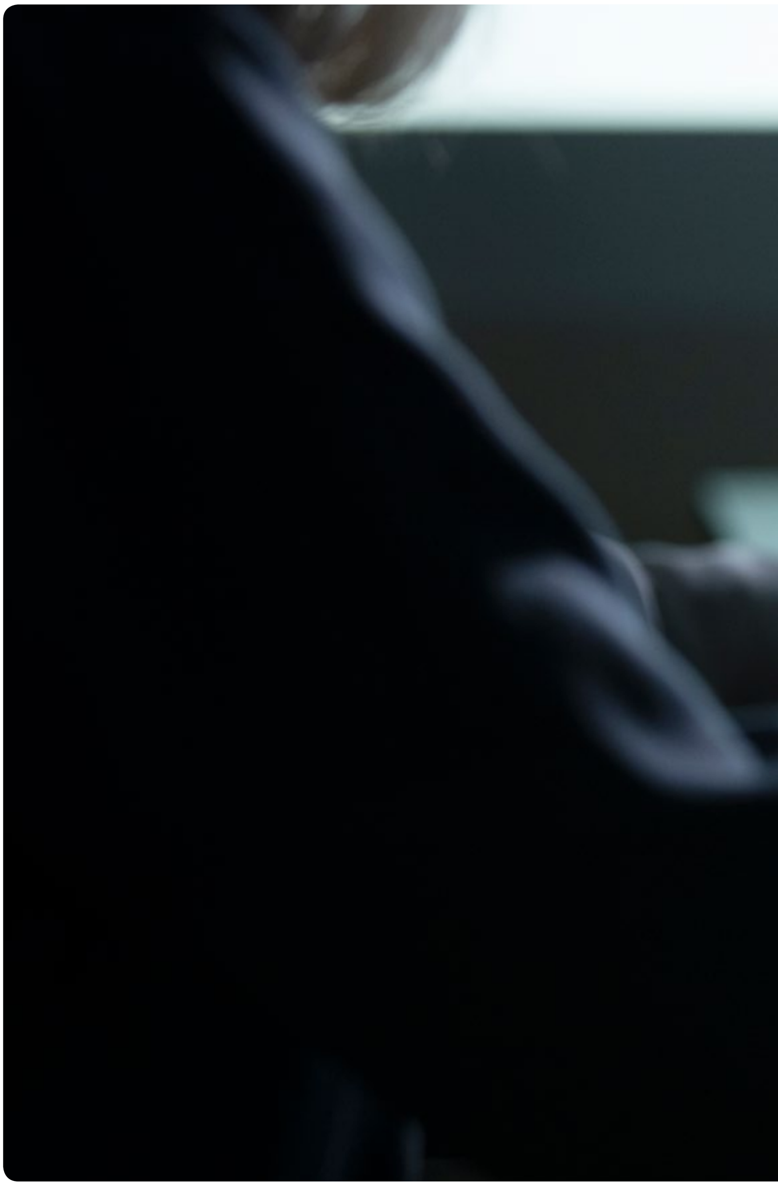
Source: *Nielsen Audience Measurement*
Figure 4.8: *Ad Spent by Media in Malaysia 2024*

Aside from that, traditional advertising mediums such as newspapers and radio remain effective in delivering content or material to specific audiences. Despite the rise of digital advertising, traditional platforms are still effective because of their trustworthiness, established audience base, and ability to target certain groups.

Newspapers are highly regarded for their in-depth reporting and high levels of readers' trust, whereas radio provides an entertaining, real-time medium for listeners to connect while taking advantage of the high radio usage in the morning and evening on weekdays, when most listeners listen to the radio in their cars on their way to and from work. Reflecting their lasting importance, RM0.84 billion and RM0.42 billion were spent on advertising through newspapers and radio, respectively. Thus, these traditional mediums continue to play an important role in advertisers' plans for targeting broader customer groups.

Advertisements through cinema and magazines continue to be effective tools for marketers in reaching out to certain targeted demographics, providing marketers with unique chances to engage with niche audiences in focused and meaningful ways. Cinema advertising offers an immersive experience that captures moviegoers' undivided attention in a distraction-free setting, making it an excellent choice for high-impact campaigns.

Magazines, on the other hand, allows marketers to reach well-defined audiences through visually appealing and high-quality content. In Malaysia for the year 2024, marketers allocated a total of 2.41% and 0.44% of overall 2024 advertising spending on cinema and magazines, respectively, thus emphasising their significance in providing targeted and memorable messaging.



THE FUTURE OF MALAYSIA'S ADVERTISING INDUSTRY IN THE DIGITAL ERA

Moving forward, Malaysia's advertising market is expected to grow steadily, with digital advertising formats taking the lead. This growth is projected to be aided by the increased use of digital platforms, the growing impact of social media influencers, and the application of data-driven strategies. These characteristics reflect current trends, such as the extensive usage of mobile devices and increased Internet penetration across the country.

As AI is poised to revolutionise personalised marketing by leveraging predictive analytics to deliver highly targeted and effective advertisements, AI can be used to predict consumer behaviour and preferences using complex algorithms, allowing marketers to create personalise content and hence increase consumer engagement. Furthermore, AI-powered content creation tools are expediting the development of commercials, lowering costs and time while maximising creative materials. With improved data analysis, AI is providing more insights regarding campaign performance and audience engagement.

Additionally, the digital economy is expected to contribute 25.5% of Malaysia's GDP by 2025[3], demonstrating its critical role in driving economic growth. This growth is projected to expand spending on digital advertising as firms benefit from digital transformation. Meanwhile, video content, influencer marketing, and programmatic advertising are expected to receive a major share of advertising budgets due to their success in attracting audience attention and producing measurable outcomes. These advances herald an exciting period of innovation and potential in Malaysia's advertising scene.

[3] *The Star, Stronger ADEX Showing, 7 Oct 2024*

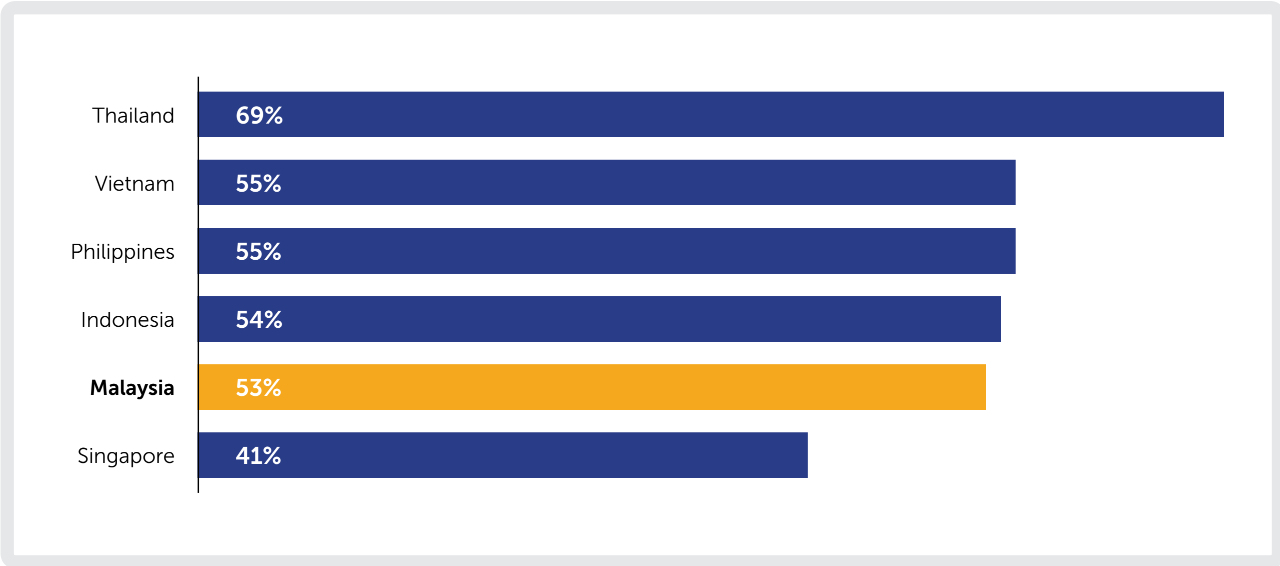
HARNESSING INFLUENCE: THE EVOLVING ROLE OF SOCIAL MEDIA INFLUENCERS IN MALAYSIA'S ADVERTISING INDUSTRY

Building on the discussion of advertising expenditure (Adex), it's clear that brands are constantly seeking the most effective ways to allocate their marketing budgets. As consumer behaviour shifts towards digital platforms, a significant portion of Adex has moved online, with social media emerging as a powerful tool for brand visibility and engagement. In this landscape, influencer marketing has gained remarkable traction, offering a more personal and relatable way to connect with target audiences.

The term "influencer" has become increasingly widely used recently, particularly in social media marketing. According to Merriam-Webstar, an influencer is an individual who exerts influence: a person who inspires or guides the actions of others. In the marketing field, influencer is a person with the ability to influence potential buyers of a product or service by promoting or recommending the products or services on social media such as Facebook, TikTok, YouTube, or Instagram.

Previously, influencers were those who had made a name for themselves in the industry, such as celebrities including famous singers, actors, or athletes, whose star power could instantly capture public attention. Their endorsements often came with hefty price tags, making influencer marketing a luxury only big brands could afford. Nowadays, however, the rise of social media has democratised influence — anyone with a unique voice or character, engaging content, and a loyal following can become an influencer. From niche content creators to viral sensations, these individuals often have large, dedicated followers on platforms like Instagram, TikTok, YouTube, and Facebook. Influencers are now categorised based on their follower count, each playing a unique role in digital marketing strategies, offering brands more targeted and authentic ways to connect with their audiences.

Nano Influencers	
1K - 10K followers	Typically everyday individuals with a small but highly engaged audience. They are seen as relatable and authentic.
Micro Influencers	
10K - 100K followers	Often niche experts or content creators with loyal followings. They offer a balance of reach and strong audience interaction.
Macro Influencers	
100K - 1M followers	These influencers have a broader reach and are ideal for brand awareness campaigns. They often have a more polished online presence.
Mega or Celebrity Influencers	
1M+ followers	High-profile figures or celebrities with massive followings. They are best for large-scale campaigns aimed at maximum exposure.



Source: *Cube*
Figure 4.9: *Share of consumers whose purchase decisions were positively impacted by influencer recommendations in Southeast Asia as of August 2024, by selected country*

Influencers primarily promote content related to their areas of expertise or interests, such as tourism, fashion, beauty, computer gaming, cooking, fashion, and other specialisations to their social media followers.

Social media influencer recommendations have significantly impacted consumer purchase decisions in Southeast Asia, with Malaysia recording 53% of consumers influenced by digital endorsements. While Thailand leads at 69%, Malaysia's strong position highlights the growing trust in influencer-driven marketing within the country. This trend reflects the increasing reliance on social media personalities for product insights, shaping purchasing behaviours across various industries. With Malaysia's digital landscape continuing to evolve, brands have a key opportunity to leverage influencer marketing to engage and convert consumers effectively.

Looking forward, in today's digital age, influencer marketing has emerged as a game-changer for brands looking to connect with their target audience in authentic and impactful ways. With the projected marketing value reaching USD 24 billion in 2024 and expected to grow further to USD 32 billion by 2025[4], social media influencers have become a powerful force in the digital marketing landscape. Firms and marketers increasingly recognise their value, not only for their ability to reach niche audiences but also for their influence in shaping consumer behaviour.

[4] *Influencer Marketing Hub, Influencer marketing market size worldwide from 2015 to 2025 (in billion U.S. dollars)*

Chapter 5:

ONLINE AND COMMUNITY SERVICES

This chapter highlights the rapid growth of Malaysia's e-commerce sector, driven by technological advancement and secure platforms. It also outlines the evolving role of the National Information Dissemination Centre (NADI) in disseminating information, advancing education, enhancing digital skills, and creating economic opportunities for rural and underserved communities. Together, these developments reflect Malaysia's commitment to strengthening online growth and fostering inclusive community empowerment.


70%

KEY HIGHLIGHTS 2024

NATIONAL INFORMATION DISSEMINATION CENTRE (NADI)

1,065
Total number of NADI

1.7 million
Registered NADI members

8 July 2024
Launch of NADI Smart Service

224,872
Participants of NADI Smart Service programmes

E-COMMERCE

RM1.2284 trillion
Total revenue

Shopee, Lazada and Mudah
Top 3 e-commerce marketplaces

Fashion, groceries/ snacks and home care products
Most purchased items online

DIGITAL SIGNATURE

RM25.2 million
digital certificates were issued in 2024

86.91%
of Digital Certificates issued in 2024 were **utilised by the government sector**

Pos Digicert Sdn Bhd was the leading issuer in 2024, with 21.04 million digital certificates issued

E-COMMERCE IN MALAYSIA

Malaysia's e-commerce sector has recorded robust growth in recent years, driven by increased consumer confidence in the security of online transactions, high broadband penetration, widespread ownership of connected devices, reliable delivery services, and the availability of diverse and competitively priced products. This growth is further supported by positive customer experiences and favourable demographic factors, such as age and income.

Supported by government policies, Malaysia recorded 10.67[1] million e-commerce users in 2024. E-commerce revenue grew by 4% in the first nine months of the year to RM918.2 billion, with the highest quarterly revenue recorded in the second quarter at RM309.8 billion. However, revenue dipped slightly in the third quarter by 0.6%, to RM307.9 billion before increasing by 0.7% in the fourth quarter, compared to the previous quarter, and by 3.7% year-on-year. For the full year of 2024, Malaysia's e-commerce sector recorded total revenue of RM1.2284 trillion[2].

Source: *Department of Statistics Malaysia (DoSM)*
Figure 5.1: *E-Commerce Revenue 2022–2024*

[1] *Statista: Number of Users of E-Commerce in Malaysia 2019-2029 (in millions)*
[2] *BERNAMA, Sektor Perkhidmatan Naik 6.3 Peratus, Catat Hasil Tertinggi Baharu RM2.5 Trilion Pada 2024*

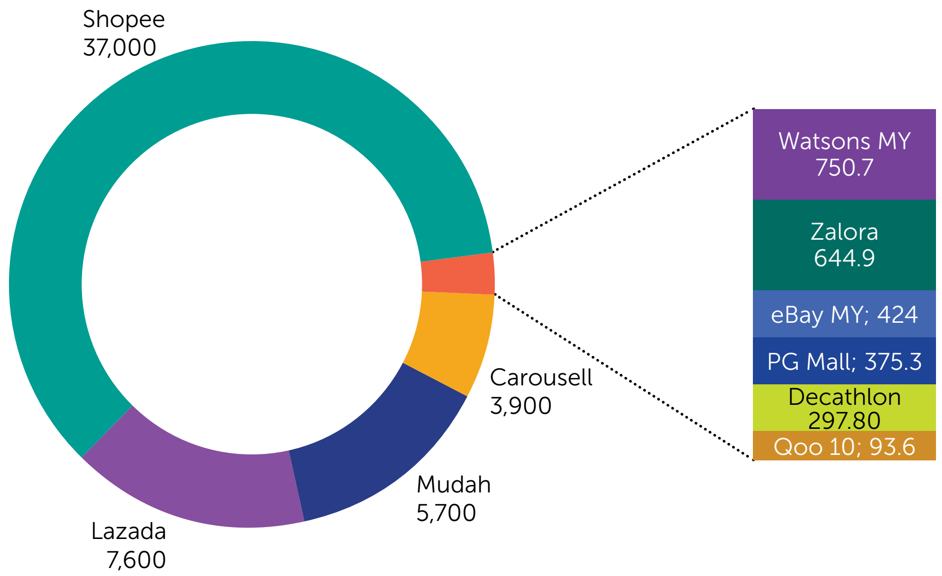
LEADING THE DIGITAL CART: TOP ONLINE SHOPPING PLATFORMS IN MALAYSIA

Through targeted campaigns, Malaysian e-commerce users have continued to actively purchase products and services via websites and major platforms such as Shopee, Lazada, and various other online marketplaces. In 2024, Shopee remained the dominant e-commerce platform in Malaysia, averaging 37 million monthly visits and significantly surpassing its competitors. Lazada followed in second place with 7.6 million visits, while Mudah and Carousell MY recorded 5.7 million and 3.9 million, respectively. Other platforms such as Watsons MY (750.7k), Zalora (664.9k), eBay MY (424k), and PG Mall (375.3k) registered smaller but notable traffic. Additionally, Decathlon (279.8k) and Qoo10 (93.6k) rounded out the list.

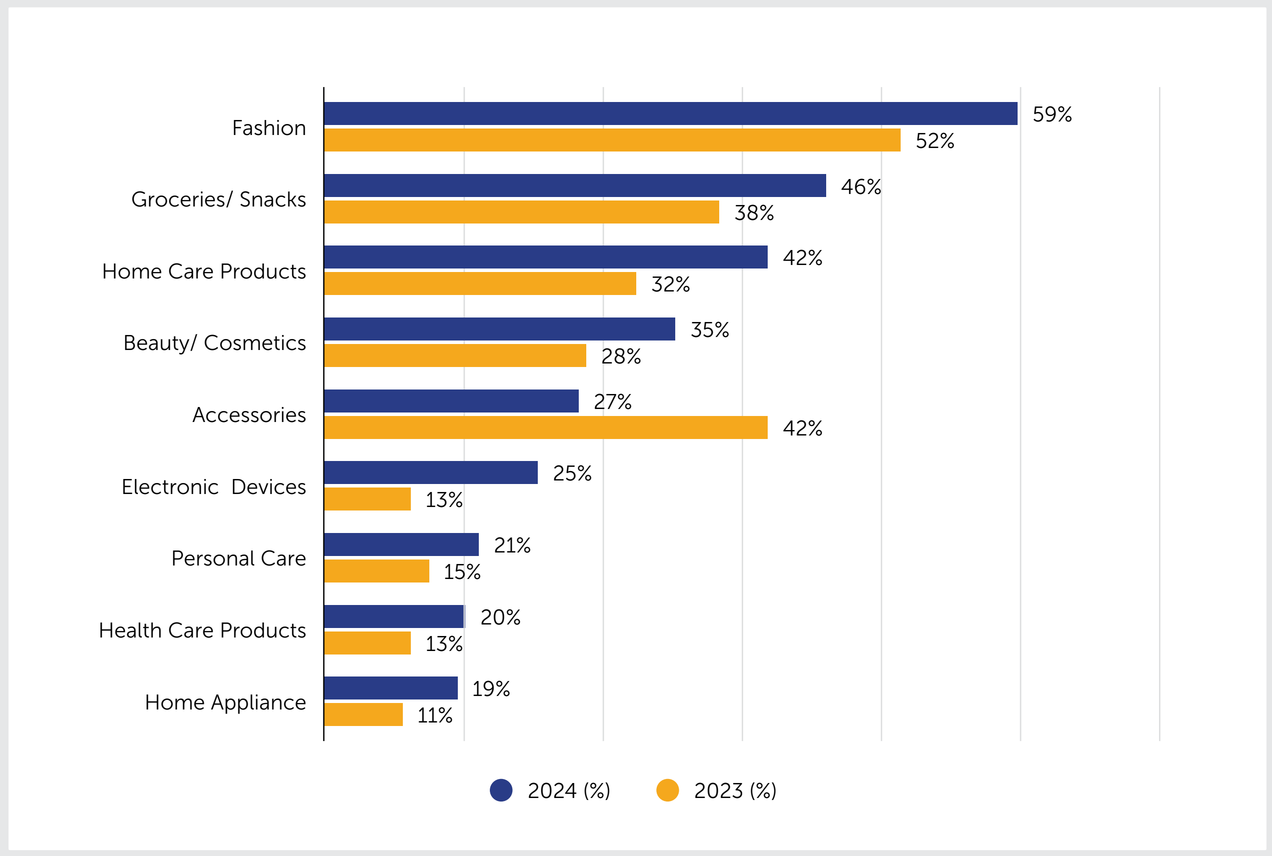
In terms of items purchased, the chart illustrates the categories of products bought by Malaysians on e-commerce platforms in 2023 and 2024. Fashion remained the most purchased category, increasing from 52% in 2023 to 59% in 2024. Groceries/snacks also grew in popularity, rising from 38% to 46%. Meanwhile, home-care products saw a significant jump, reaching 42% in 2024 and matching accessories, indicating growing interest in household-related purchases. Beauty/cosmetics and personal care items also recorded moderate increases, reflecting continued consumer focus on personal grooming and wellness.

Furthermore, purchases of electronic devices rose significantly from 13% to 25%, possibly driven by increased market demand. This includes the growing need for online education, where students and parents are investing in devices to support e-learning and digital skill development. Additionally, ongoing digitalisation and hybrid work trends may have encouraged more individuals to upgrade or purchase laptops, webcams, headphones, and other digital tools.

Categories such as healthcare products and home appliances recorded the lowest levels of online purchases, although both saw slight growth. Overall, the data reflects a steady increase in online shopping habits among Malaysians, with a strong emphasis on fashion, daily essentials, and home-related items, highlighting shifting consumer priorities and deeper digital retail penetration.



Source: *tmogroup.asia*
Figure 5.2: *Most Visited E-Commerce Sites in Malaysia in 2024, Monthly Traffic (in 1,000 clicks)*



Source: *Statista*
Figure 5.3: *Item Purchased on E-Commerce Platforms by Malaysians 2023-2024 (%)*

MCMC'S ROLE IN ADVANCING E-COMMERCE AND CONNECTED INFRASTRUCTURE

Through targeted campaigns, Malaysian e-commerce users have continued to actively purchase products and services via websites and major platforms such as Shopee, Lazada, and various other online marketplaces. In 2024, Shopee remained the dominant e-commerce platform in Malaysia, averaging 37 million monthly visits and significantly surpassing its competitors. Lazada followed in second place with 7.6 million visits, while Mudah and Carousell MY recorded 5.7 million and 3.9 million, respectively. Other platforms such as Watsons MY (750.7k), Zalora (664.9k), eBay MY (424k), and PG Mall (375.3k) registered smaller but notable traffic. Additionally, Decathlon (279.8k) and Qoo10 (93.6k) rounded out the list.

In terms of items purchased, the chart illustrates the categories of products bought by Malaysians on e-commerce platforms in 2023 and 2024. Fashion remained the most purchased category, increasing from 52% in 2023 to 59% in 2024. Groceries/snacks also grew in popularity, rising from 38% to 46%. Meanwhile, home-care products saw a significant jump, reaching 42% in 2024 and matching accessories, indicating growing interest in household-related purchases. Beauty/cosmetics and personal care items also recorded moderate increases, reflecting continued consumer focus on personal grooming and wellness.

THE INTERNET USERS SURVEY (IUS) 2024

The Internet Users Survey (IUS) 2024, conducted by the Malaysian Communications and Multimedia Commission (MCMC), provides a data-rich lens into the current and emerging behaviours of Malaysia's Internet users. As Malaysia accelerates its transformation into a digitally driven economy, the findings of this survey contribute meaningfully to shaping national policy, informing corporate strategy and deepening academic research on digital inclusion, resilience and innovation.

This year's results reveal a nation in rapid digital ascent, yet one marked by growing disparities, evolving risks and shifting public expectations. From the widespread adoption of 5G to the surge in cashless payments, Internet users in Malaysia are embracing digital tools at an unprecedented speed. At the same time, the report uncovers new challenges that demand urgent attention, such as rural-urban connectivity gaps, generational divides in digital literacy, rising exposure to cyber threats, and a notable decline in trust in online information. The narrative weaves together a clear arc, from infrastructure readiness to behavioural immersion, economic digitalisation, personal safety and the erosion of trust. It captures both Malaysia's digital advancements and the ongoing challenges that shape its development priorities.

5G Adoption: Expanding Access, Bridging Gaps

The survey highlights a strong uptake of 5G connectivity, with 81.0% of users subscribed. Yet, beneath this milestone, a digital divide remains, with lower adoption observed among rural populations and older age groups, often influenced by coverage limitation, affordability considerations and differing perceptions of need. Although 56.8% of users own 5G-enabled devices, only 47.4% of rural users do, despite half of all non-owners indicating intent to upgrade. Satisfaction with 5G sits at a modest level, with most users emphasising the need for wider and more consistent indoor coverage.

Hyperconnected Lives: The New Digital Routine

The digital behaviour of Internet users in Malaysia is becoming more immersive and habitual. Time spent online has increased, especially among younger users aged 15-24, who drive much of the country's content consumption and engagement trends. Their digital-first lifestyle, marked by online learning, social media and entertainment, accounts for over 25% who spend 5 to 8 hours online daily. Streaming platforms such as TikTok and YouTube dominate content use, reflecting both evolving consumer preferences and a shift toward visual and short-form content formats.

Cashless Momentum: Widespread, But Uneven

The transition to a cashless economy is another notable trend. With 75.6% of users adopting digital payment methods, QR codes, e-Wallet, and debit cards have become preferred tools, particularly Touch 'n Go e-Wallet, which commands an 86.3% usage rate. However, barriers such as security concerns, technology literacy, and connectivity gaps still hinder adoption in rural and elderly demographics. Government and private-sector initiatives, such as e-MADANI and Digital Campus 2.0, are proving effective but must continue scaling to close the inclusion gap.

Cybersecurity: A Rising Tide of Threats

Cybersecurity, however, emerges as a pressing concern. The number of users reporting cybercrime experiences rose to 44.4%, with fraud and scams topping the list. Emotional and financial consequences are widespread, including identity theft and a growing sense of online vulnerability. Encouragingly, users are more proactive, with 41.9% changed passwords, and nearly 29.9% reported incidents to the authorities, including Royal Malaysia Police (PDRM), MCMC and the National Scam Response Centre (NSRC). Nonetheless, public trust in digital environments remains fragile.

Child Online Safety: Strengthening Support in a Digital World

Children's exposure to the online world continues to deepen, with 60.7% now owning Internet-connected devices. Parental concerns are rising across multiple dimensions: age-inappropriate content, misinformation, cyberbullying, and now AI-manipulated content like deepfakes. Parental supervision has evolved toward dialogue, trust and digital literacy, rather than strict control, although the shift brings new challenges in staying ahead of emerging risks.

Misinformation & Trust: The Crisis of Verification

Public attitudes around content sharing are shifting toward both awareness-raising and entertainment, yet content verification practices are slipping. While 61.5% of users still share news, the percentage verifying validity and source reliability has dropped from 79.2% to 70.7%, with growing reliance on automated or platform-based fact-checking. Compounded by the rise of fake news, especially political and health misinformation, trust in online content is declining, even as usage increases.

CONCLUSION

The Internet Users Survey 2024 provides a comprehensive and timely reflection of Malaysia's digital evolution. As connectivity becomes deeply embedded in daily life, the findings highlight not only the country's accelerating digital adoption but also the complex risks, behavioural shifts, and structural gaps that must be addressed to ensure an inclusive and trusted digital future.

Digital adoption continues to rise across all segments of society, with more individuals using the Internet for communication, learning, entertainment, and economic participation. However, this momentum is accompanied by growing exposure to cyber threats, online harms, and unequal access to digital protections. From the surge in cybercrime incidents and the psychological impact of digital bullying to concerns around misinformation and gaps in parental control adoption, the survey underscores the need for holistic safeguards that extend beyond infrastructure alone.

Importantly, the data reveals that access now leads to behaviour, behaviour introduces risk, risk shapes public concern, and concern ultimately influences action. Each layer, whether observed in how children engage online, how parents respond to threats, or how users verify content that requires targeted and collaborative interventions.

In this context, MCMC plays a central enabling role. Flagship initiatives such as Klik Dengan Bijak, Sebenarnya.my, Malaysia ICT Volunteer (MIV), National Information Dissemination Centre (NADI) and Small Information Technology and Telecommunication Devices Recycling Project (KITAR) are critical touchpoints that not only raise awareness but also promote safe, responsible, and empowered digital participation. These programmes reflect MCMC's broader mandate to uphold digital trust, champion informed use, and ensure that no one is left behind.

As Malaysia advances its digital ambitions, IUS 2024 serves as both a compass and a catalyst. It calls on all stakeholders, such as government, industry, academia and the public to build a future where every individual in Malaysia can connect with confidence, participate meaningfully, and thrive securely in an increasingly complex digital environment.

KEY FINDINGS OF IUS 2024

81.0%
of internet users subscribe to a 5G service

1 out of 3
children have experienced a form of cybercrime:

- **10.8%** experienced online scam
- **9.3%** had their account hacked or stalked by someone
- **6.7%** received online threats

Purpose of sharing content online:

- **61.2%** to raise awareness
- **57.8%** to share beneficial contents
- **48.0%** for entertainment

75.6%
of internet users cashless transactions

Half of which do it at least once a day

Time spent on the Internet (daily):

- **20.5%** spend 9-12 hours
- **25.6%** spend 5-8 hours
- **21.5%** spend 1-4 hours

Top streaming apps downloaded:

NETFLIX	astro GO	Disney+
74.4% Netflix	**21.4%** Astro Go	**14.5%** Disney+

NATIONAL INFORMATION DISSEMINATION CENTRE (NADI)

The National Information Dissemination Centre (NADI) is an initiative implemented by MCMC under the Universal Service Provision (USP) programme, to ensure inclusive and widespread ICT access for communities across the country. Since its establishment in 2007, NADI has evolved significantly, taking on enhanced roles and implementing diverse initiatives in line with emerging technological advancements to support the needs of modern society.

ADVANCING NADI'S ROLE IN BRIDGING THE KNOWLEDGE AND SOCIOECONOMIC DIVIDE

The year 2024 marked a significant milestone for NADI with the implementation of various new initiatives, including the introduction of Smart Services, infrastructure enhancements, and expanded community outreach. These developments reflect the continued evolution of NADI's role, following its official rebranding as the National Information Dissemination Centre on 26 February 2024.

NADI plays a vital role in bridging digital, knowledge, and socioeconomic gaps across the country. Its primary focus is on underserved communities, including those in rural and remote areas, as well as low-cost housing in urban and suburban locations, ensuring equitable access to ICT services and related opportunities. Guided by three core objectives, NADI aims to provide collective internet access, empower local communities, and facilitate effective information dissemination.

To ensure inclusive ICT access and comprehensive service delivery, each NADI is designed to benefit communities within a 3 to 5 km radius. In line with this objective, the 1 DUN 1 NADI initiative was introduced to strengthen and expand NADI's presence, resulting in the development of 188 new centres and bringing the total to 1,099 nationwide.

As of 31 December 2024, 154 new NADI have been successfully established, increasing the number of operational centres to 1,065.

FUNCTION OF NADI

COLLECTIVE INTERNET ACCESS	COMMUNITY EMPOWERMENT	DISSEMINATING INFORMATION
Provide collective internet access to the local communities	Empowering the community by unlocking the full potential of the people by bridging socioeconomic gaps and changing lives for the better	Provide communities with accurate and essential information about government and private initiatives, benefits, programme and activities
NADI empowers communities thriugh the assimilation of technology into daily lives.	NADI fosters inclusivity, opportunities and diversity in the local communities.	NADI bridges information and knowledge gaps in local communities.

NADI LOCATION

NADI in Operation **1,065** | New NADI in Progress **34** | **1,099** NADI

State	Total NADI in operation	Total NADI in progress	Total NADI
Perlis	14	3	17
Kedah	77	4	81
Pulau Pinang	42	-	42
Perak	90	-	90
WP Kuala Lumpur	24	-	24
WP Putrajaya	4	-	4
Melaka	31	8	39
Kelantan	75	4	79
Terengganu	70	2	72
Pahang	113	1	114
Selangor	76	8	84
Negeri Sembilan	62	-	62
Johor	99	2	101
Sabah	130	2	132
WP Labuan	2	-	2
Sarawak	156	=	156

● Total NADI in operation ● Total NADI in progress ● Total NADI

***Note:** As of 31 December 2024*

The increase in the number of NADI reflects continued a commitment to supporting the government's efforts to bridge the digital divide, particularly in rural areas and underserved communities. Complementing this expansion, the NADI Smart Services programme was introduced to provide a more structured and high-impact approach to community empowerment.

NADI Smart Services was officially launched by the Prime Minister, YAB Dato' Seri Anwar Ibrahim, on 8 July 2024 at Kg. Dato' Ahmad Said. The initiative was developed following the Pusat Ekonomi Digital MADANI Conference, held on 29 November 2023, and is built upon five key pillars: Entrepreneurship, Lifelong Learning, Wellbeing, Awareness, and Government Initiatives.

The NADI Smart Services programme aims to empower communities by ensuring equitable access to opportunities that meet diverse local needs, while also enhancing community well-being and improving overall quality of life.

NADI SMART SERVICES

Launched on july 8, 2024, in Kampung Dato' Ahmad Said Tambahan 2, the NADI Smart Services initiative introduces five main pillars.

Five Key Pillars of NADI Smart Services

Following the rebranding as NADI and the implementation of the five key pillars under the NADI Smart Services programme, the number of NADI users has grown to 1.7 million as of 31 December 2024. Participation in NADI Smart Services programmes has also seen a significant increase, underscoring the growing demand for ICT facilities and skill development opportunities offered by NADI. A total of 224,872 participants have engaged in these programmes, reflecting the initiative's relevance and sustainability in advancing the government's aspirations for digital inclusion and community empowerment.

TOTAL NADI MEMBERSHIP 2024

NADI Membership
*1.08
JUTA

New Membership
(Julai - Disember 2024)*
+ **695,465

Total
1.7
JUTA

ACHIEVEMENTS 5 PILLARS OF NADI SMART SERVICES

ENTREPRENEURSHIP
104%
PARTICIPANT
3,644

LIFELONG LEARNING
156%
PARTICIPANT
54,671

WELLBEING
117%
PARTICIPANT
46,821

AWARENESS
107%
PARTICIPANT
107,450

GOVERNMENT INITIATIVES
8
PARTICIPANT
12,286

NATIONWIDE PARTICIPATION TOTAL

(1 SEPTEMBER - 31 DECEMBER 2024)

224,872

STRATEGIC ENGAGEMENTS & MILESTONES: NADI'S PARTICIPATION IN KEY EVENTS 2024

Throughout 2024, NADI actively participated in various high-profile events, reinforcing its role as a platform for community empowerment through the NADI Smart Services programme. One of the key engagements was its participation in the Mobile World Congress (MWC) 2024, held from 26 to 29 February in Barcelona.

At this international event, NADI showcased Malaysia's digital transformation efforts by presenting NADI Smart Services as a centre for collective internet access, digital training, and entrepreneurial support. This participation not only elevated NADI's visibility on the global stage, but also facilitated networking and future collaboration opportunities.

Another key event was the Generasi Ada Idea (GEN-AI) Carnival, held on 2 November in Penang. This event featured NADI Smart Services programmes, particularly under the Lifelong Learning pillar, with the Mobile Legends competition serving as an innovative learning platform for youth.

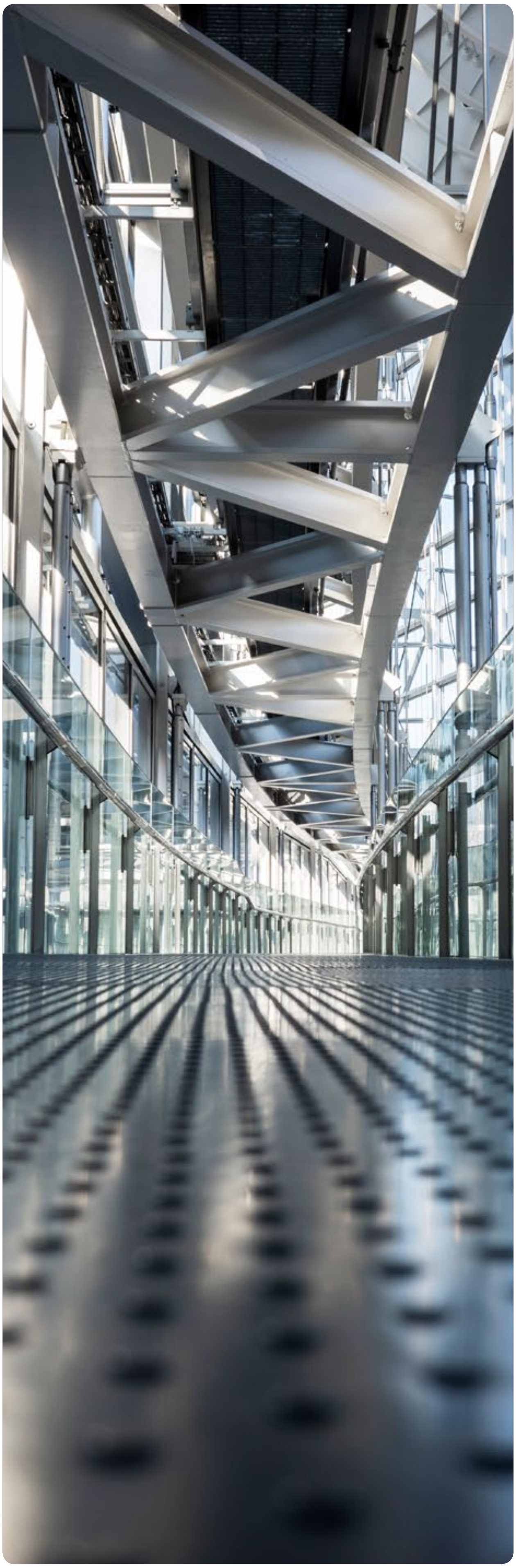
The carnival introduced the community to the concept that e-sports are not merely a form of entertainment, but also a platform that fosters strategic thinking, teamwork, problem-solving, and critical thinking among participants. It also provided young people with an opportunity to explore the growing e-sports industry, and pursue potential career pathways in digital technology and professional gaming.

Meanwhile, the Malaysia-China Summit 2024, held from 17 to 19 December, marked another significant milestone in NADI's efforts to promote local entrepreneurs. As part of the Ministry of Communications Pavilion, NADI showcased its community development initiatives through entrepreneurship programmes under NADI Smart Services.

The NADI Entrepreneurship Programme, which comprises four core modules, business planning, financial management, strategic digital marketing, and business operations, has successfully nurtured competitive entrepreneurs and enhanced their business capabilities.

Three entrepreneurs representing NADI participated in the exhibition, gaining valuable opportunities for knowledge exchange, industry experience sharing, and market exploration. Their presence also helped expand marketing networks to the global stage, further strengthening their visibility and growth potential.

Overall, NADI's involvement in these high-impact events throughout 2024 has significantly expanded its outreach and influence, strengthened strategic networks, and showcased its achievements in empowering communities through the NADI Smart Services initiative. These engagements have further reinforced NADI's role as a catalyst for connected community development and a trusted platform for information dissemination.



PUBLIC KEY INFRASTRUCTURE

The Public Key Infrastructure (PKI) serves as a foundational framework for digitally signing documents and transactions, ensuring both the authenticity of the sender's identity and the integrity of transmitted data. This system involves not only the management and distribution of public keys and digital certificates, but also includes a broader framework designed to safeguard Internet communications.

PKI encompasses a wide range of components, including software, regulatory measures, policies, and standards, that work together to enable secure online transactions. A key legislative milestone in Malaysia's ICT development was the enactment of the Digital Signature Act 1997 (DSA 1997), which came into force on 1 October 1998. This Act regulates the use of digital signatures through PKI, with the dual aim of strengthening the security of electronic transactions and providing a legal basis for validating digital signatures via certificates issued by licensed Certification Authorities.

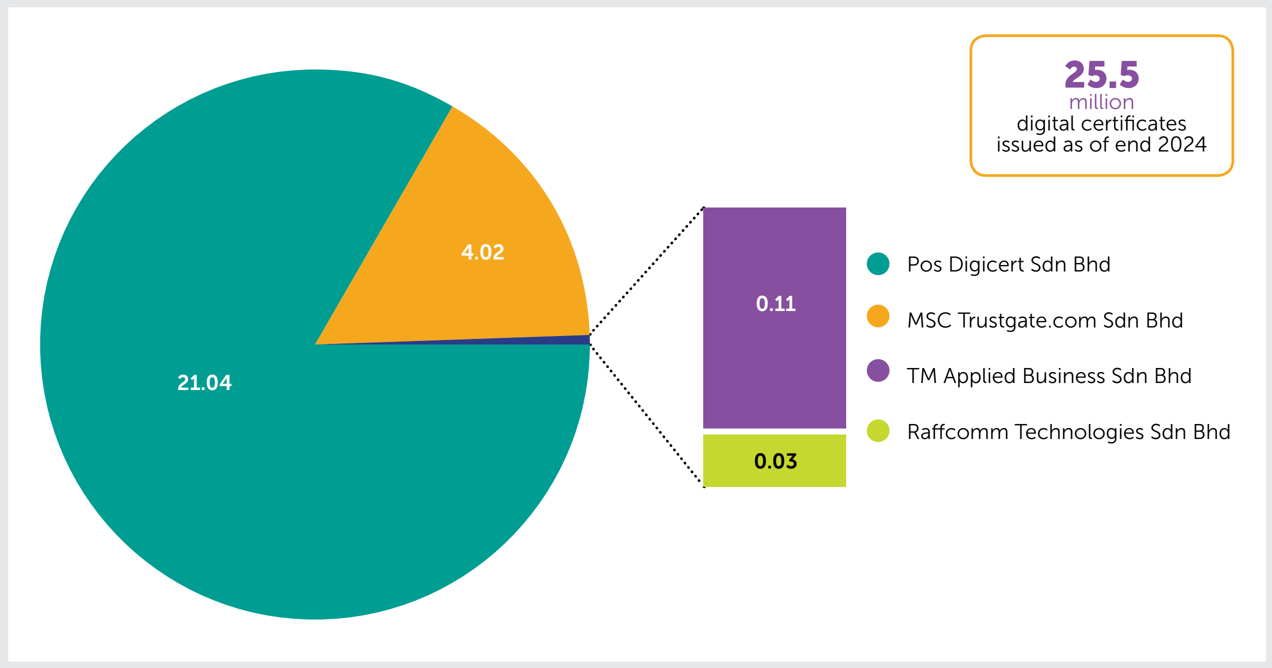
MCMC is responsible for the administration, enforcement, and oversight of the DSA 1997. This includes monitoring the activities of Certification Authorities to ensure compliance with regulatory standards and to maintain the integrity of online transactions within Malaysia's ICT ecosystem.

Currently, Malaysia has four licensed Certification Authorities: Pos Digicert Sdn Bhd, MSC Trustgate.com Sdn Bhd, Telekom Applied Business Sdn Bhd, and Raffcomm Technologies Sdn Bhd. These entities play a critical role in issuing digital certificates and ensuring the reliability and authenticity of digital signatures, thereby contributing to the resilience of Malaysia's digital infrastructure and fostering public trust in electronic transactions.

DIGITAL SIGNATURE DEVELOPMENT IN MALAYSIA

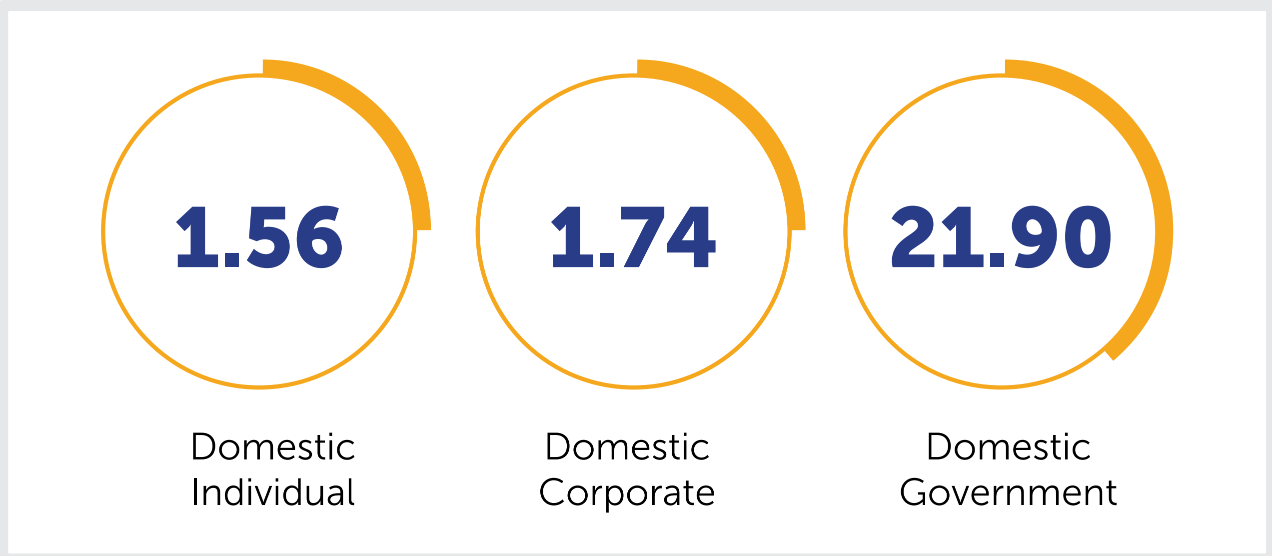
As the regulatory authority under the DSA 1997, MCMC is committed to fostering a secure and trusted digital ecosystem. Beyond its regulatory role, MCMC actively promotes awareness among stakeholders, including government agencies, the corporate sector, and individual users on the importance of adopting secure digital signatures.

The use of recognised digital signatures ensures confidentiality, identity authentication, and data integrity. This technology enhances security, prevents forgery, and supports the legal validity of digital transactions. It also contributes to cost efficiency by reducing paper usage, promoting green technology, and advancing environmental sustainability. MCMC targets full implementation of digital signatures in the public sector by 2025, in line with the government's MyDigital aspiration for a fully digital and secure administration.



Source: *MCMC*
Figure 5.4: *Digital Certificates Issued by Certificate Authorities (millions)*

As of the end of 2024, licensed Certification Authorities issued a total of 25.2 million digital certificates, an increase from 20.6 million in 2023. Pos Digicert Sdn Bhd emerged as the leading issuer, accounting for 21.04 million digital certificates, underscoring its pivotal role in enabling secure online transactions. MSC Trustgate.com Sdn Bhd and Telekom Applied Business Sdn Bhd issued 2.98 million and 0.104 million certificates, respectively.



Source: *MCMC*
Figure 5.5: *Types of Digital Certificates Issued in 2024*

The local government sector was the largest contributor to digital certificate adoption, accounting for 86.91% of all issuances in 2024. This highlights the crucial role of digital certificates in safeguarding online government services and ensuring the confidentiality and integrity of Internet-based communications. The remaining 13.09% was distributed to local individuals (6.20%) and corporations (6.90%), with no certificates issued to foreign corporations or governments, reflecting the domestic-centric nature of digital certificate usage in Malaysia.

The continued growth in certificate issuance demonstrates the increasing reliance on digital certificate services and the strength of Malaysia's PKI ecosystem. As digitalisation advances across society and business, demand for robust cryptographic solutions is expected to grow further, positioning Malaysia as a regional leader in digital security and authentication.

Chapter 6:

POSTAL & COURIER

This chapter reports the performance and growth of postal and courier sector along with technological solutions and sustainable initiatives deployed by service providers. The surge in e-commerce intensifies the growing demand for postal and courier services as Malaysia has surpassed the initial target of reaching 30 parcels per capita by 2025. Postal and courier service providers in Malaysia is governed by the Postal Services Act 2012, which was enacted to modernise the regulatory framework for these services, promote fair competition, uphold high service standards and ensure universal access throughout the nation. Further, MCMC remains committed in refining and expanding the *Pelan Accelerator Kurier Negara* (PAKEJ) initiatives amid the growing environmental concerns; PAKEJ+ was established in 2024 to reduce environmental impact while meeting rising delivery demand.

KEY HIGHLIGHTS 2024

POSTAL SERVICES

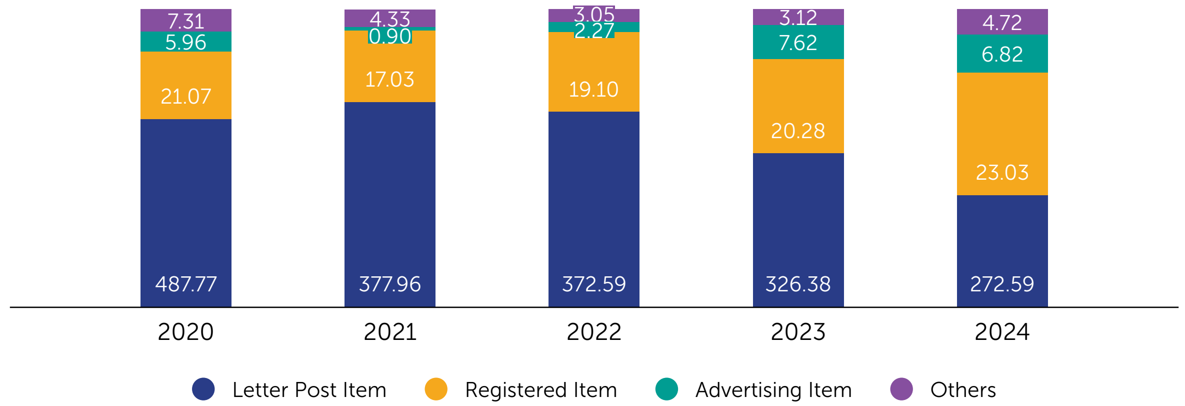
307.16 million

items managed in 2024 (2023: 357.41 million)

Top 3 items managed by Pos Malaysia in 2024:

Letter post items	Registered items	Advertising items
88.75%	**7.50%**	**2.22%**

Postal Traffic Distribution by Category 2020–2024 (million)



* *Others include express item, post free item, ordinary parcel and insured parcel.*

Source: *Pos Malaysia Berhad*

COURIER SERVICES

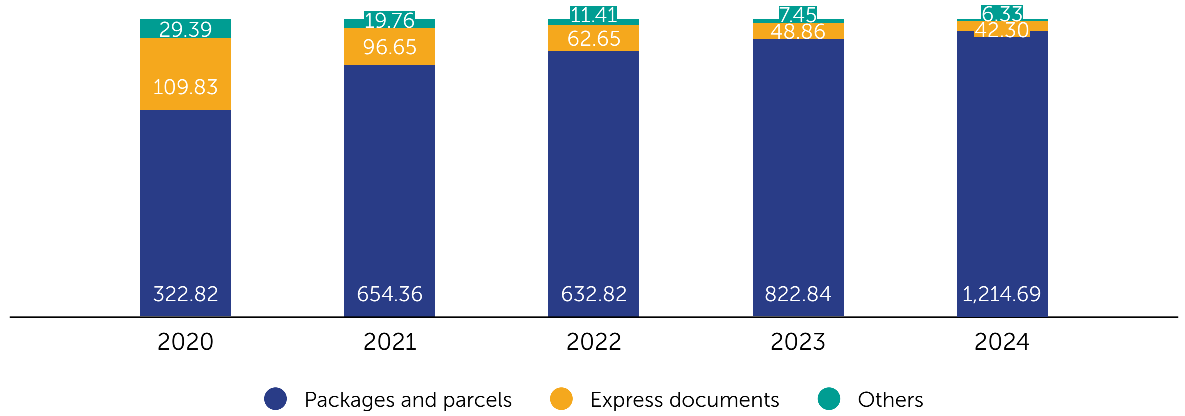
1.26 billion

items managed by courier licensees in 2024 (2023: 879.15 million)

Percentage of courier traffic in 2024:

Packages and parcels	Express Documents	Others
96.15%	**3.35%**	**0.50%**

Courier Traffic Distribution by Category 2020-2024 (million)

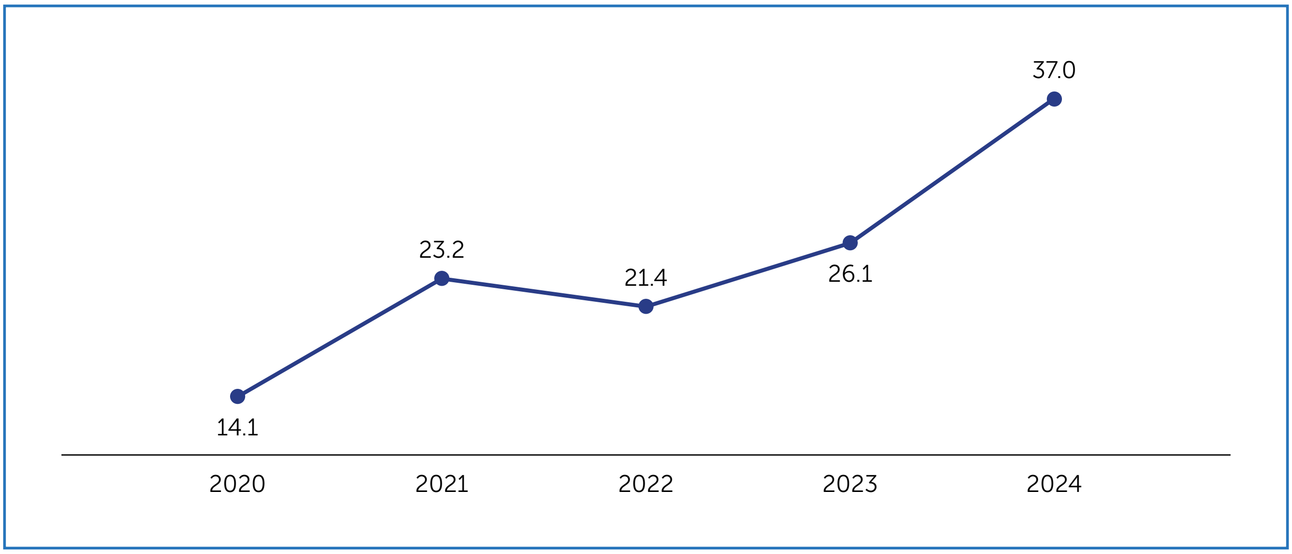


* *Others include non-priority mail, walk-in courier, prepaid, post express, etc.*

Source: *MCMC*

PARCEL PER CAPITA

Malaysia recorded 37.0 parcels per capita in 2024,
exceeding the initial target of achieving **30 parcels per capita by 2025**
(41.76% increase from 2023)



Source: *MCMC*

POSTAL SERVICES

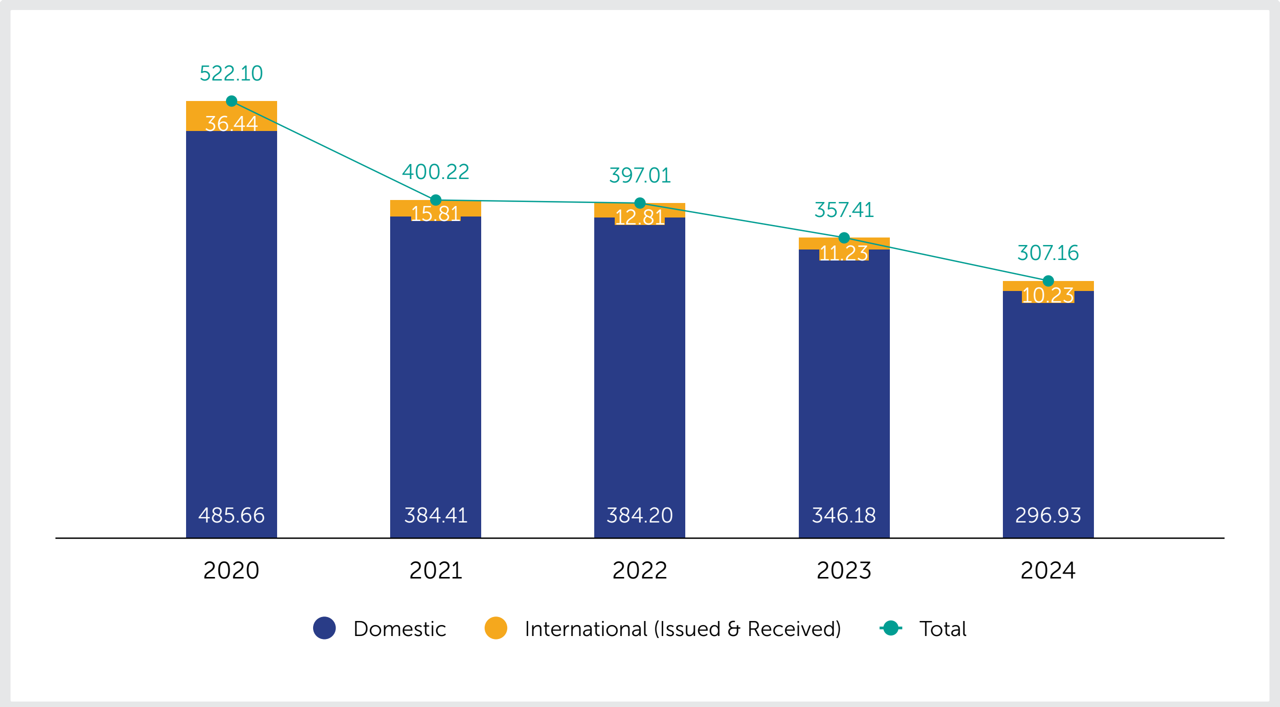
The year 2024 marks the 150th anniversary of the Universal Postal Union (UPU)'s establishment which plays a pivotal role in facilitating continuous communication and connecting people across nations. Malaysia became a member of UPU on 17 January 1958 and has since maintained a strong commitment to fostering global connectivity and supporting the development of efficient postal services.

Pos Malaysia Berhad (Pos Malaysia), the sole universal service provider in Malaysia, plays a central role in enhancing both domestic and international mail exchanges while promoting postal innovation nationwide. With a legacy spanning over two centuries, Pos Malaysia has evolved from a traditional postal operator into a comprehensive provider of mail and parcel solutions, financial services and supply chain management. It now operates the most extensive delivery network in Malaysia that also serves as a vital infrastructure, supporting economic growth, facilitating trade, and connects communities.

POSTAL TRAFFIC

The total volume of postal traffic declined by 14.06%, with Pos Malaysia handling a total of 307.16 million items in 2024 compared to the previous year. The global shift towards online communications, online transactions, remote working and the growing environmental concern has impacted the volume of postal traffic managed by the sector.

OVERALL POSTAL TRAFFIC 2020-2024 (MILLION)



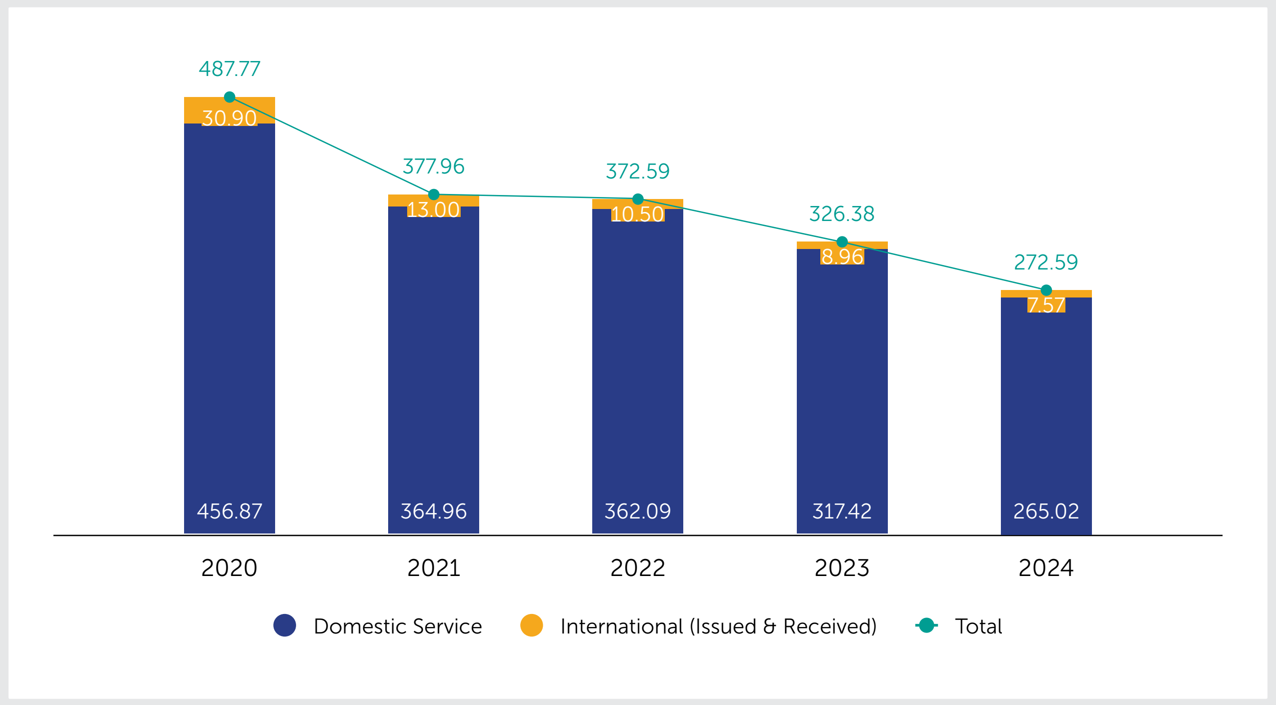
Source: *Pos Malaysia Berhad*
Figure 6.1: *Overall Postal Traffic 2020-2024 (million)*

In 2024, Pos Malaysia handled a diverse range of postal items, with majority being letter post items accounting for the majority at 88.75% of the total volume. Registered items followed as the second largest category, making up 7.50% of the total, while advertising items constituted 2.22%. These three categories represented the highest volume of postal items managed by Pos Malaysia in 2024.

Letter Post Item

A total of 272.59 million letter post items managed in 2024 contributed to 88.75% of the overall postal traffic. This category remained the highest in volume for Pos Malaysia despite the significant reduction from 326.38 million in 2023. The continuous decrement is mainly attributed to the widespread adoption of technology in telecommunications that has shifted the reliance from traditional letters to online communication platforms. Nevertheless, this service remains relevant and essential for official and legal correspondence, as well as for consumers who prefer a more economical delivery option.

LETTER POST ITEMS 2020-2024 (MILLION)

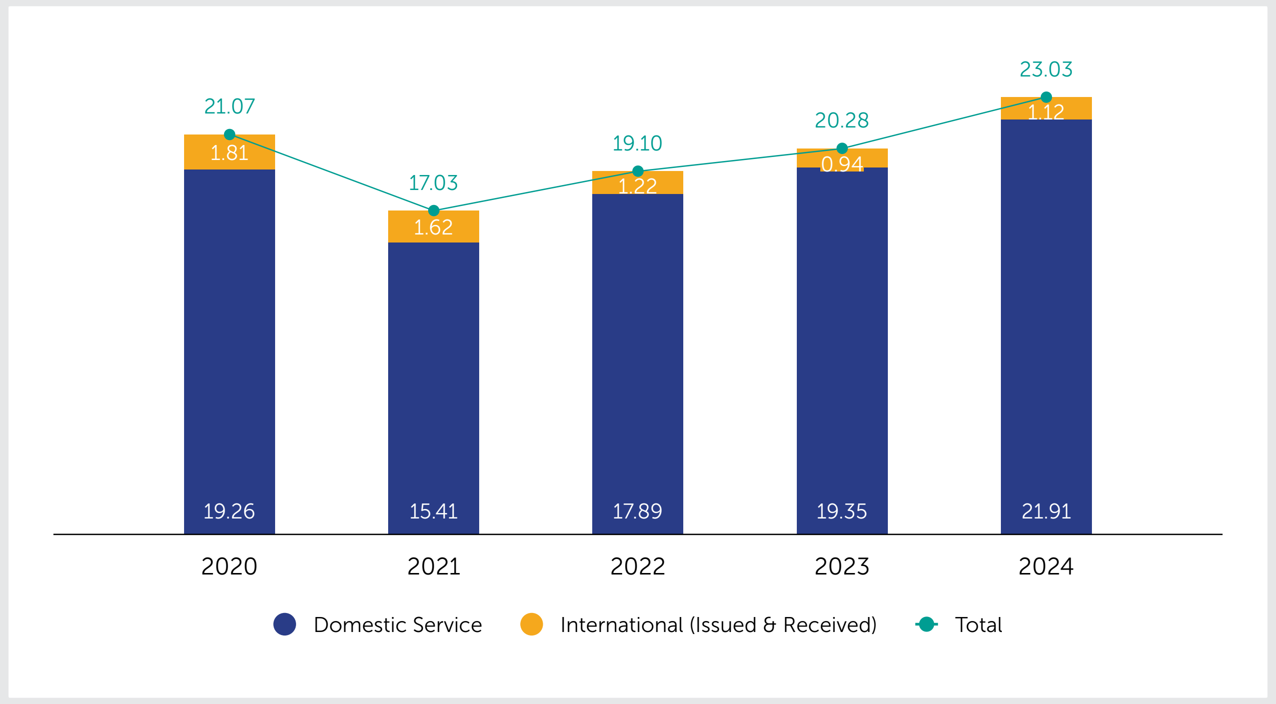


Source: *Pos Malaysia Berhad*
Figure 6.2: *Letter Post Items 2020-2024 (million)*

Registered Item

After experiencing a shortfall in 2021, the total volume of registered items increased at an average yearly increment of 10.62% from 2021 to 2024, reaching 23.03 million items in 2024. This volume exceeded the total recorded in 2020 and the steady growth indicates rising demand for this category. Both domestic and international registered items increased from 2023 to 2024 by 13.25% and 19.45%, respectively. The additional services offered with this type of delivery such as online tracking, proof of delivery and insurance coverage continue to attract consumers who seek a secure and timely option for sending high-value items.

REGISTERED ITEMS 2020-2024 (MILLION)

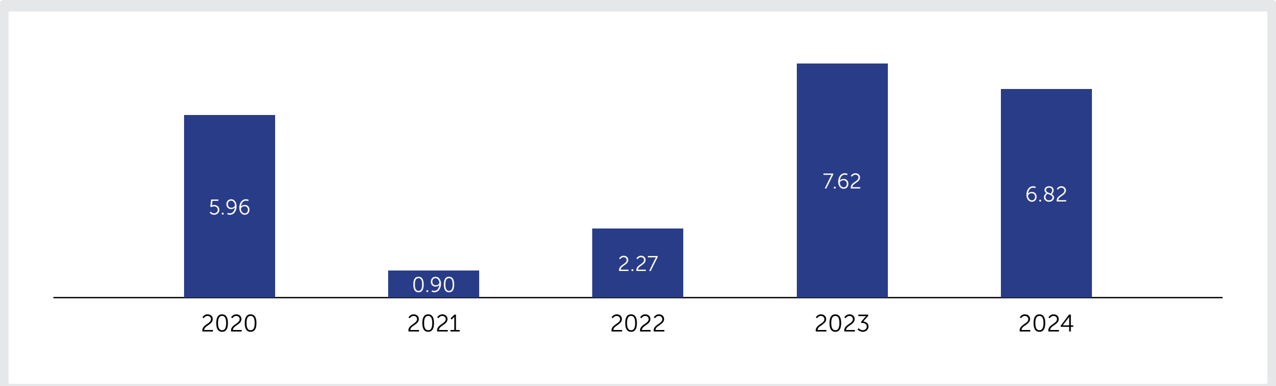


Source: *Pos Malaysia Berhad*
Figure 6.3: *Registered Items 2020-2024 (million)*

Advertising Item

Pos Malaysia offers a diverse range of mass marketing solutions for local businesses including direct mail, admail or maildrop, promotional booth, vehicle advertising and PosTV. Between 2020 and 2024, a notable increase in advertising items was recorded in 2022 and 2023, illustrating a rising interest in mass marketing strategies. Although the category experienced a decline of 10.57% to 6.82 million items in 2024, the service remained a crucial driver of brand visibility and consumer engagement, continuing to influence purchasing behaviour and shape broader industry trends.

ADVERTISING ITEMS 2020-2024 (MILLION)

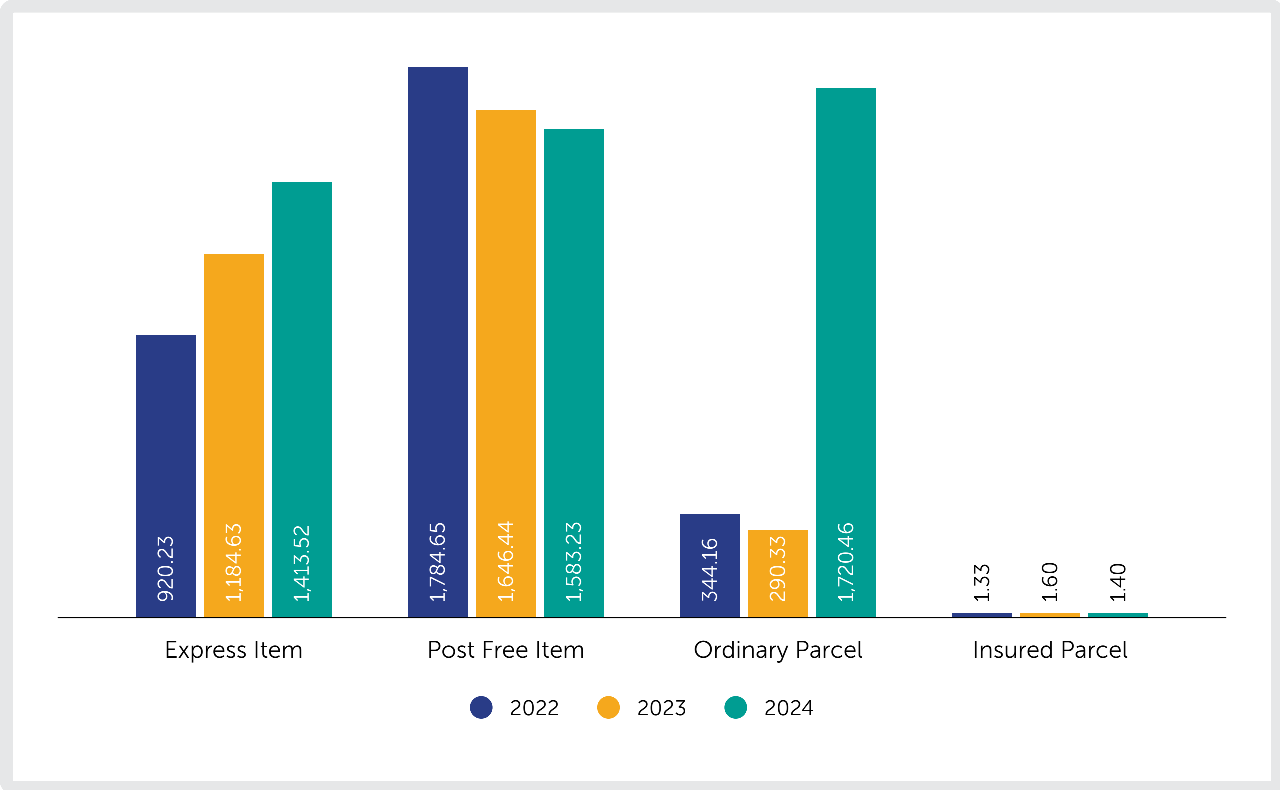


Source: *Pos Malaysia Berhad*
Figure 6.4: *Advertising Items 2020-2024 (million)*

Others

Other categories, which include express item, post free item, ordinary parcel and insured parcel, accumulated to the total of 4.72 million items managed by Pos Malaysia in 2024. While each of these categories made up a smaller proportion of the overall postal volume, their combined contribution continued to play a role in Pos Malaysia's operations.

OTHERS 2022-2024 ('000)



Source: *Pos Malaysia Berhad*
Figure 6.5: *Others 2022-2024 ('000)*

Ordinary parcels had a sudden surge in 2024, making up to the total of 1.72 million parcels managed by Pos Malaysia, comprising 127,444 internationally issued and received parcels, along with the addition of 1.59 million parcels managed domestically. The sharp increase from 2023 was primarily driven by the appointment of Pos Malaysia as Shopee's last-mile delivery partner to manage the high volume of Mel Plus products. The substantial volume of 1.49 million Mel Plus products contributed to 86.63% of the overall ordinary parcels handled by Pos Malaysia in 2024. Mel Plus offers an economical delivery option tailored for non-time sensitive deliveries and focused on light and small items below 2kg.

Further, the traffic for express items increased by 19.32%, from 1.18 million in 2023 to 1.41 million in 2024. Since 2023, Pos Malaysia exclusively offered international services in this category, following a service optimisation strategy that discontinued the domestic Pos Ekspres and integrated it into the Pos Laju courier service portfolio. Subsequently, demand for international express services continues to grow at an average annual increase of 24.15% from 2022 to 2024, indicating the expanding interest and trust in accelerated cross-border delivery. Pos Malaysia maintains its role in supporting both outbound and inbound delivery by managing 1.17 million items issued and 241,338 international express items received in 2024.

Other than that, post free items and insured parcel slightly declined from 2023 to 2024 by 3.84% and 12.34%, respectively. Despite the slight decrease in post free items, the total of 1.58 million items managed by Pos Malaysia in 2024 reflects the ongoing relevance of this service in addressing local delivery needs. For example, Pos Malaysia provides the Mel Rakyat service for non-commercial letter delivery across Malaysia to encourage the community to send handwritten letters filled with their messages or doodles to anyone within the country. Moreover, insured parcels were reduced from 1,597 in 2023 to 1,400 in 2024. While modest in volume, this service remains a key contributor to fulfilling the demand for secure and timely deliveries, especially during festive seasons when reliability is paramount for customers.

Despite fluctuations over the years, these categories continue to be an integral part of Pos Malaysia's services, catering to various market segments across the nation. Their collective contribution highlights the organisation's adaptability in responding to evolving customer preferences while maintaining operational efficiency. Altogether, these categories increased significantly by 51.09% from 3.12 million in 2023 to 4.72 million in 2024, reinforcing Pos Malaysia's role in supporting the broader logistics and communication network throughout the country.

6

POSTAL SERVICES ACCESSIBILITY

The overall postal infrastructure was reduced from 1,471 facilities in 2023 to 1,213 in 2024. While most infrastructure components remained unchanged since 2023, the overall 17.54% reduction was mainly attributed by the decrease in the number of stamp vendors and postal agents.

POSTAL INFRASTRUCTURES IN 2024

Post Offices	627
Mobile Post Offices	9
Mini Post Offices	230
International Offices of Exchange	1
Postal Agents	207
Sorting Offices	8
Stamp Vendors	131

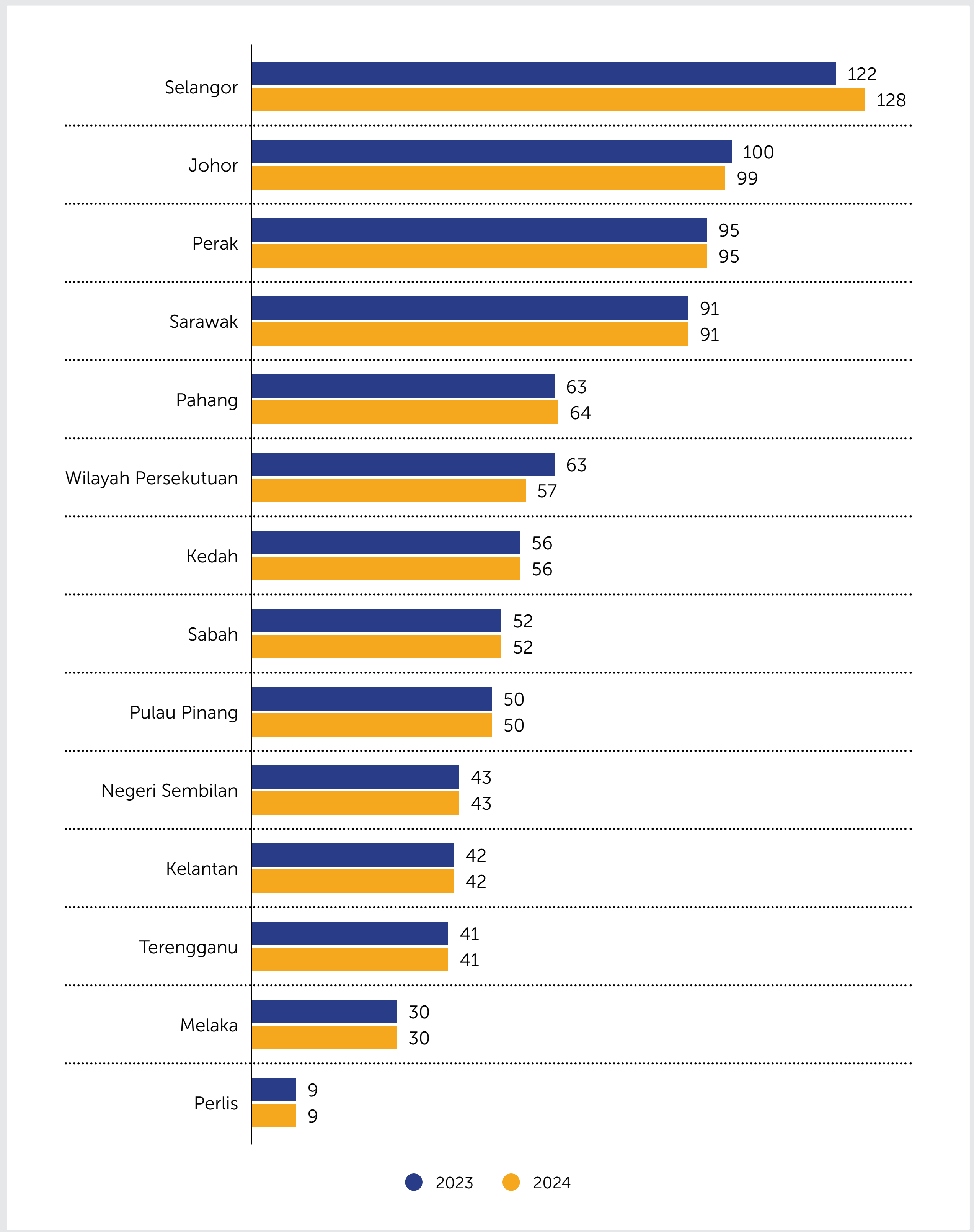
Source: *Pos Malaysia Berhad*
Figure 6.6: *Postal Infrastructures in 2024*

Postal agents were slightly reduced from 215 in 2023 to 207 in 2024. This adjustment aimed to ensure the optimal allocation of 207 agents to receive and distribute mail on behalf of Pos Malaysia, particularly within rural communities. These agents serve as key intermediaries in facilitating last-mile delivery.

In contrast, the number of stamp vendors dropped significantly to 131 in 2024 from 381 in 2023, primarily due to the decreasing reliance on stamps for mailing purposes. As more consumers adopt alternative postage options such as online postage and prepaid envelopes, the sole reliance to physical stamps has declined. Stamp vendors, who are authorised third-party individuals or businesses selling postage stamps on behalf of Pos Malaysia, were therefore reprioritised in favour of enhancing other postal infrastructure.

The total number of post offices and mini post offices in 2024 remained at 857, with 61.84% located in urban areas while the remaining 38.16% were in rural areas. Further, Figure 6.7 provides an overview of post office distribution by state in 2024 where Selangor, Johor and Perak remained as the top three states with the highest post offices (including mini post offices) at 128, 99 and 95 offices, respectively.

POST OFFICES BY STATES 2023-2024



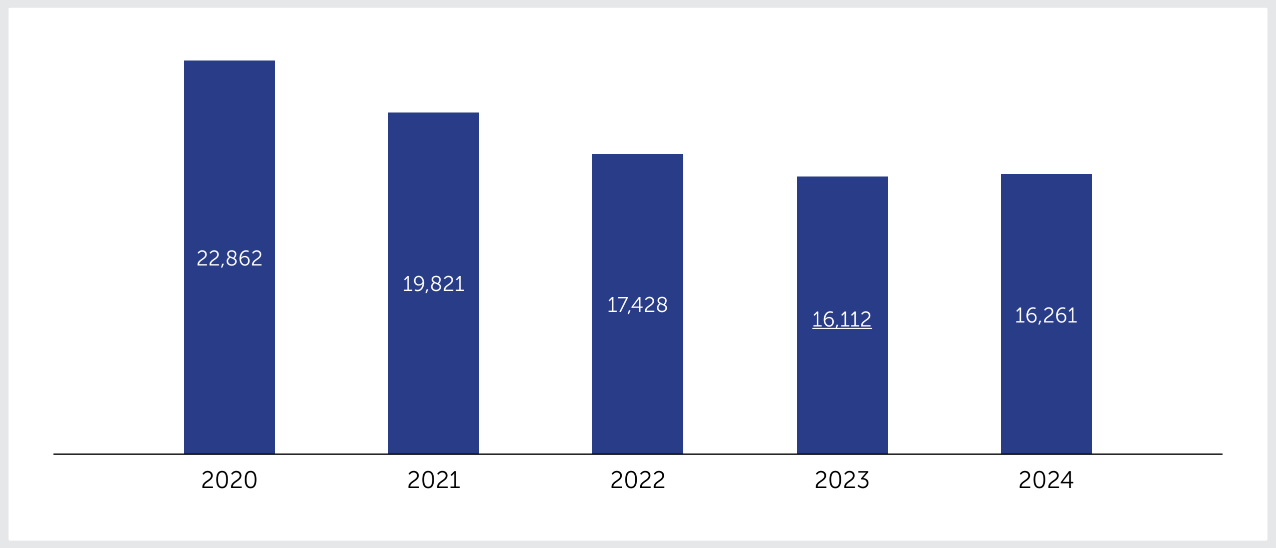
Source: *Pos Malaysia Berhad*
Figure 6.7: *Post Offices by States 2023-2024*

These post offices continued to play a vital role not only in delivering core postal services but also in delivering a range of essential public services such as utility bill payments, driving licence renewals and other essential transactions. Beyond their traditional functions, the broad postal network remains an important enabler of economic activity, social interaction and connectivity across urban and rural areas.

POSTAL EMPLOYMENT

Postal employment increased by 0.92%, rising from 16,112 employees in 2023 to 16,261 in 2024. This marks a positive shift following several consecutive years of decline, reflecting ongoing efforts to enhance service delivery capacity and operational efficiency within the postal sector.

POSTAL EMPLOYMENT 2020-2024

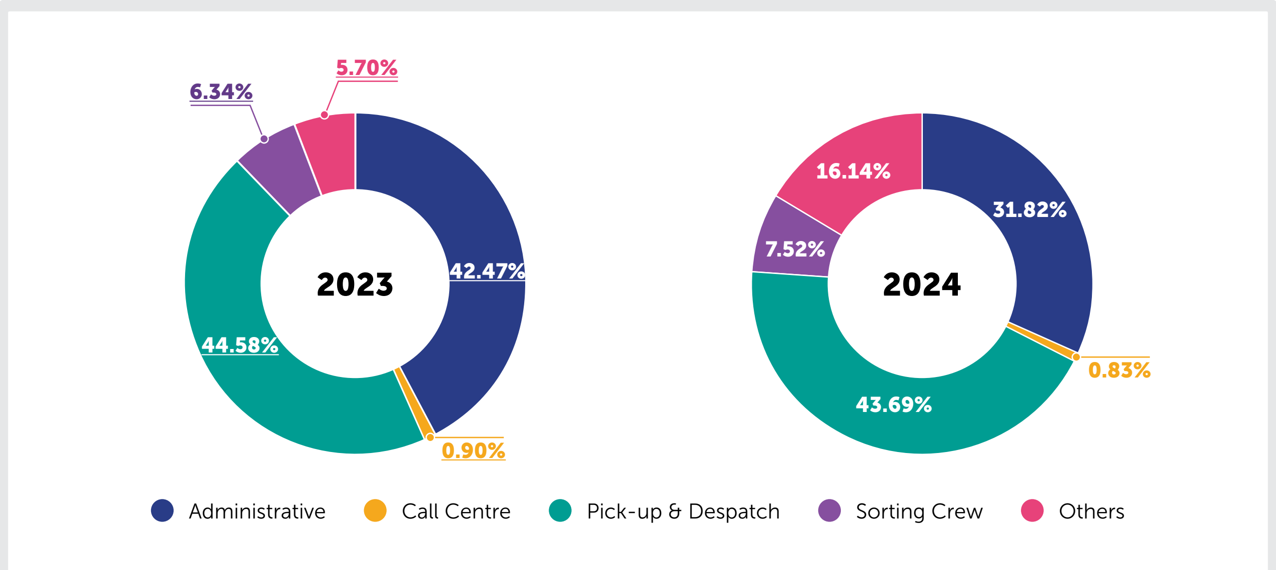


Source: *Pos Malaysia Berhad*
Figure 6.8: *Postal Employment 2020-2024*

Pos Malaysia's employment is categorised into five main groups: administrative, call centre, pick-up and despatch, sorting crew, and others. In 2024, Pos Malaysia had a substantial realignment of the overall staff in other category including supervisor of postmen and *wakil posmen*. This resulted in the significant increase of the overall postal employees as this category alone contributed to the addition of 1,706 employees, portraying the growth of this category from 919 employees in 2023 to 2,625 in 2024.

In addition, the number of sorting crews increased by 201, summing up to 1,223 crews working under this category in 2024. These workforce adjustments illustrate Pos Malaysia's commitment to strengthening its mail and parcel processing capabilities to improve overall delivery performance.

POSTAL EMPLOYMENT BY CATEGORY 2023-2024



Source: *Pos Malaysia Berhad*
Figure 6.9: *Postal Employment by Category 2023-2024*

HARI POS SEDUNIA

Hari Pos Sedunia, also known as World Post Day, was commemorated in Malaysia with a series of nationwide events and initiatives aimed at highlighting the evolving role of postal services in a modern and connected society. Celebrated annually on 9 October, the event marks the founding of the Universal Postal Union (UPU) and serves as a platform to recognise the vital contributions of postal services to both global and national development.

In 2024, the celebration was held under the theme "Innovating for Inclusion and Connectivity," reflecting the postal sector's commitment to embracing innovation while expanding access to services across all communities, particularly underserved and rural areas.

The event featured exhibitions, public awareness campaigns and community outreach programmes organised by Pos Malaysia and related stakeholders. The "Pos Malaysia World" campaign page is an interactive 3D experience that showcases Pos Malaysia's diverse services beyond traditional postal functions. Users could explore a gamified environment and engage with interactive elements to learn more about logistics, aviation, retail and other technological solutions.

POS MALAYSIA WORLD

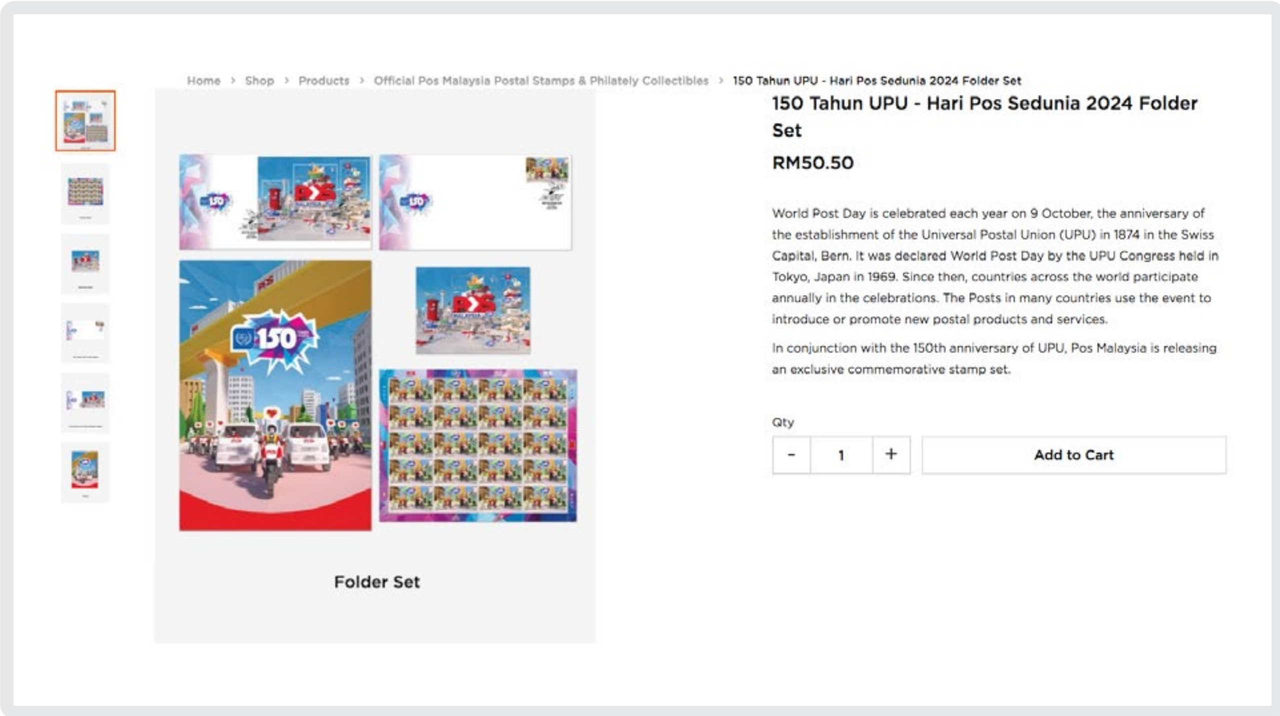
Watch the short film on Pos Malaysia's World campaign page at https://www.pos.com.my/world-of-posmalaysia.

Source: *Pos Malaysia Berhad*

In addition, a short documentary video titled "Pos Malaysia Transformation Story: Delivering Connections, Improving Lives," was released, offering a historical overview of Pos Malaysia's transformation over two centuries and emphasises its commitment to connect the communities.

To further commemorate World Post Day 2024, Pos Malaysia also issued an exclusive commemorative stamp set. The folder set is available at all Pos Malaysia's Philatelic Bureaus, including 13 General Post Offices nationwide, and online at https://shop.pos.com.my/150-tahun-upu-hari-pos-sedunia-2024-folder-set.html, while stocks last.

HARI POS SEDUNIA 2024 FOLDER SET



Source: *Pos Malaysia Berhad*

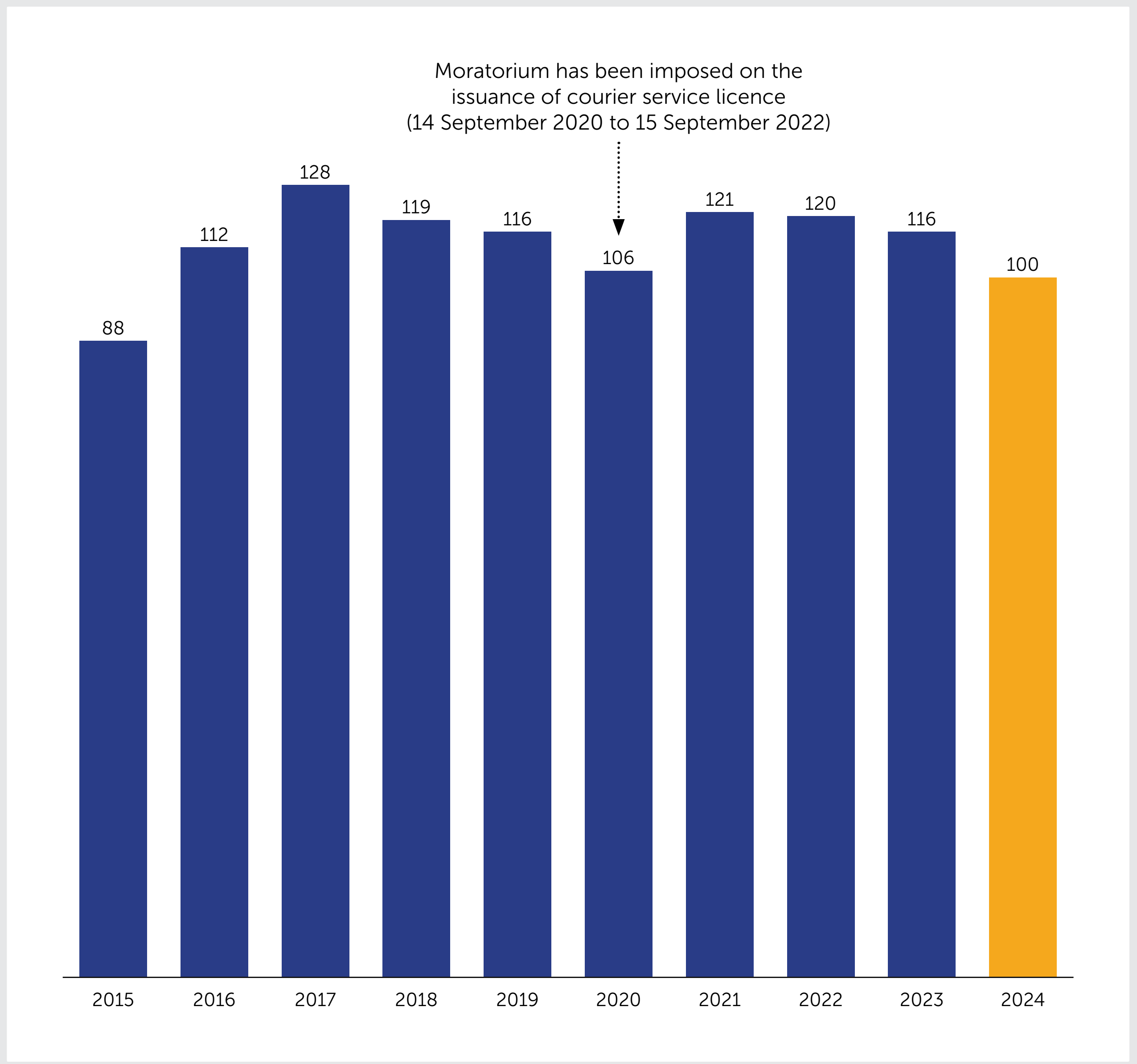
COURIER SERVICES

Courier services play a crucial role in today's fast-paced economy by providing reliable and efficient delivery solutions for businesses and communities. These services are designed to transport packages, documents and other items with speed and precision, ensuring timely and secure delivery. Courier companies offer a range of customisable options including same-day delivery, express shipping and real-time tracking to cater for the diverse needs of consumers.

COURIER LICENSING PROFILE

The market saturation in courier licensing profiles experienced notable fluctuations over the years as courier service providers reacted to the changes in consumer behaviour and proliferation of e-commerce expansion. The number of courier licences increased substantially in 2017 and began to decline slightly after 2017 suggesting that the market was reaching saturation. In response to intensified competition in the overcrowded market, a two-year moratorium on new licence was imposed in 2020 to help regulate the sector and enhance the quality of delivery services.

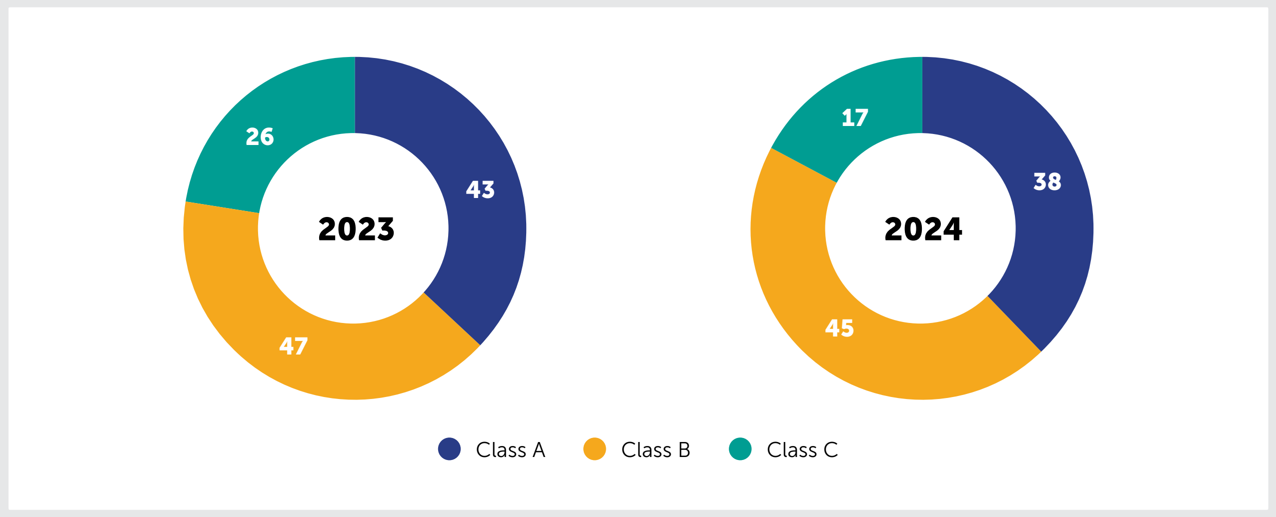
TOTAL NUMBER OF COURIER LICENCES 2015-2024



Source: *MCMC*
Figure 6.10: *Total Number of Courier Licences 2015-2024*

As the moratorium was lifted in 2022, the number of issued licences declined to 116 in 2023 and narrowed further to 100 in 2024. This reduction resulted from the enhanced regulatory framework for courier licence issuance, aimed at moderating competition and enabling sustainable growth of existing industry players.

COURIER LICENSEES BY CATEGORY 2023-2024



Source: *MCMC*
Figure 6.11: *Courier Licensees by Category 2023-2024*

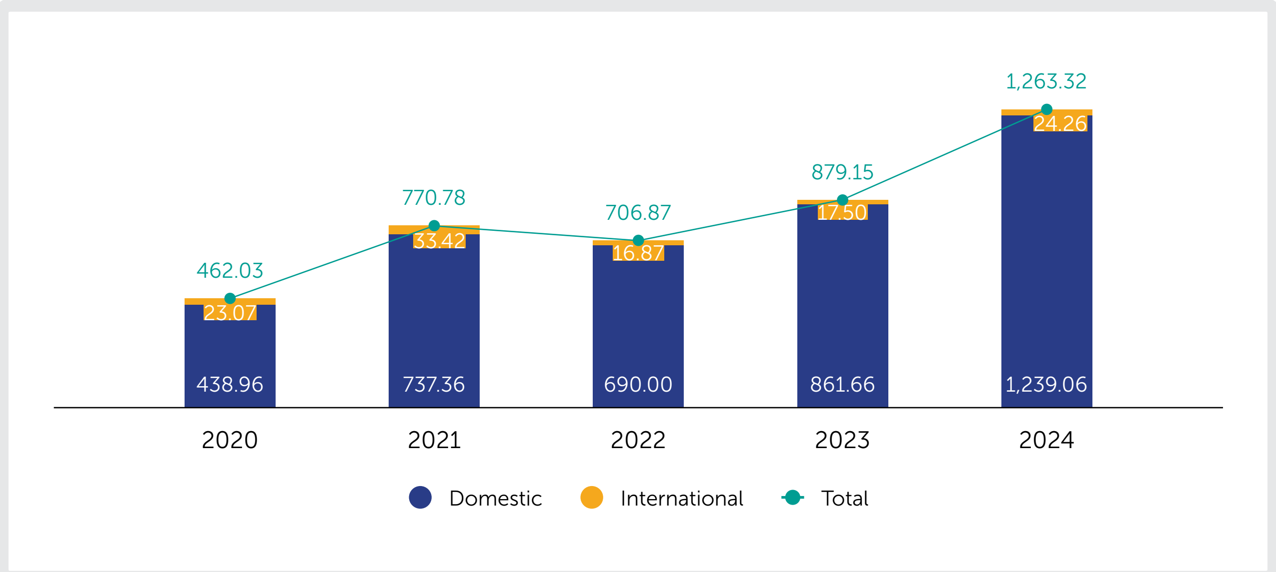
Figure 6.11 illustrates the evolving structure of the courier sector, with a more balanced distribution of licensees across categories from 2023 to 2024. In 2024, Class B remained relatively stable since 2023, suggesting resilience among medium-sized and larger courier businesses. Class B had the largest number of licensees with 45 service providers specialising in domestic and international inbound services, followed by Class A with 38 couriers offering both domestic as well as international inbound and outbound services. Meanwhile, the remaining 17 courier licensees were in Class C, providing domestic services limited to only one state.

COURIER TRAFFIC

The overall courier traffic grew significantly from 462.03 million in 2020 to 1.26 billion in 2024 nearly tripling over five years. Domestic deliveries dominated the market rising from 438.96 million in 2020 to 1,239.06 million in 2024, with consistent year-over-year growth except for a slight fall in 2022.

In contrast, international courier traffic fluctuated, peaking at 33.42 million in 2021, then declined sharply to 16.87 million in 2022 before gradually recovering to 24.26 million in 2024. This volatility suggests external influences such as global supply chain disruptions and broader economic conditions affecting cross-border shipments.

OVERALL COURIER TRAFFIC 2020-2024 (MILLION)



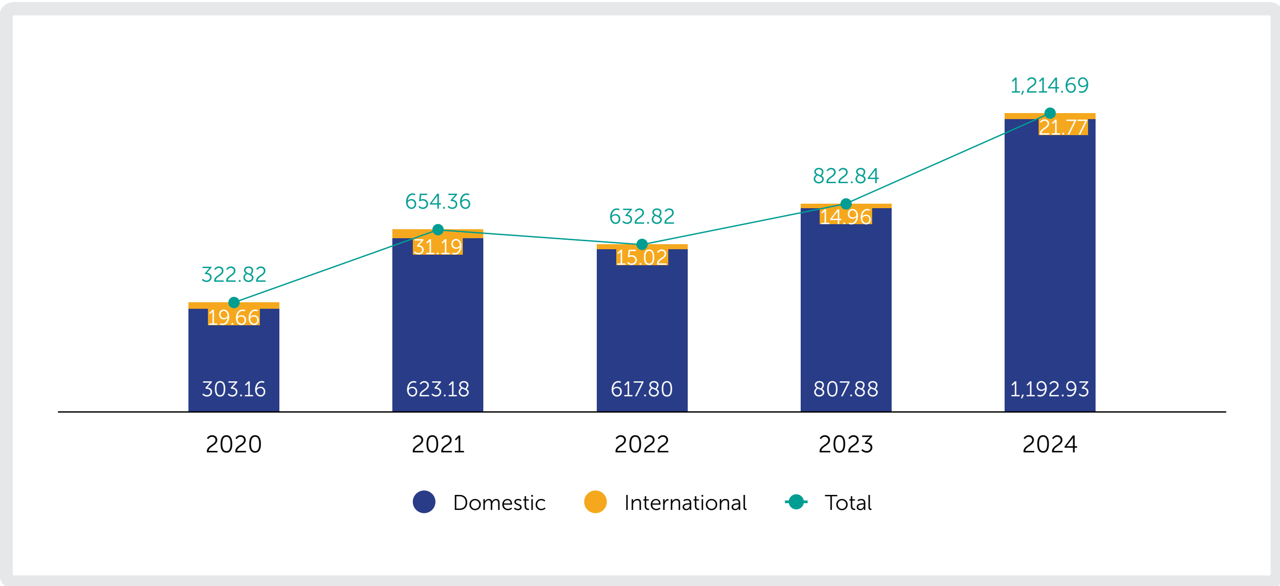
Source: *MCMC*
Figure 6.12: *Overall Courier Traffic 2020-2024 (million)*

Courier traffic consists of packages and parcel, express documents and other category including non-priority mail, walk-in courier services, prepaid options, as well as post express. The notable 43.70% surge in overall courier traffic from 879.15 million in 2023 to 1.26 billion in 2024 was primarily driven by e-commerce boom, which fuelled the rising demand for package and parcel deliveries in online retail space.

Packages and parcels

The total packages and parcels managed in 2024 increased significantly from 822.84 million in 2023 to 1.21 billion in 2024. This 47.62% surge in 2024 marked the strongest growth in the five-year period, reflecting increasing consumer reliance on prompt delivery services.

PACKAGES AND PARCELS 2020-2024 (MILLION)



Source: *MCMC*
Figure 6.13: *Packages and Parcels 2020-2024 (million)*

Based on questionnaire responses from 28 courier companies, the top five commonly delivered e-commerce items in 2024 were led by electronic devices which accounted for 32.14% of responses. This was followed by clothing and apparel (25.00%), healthcare products (17.86%), food and beverages (14.29%), and beauty products (10.71%). This distribution highlights the dominance of electronics and fashion in online retail, while also signalling the growing penetration of e-commerce into essential categories like healthcare and groceries. The demand for faster and more efficient last-mile delivery solutions continues to intensify as consumers increasingly prioritise convenience and accessibility.

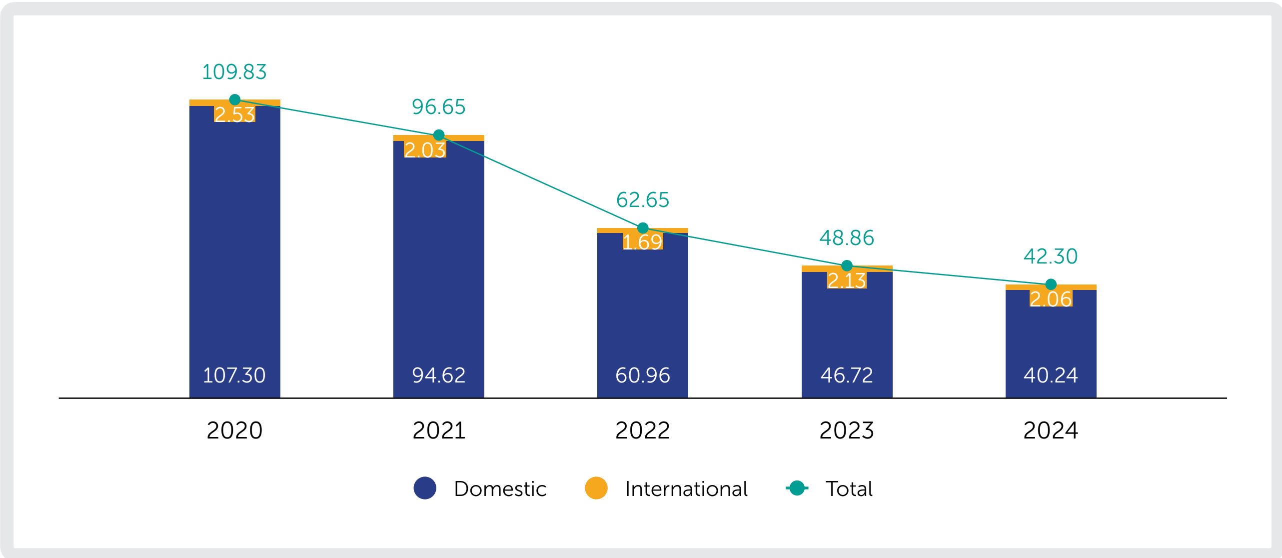
6

Express Documents

Conversely, the volume of express documents experienced a steady decline from 109.83 million in 2020 to 42.30 million in 2024. The downward trend was driven by a sharp reduction in domestic document deliveries, which fell by more than half from 107.30 million in 2020 to 40.24 million in 2024, while international volumes remained relatively low reaching 2.06 million in 2024.

This decline can be attributed to the widespread adoption of online communications and the shifted reliance on physical documents towards electronic transactions in both corporate and personal sectors. Nevertheless, niche demand for critical document deliveries remains, as reflected in the stabilisation of international volumes.

EXPRESS DOCUMENTS 2020-2024 (MILLION)

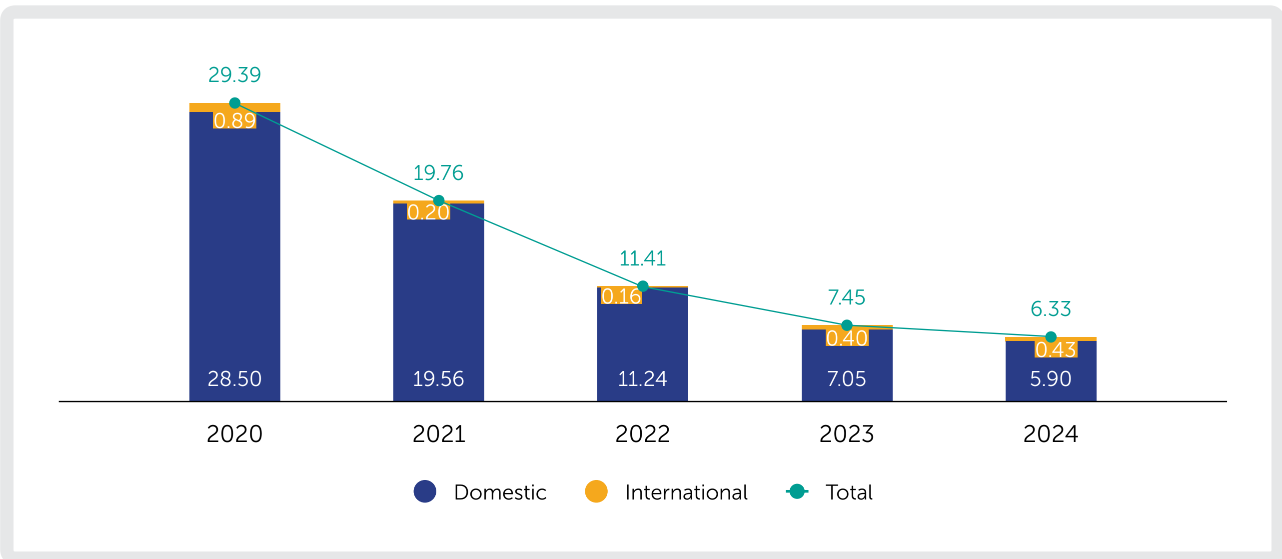


Source: MCMC
Figure 6.14: Express Documents 2020-2024 (million)

Others

Other courier traffic which includes non-priority mail, walk-in courier, prepaid and post express services declined further from 29.39 million in 2020 to 6.33 million in 2024. The most substantial decline occurred between 2020 and 2021, with a 32.75% reduction.

OTHERS 2020-2024 (MILLION)



Source: MCMC
Figure 6.15: Others 2020-2024 (million)

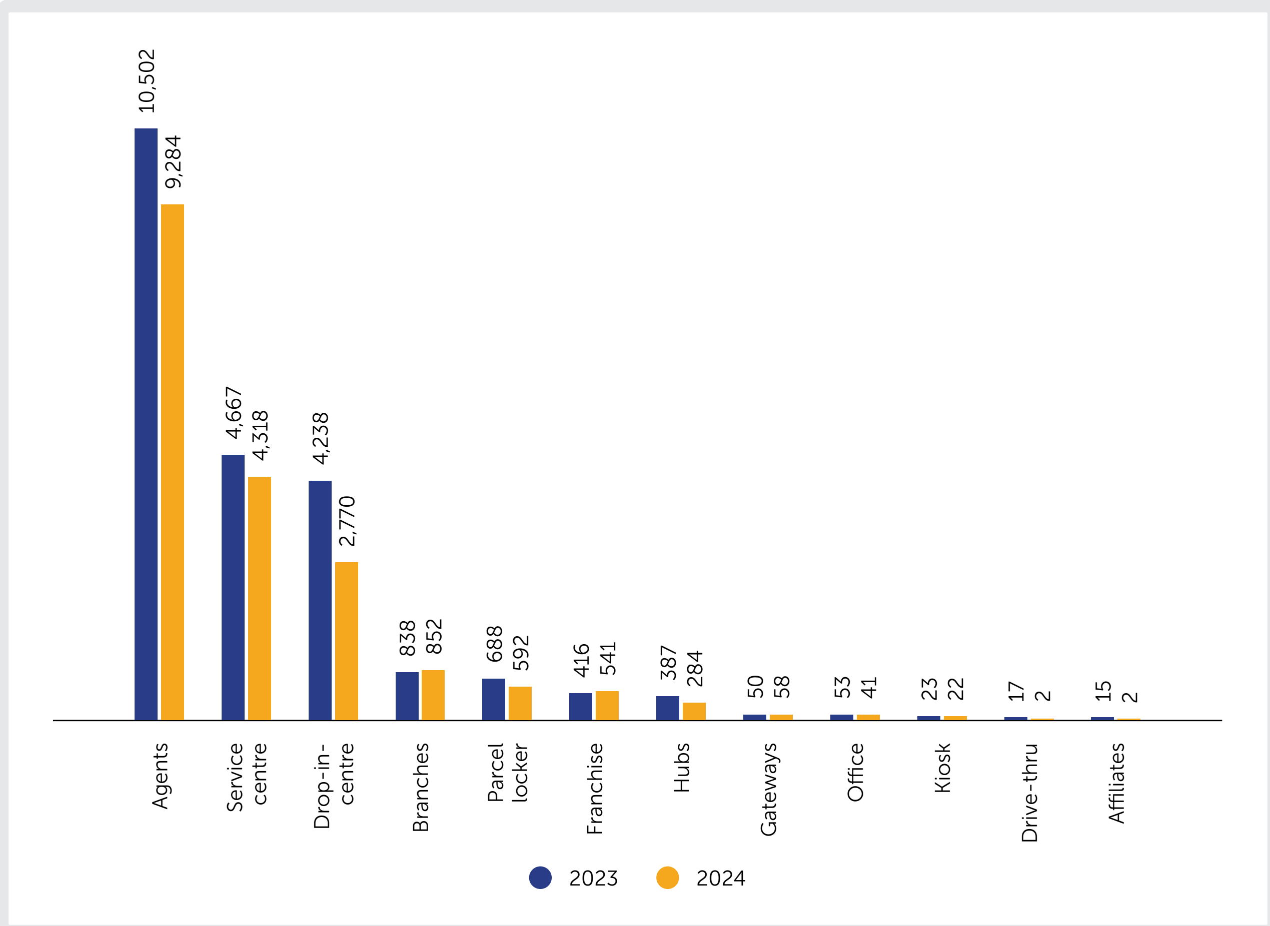
Domestic traffic, which made up the majority of this category fell from 28.50 million in 2020 to 5.90 million in 2024, while international traffic decreased from 0.89 million to 0.43 million over the same period. This downward trend can be attributed to the change in consumers' preference towards faster and more convenient shipping solutions compared to walk-in courier and prepaid services.

COURIER SERVICES ACCESSIBILITY

In 2024, a total of 18,766 courier infrastructures operating as an essential logistic network are depicted in Figure 6.16. Branches and franchises experienced growth from 2023 to 2024, with branches increasing from 838 to 852 and franchises from 416 to 541. This suggests a strategic expansion to enhance accessibility and offer more localised courier services.

Further, gateways, which serve as key transit points in international logistics, saw a slight increase from 50 in 2023 to 58 in 2024, reflecting a growing demand for cross-border shipping solutions. Meanwhile, other infrastructure types were reduced in 2024 as companies optimised their logistic networks by scaling back underutilised infrastructures while expanding branches, franchises, and international logistics gateways to meet the evolving demands of e-commerce and global trade. Overall, the changes in courier infrastructures reflect a broader trend towards enhancing efficiency and a strategic balance between automation and physical presence.

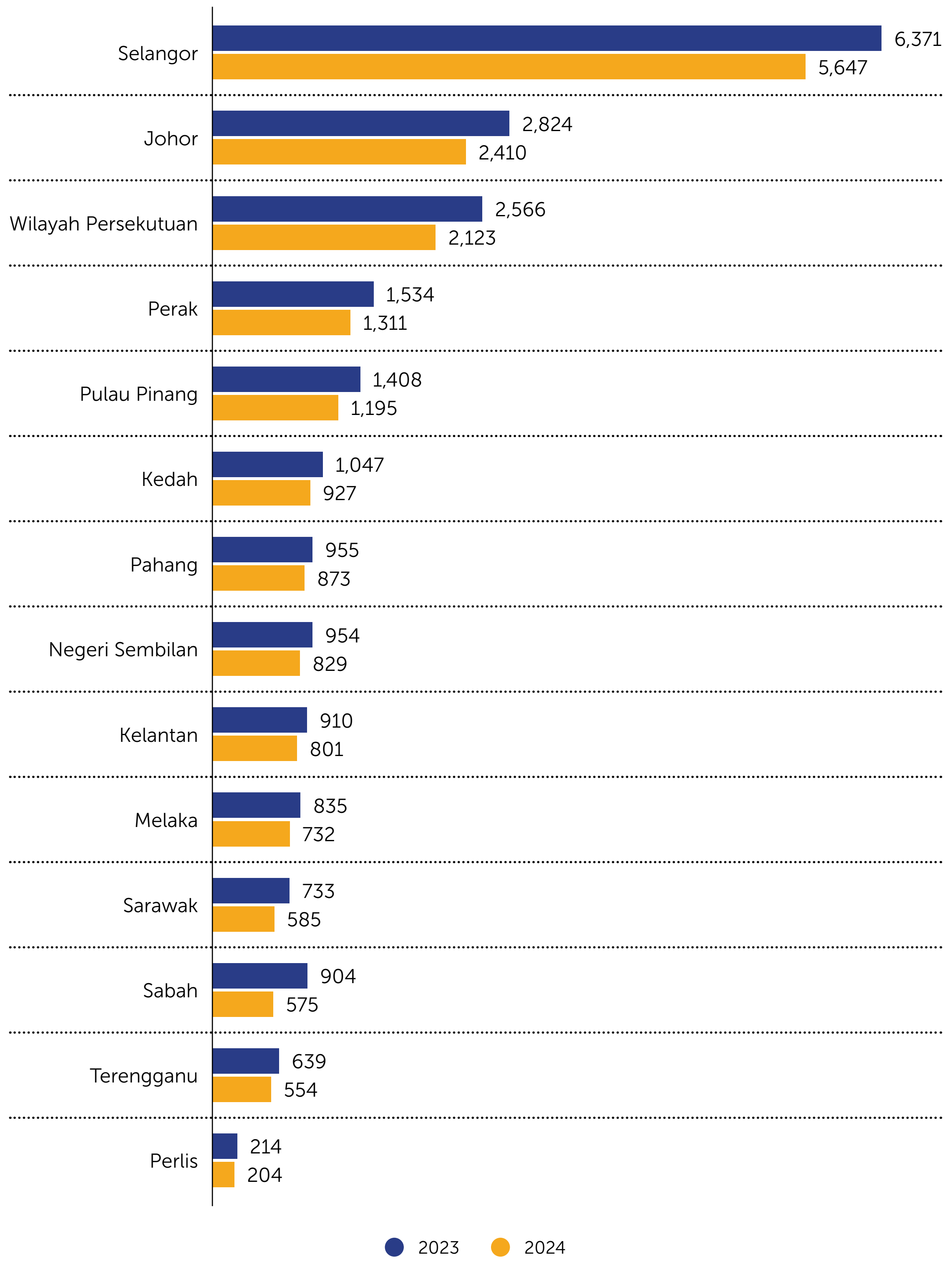
TYPES OF COURIER INFRASTRUCTURES 2023-2024



Source: *MCMC*
Figure 6.16: *Types of Courier Infrastructures 2023-2024*

These infrastructures are distributed across all states in Malaysia, as illustrated in Figure 6.17, underscoring the strategic commitment to ensure nationwide coverage and accessibility throughout the country. Selangor, Johor, and Wilayah Persekutuan have consistently maintained the highest number of courier infrastructures since 2023. This emphasises the significant delivery demand in these states along with the continuous couriers' commitment to reduce delivery times and enhance consumer satisfaction.

COURIER INFRASTRUCTURES BY STATE 2023-2024

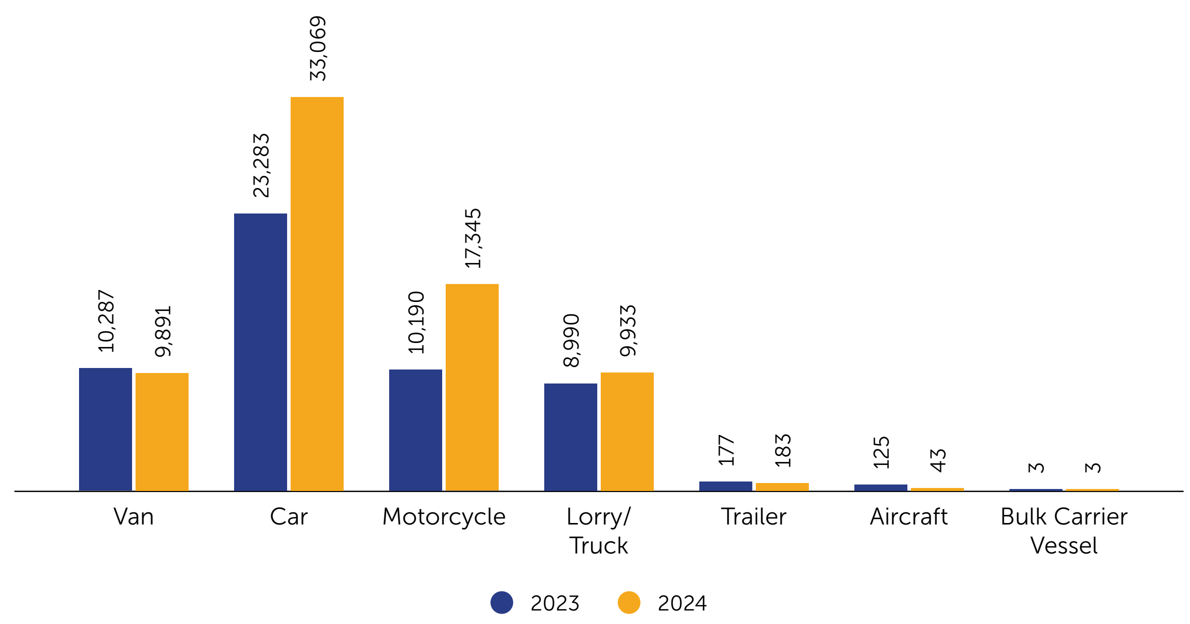


Source: MCMC
Figure 6.17: Courier Infrastructures by State 2023-2024

Courier vehicles

A robust courier infrastructure also relies heavily on an efficient fleet of vehicles to ensure timely and reliable deliveries. As e-commerce and logistics demands evolve, courier companies continue to optimise their vehicle choices to balance speed, cost and capacity. In 2024, total of 70,467 courier vehicles were in operation with vans, motorcycles, and cars being the three most commonly used vehicle types.

COURIER VEHICLES 2023-2024



Source: *MCMC*
Figure 6.18: *Courier Vehicles 2023-2024*

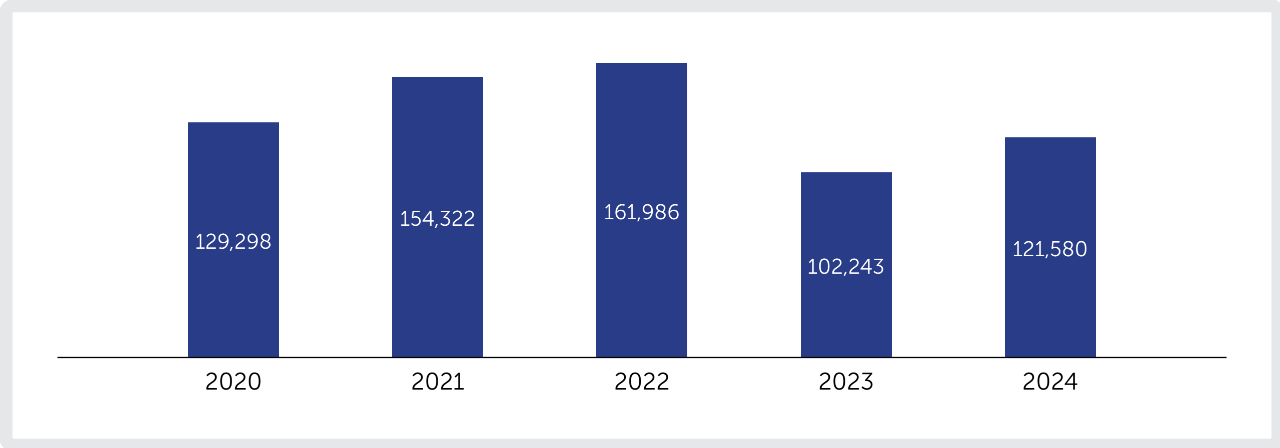
Courier companies were optimising their fleet of vehicles by adding more cars, motorcycles, and lorries to accommodate the increasing demand for both urban and intercity deliveries in 2024. Cars led by a significant margin with 33,069 vehicles, making them the most preferred choice due to their versatility in handling city routes as well as longer-distance travel. Motorcycles followed with 17,345 units, reflecting their crucial role in ensuring fast last-mile deliveries, particularly in navigating congested areas. Their numbers grew compared to 2023, underscoring their importance for speed and efficiency.

Vans, on the other hand, saw a slight reduction to 9,891 units in 2024, compared to 10,287 in 2023. This drop suggests a clear shift away from larger-capacity vans towards more flexible and scalable vehicle options. Meanwhile, lorries/trucks recorded 9,933 vehicles, indicating a steady need for heavy-load transportation. Though their numbers increased slightly from 2023, they remain an essential backbone for bulk deliveries. Overall, the shift in numbers highlights a strategic rebalancing of fleets towards cars and motorcycles for flexibility and efficiency, while still maintaining lorries for larger cargo.

COURIER EMPLOYMENT

Courier employment underwent stable growth from 2020 to 2022, rising from 129,298 in 2020 to a peak of 161,986 in 2022. However, this upward trend was abruptly reversed in 2023 following the withdrawal of Grab from the list of licensed courier service providers in the same year. The withdrawal contributed to the sharp decline by 36.88%, reducing the number of courier employees to 102,243 as Grab employees were excluded from the total courier employment. Despite this setback, courier employment began to show signs of recovery in 2024 with a significant increase by 18.91% reaching the total of 121,580 employees.

COURIER EMPLOYMENT 2020-2024

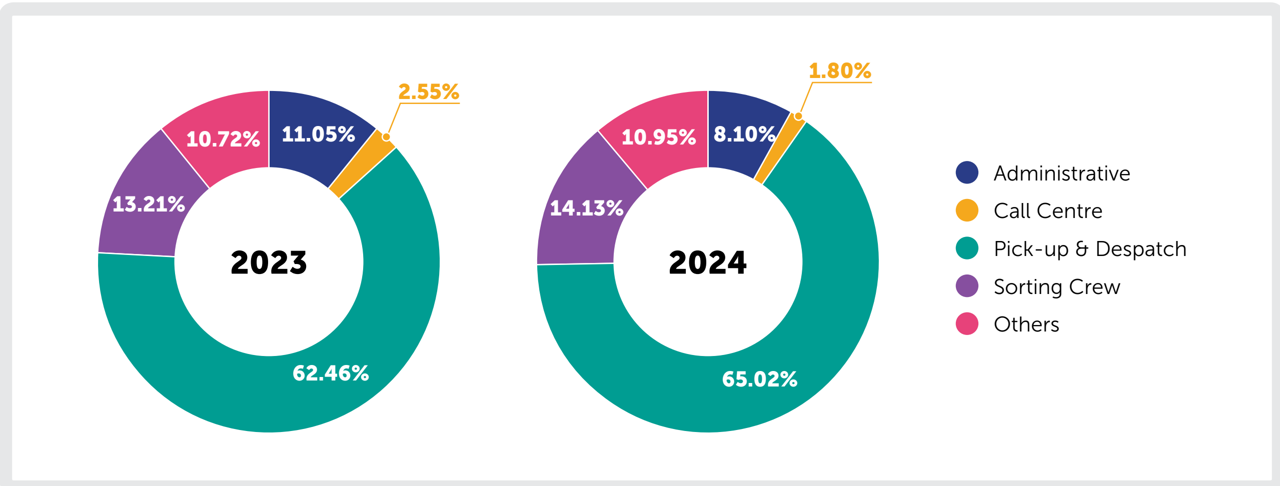


Source: *MCMC*
Figure 6.19: *Courier Employment 2020-2024*

Alongside the overall employment trend, there have also been notable shifts in job composition within the courier sector between 2023 and 2024. The proportion of employees working as pick-up and despatch roles increased from 62.46% in 2023 to 65.02% in 2024, corresponding to the addition of motorcycles within courier fleets which further reinforced the dominance of last-mile delivery functions.

Sorting crews were also added from 13,508 in 2023 to 17,174 in 2024 to manage the growing volume of parcels and packages. The increase underscores the need for additional manpower to maintain operational efficiency and ensure timely processing in response to the rising demand.

COURIER EMPLOYMENT BY CATEGORY 2023-2024



Source: *MCMC*
Figure 6.20: *Courier Employment by Category 2023-2024*

In contrast, employment in administrative and call centre roles declined following the integration of automation in these areas to streamline back-office operations and enable workforce to focus more on core logistics functions. Overall, while employment in the courier sector is gradually recovering, the workforce structure is shifting towards a more operationally focused model and technology is playing an increasingly vital role in supporting and optimising delivery services.

HARI KURIER NEGARA

The courier sector plays a crucial role as one of the key enablers in Malaysia's e-commerce ecosystem. The COVID-19 pandemic accelerated technological adoption among Malaysians and spurred a significant increase in e-commerce activities. This shift led to heightened demand for courier services, further strengthening the sector's contribution to the national economy. During the Movement Control Order (MCO), the Government recognised the courier sector as an essential service, acknowledging its critical role in sustaining businesses and meeting societal needs. At the time, courier workers emerged as vital frontliners, ensuring continuity in service delivery and supporting both consumers and industries.

On 1 December 2023, the Cabinet approved the establishment of *Hari Kurier Negara*, to be celebrated annually on 1 November. The initiative aims to recognise the significance and contributions of the courier sector in driving national economic growth, while increasing awareness on the sector's essential role in supporting communities and businesses. It also seeks to honour the dedication and commitment of courier workers who ensure efficient and reliable service delivery.

The inaugural of *Hari Kurier Negara* was launched on 9 November 2024 by YBhg. Fahmi Fadzil, Minister of Communications, at Cyber Event Hall, Cyberjaya. Key highlights of the event included the signing of a Memorandum of Understanding between the Postal Forum, the Malaysian Road Safety Research Institute, and Universiti Tun Hussein Onn Malaysia for the Courier Safety Passport Training Programme, as well as the presentation of awards to outstanding courier workers and winners of the *Hari Kurier Negara* 2024 logo competition.

OPENING REMARKS BY YB DATUK FAHMI FADZIL

Source: *MCMC*

The inaugural celebration has had a positive impact on the courier sector, the Government and consumers, reinforcing the sector's integral role in national development. Key outcomes include:

A

Increased Sector Recognition

The event enhanced public awareness of the courier sector's contributions, particularly in enabling e-commerce, logistics and economic growth. Campaigns and recognition programmes highlighted the sector's importance, leading to stronger public and governmental support.

B

Sector Recognition and Awards

The recognition and awards celebrated outstanding companies and individuals in categories such as operational excellence, delivery performance and innovation. Acknowledging exceptional service has motivated industry players to continuously raise standards.

C

Promotion of Best Practices

Recognising high-performing companies and professionals has provided a benchmark for excellence. This in turn, encourages the wider sector to adopt innovative and high-quality service delivery practices.

Hari Kurier Negara holds strong potential to enhance sector visibility, improve workforce morale and boost public appreciation. By celebrating the contributions of the courier sector, the event not only motivates workforce but also contributes to broader economic growth. Moving forward, *Hari Kurier Negara* will continue to serve as a platform to recognise achievements and inspire ongoing innovation and development within the sector.

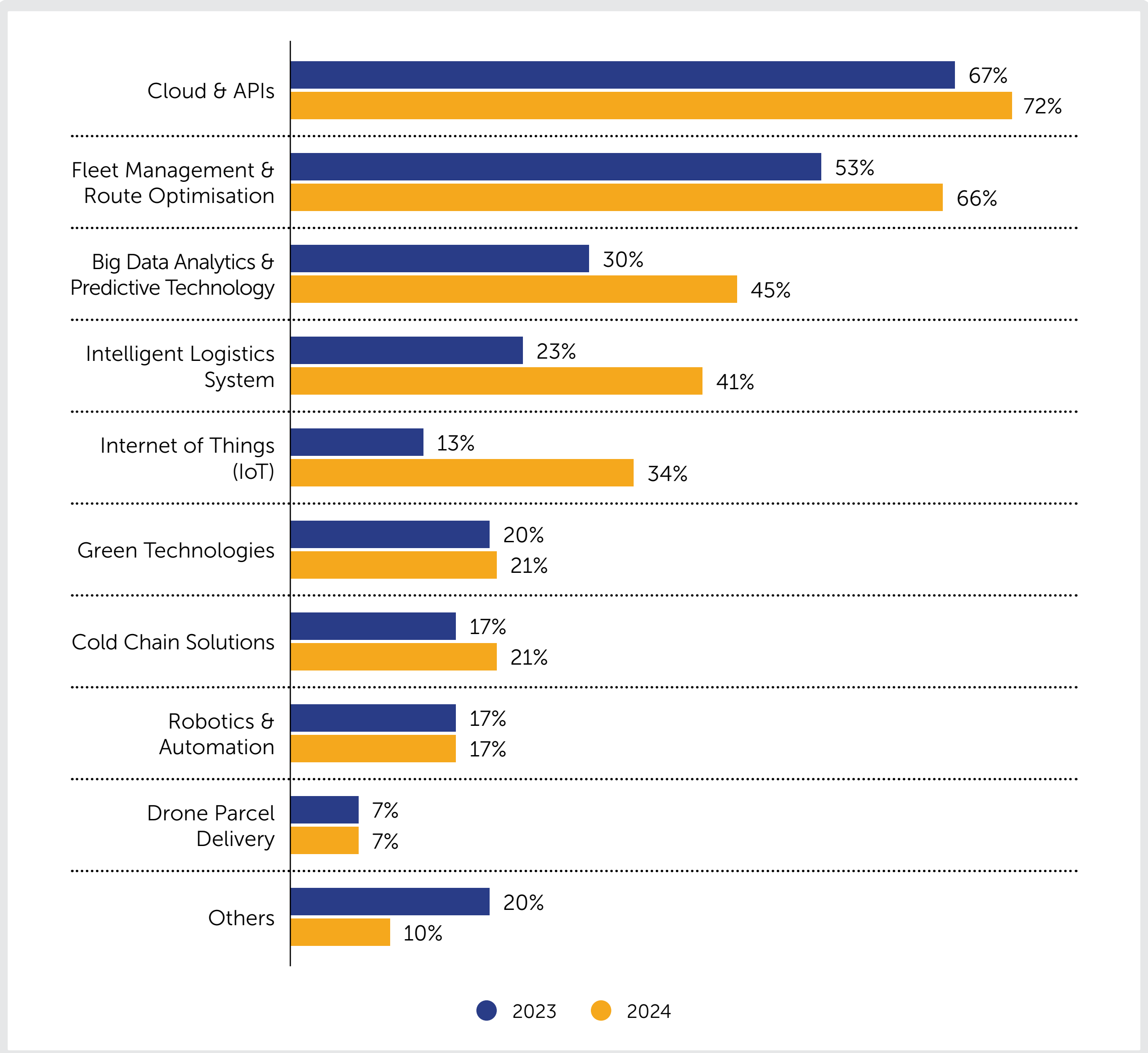
BUSINESS INNOVATION AND SUSTAINABILITY STRATEGIES

To remain competitive and future-ready, courier companies are increasingly prioritising innovation and long-term resilience. Pos Malaysia and other courier companies are focusing on technology integration and sustainable solutions to accommodate evolving customer needs and maintain pertinence in an era dominated by e-commerce and online communication.

TECHNOLOGY ADOPTION

Overall, most technology listed in Figure 6.21 portrayed increasing adoption by the postal and courier service providers[1]. Among these technologies, Cloud and Application Programming Interfaces (API), Fleet Management and Route Optimisation, as well as Big Data Analysis and Predictive Technology remained as the top three technologies implemented in 2024. Pos Malaysia, SPX Express Malaysia, Ninja Logistics, and Cargomind were among the service providers who have integrated all three technologies to optimise operations.

TECHNOLOGY ADOPTION BY POSTAL & COURIER SERVICE PROVIDERS 2023-2024



Source: *Industry*
Figure 6.21: *Technology Adoption by Postal & Courier Service Providers 2023-2024*

[1] *Data retrieved from 29 postal and courier service providers who responded to the Industry Performance Report Questionnaire 2024.*

Pos Malaysia and another 20 courier service providers adopted a scalable AWS Cloud infrastructure with real-time monitoring to support critical systems and ensure operational reliability. Enhanced Cloud and API integration streamlines communication across platforms, enabling real-time data access and seamless integration with partners and e-commerce systems. API usage also includes integration with e-commerce platforms, payment gateways and warehouse systems, streamlining the entire delivery ecosystem.

Other than that, Pos Malaysia deployed Artificial Intelligence (AI) technology by applying Machine Learning (ML) to automate internal processes, support cross-selling and upselling opportunities, along with enabling proactive communication with customers particularly in cases of potential delivery delays.

Fleet management and route optimisation technologies became the second most widely adopted in 2024, with 19 service providers utilising them for real-time vehicle monitoring, predictive maintenance and fuel efficiency improvements. These tools help dispatchers allocate resources more effectively and minimise delivery times by identifying the most efficient routes based on live traffic data, delivery schedules and weather conditions. In doing so, they reduce operational costs while boosting reliability and customer satisfaction.

In addition, iMile Logistics Services highlighted that their fleet management system would reduce fuel consumption and greenhouse gas emissions, while also optimising the delivery process to minimise driver stress and fatigue. As a result, this technology not only enhance operational efficiency but also contributes to a healthier and more sustainable society.

6

SUSTAINABILITY INITIATIVES

Building on the operational benefits of new technologies, postal and courier service providers are also embracing a broader range of sustainability initiatives aligned with the principles of Environmental, Social, and Governance (ESG). ESG represents the three key pillars used to evaluate a company's overall sustainability and ethical impact. In 2024, 23 service providers (79.31%) reported their continuous efforts to implement sustainable strategies addressing one of these key pillars[2].

The environmental component focuses on how a company manages its environmental impact. This includes initiatives such as the use of electric vehicles, eco-friendly packaging, route optimisation to lower emissions and the integration of green technologies into daily operations. City-Link Express Malaysia expressed that as e-commerce continues to grow, the company deployed green poly mailers made from recycled and recyclable content, which reduced environmental impact, conserved resources and reduced carbon footprint. World Asia Logistics, World Courier Malaysia and ADS International Express initiated recycling programmes. ADS International Express specifically reused shipment packaging waste such as shrink wrap and plastic flyers, as shipments protector or insulator rather than discarding them immediately.

The social aspect relates to how companies engage with employees and society. This includes employee well-being, diversity and inclusion, community involvement, customer privacy and ethical labour practices. CommerceOne Asia introduced daily operational and office recycling programmes, complemented by employee reward systems. These initiatives not only reduced environmental impact but also promoted ESG awareness among staff and the broader community. J&T Cargo Malaysia prioritised employee well-being by ensuring safe working environments, encouraging staff to report any mental health and physical health issues, as well as providing proper training to strengthen workforce capabilities.

The governance pillar addresses the systems and policies that promote ethical business conduct including transparent leadership, compliance with regulations, anti-corruption measures and accountability in decision-making. SPX Express Malaysia collaborated with MCMC to ensure full regulatory compliance, while strengthening internal policies on data privacy and cybersecurity to safeguard customer information. J&T Cargo Malaysia reaffirmed its commitment to legal compliance, particularly in environmental and labour laws, by partnering with suppliers and vendors that embrace ESG principles. These commitments contribute to the development of a more sustainable logistics supply chain.

To further support sustainability within the sector, Pos Malaysia launched the Pos Hijau Carbon Emissions Report in 2024. This innovative tool helps Malaysian businesses track and measure their Scope 3 carbon emissions. The report provides comprehensive insights and robust tracking capabilities to help them systematically track, quantify and manage their carbon footprint in a transparent, clear and consistent manner.

[2] *Data retrieved from 29 postal and courier service providers who responded to the Industry Performance Report Questionnaire 2024.*

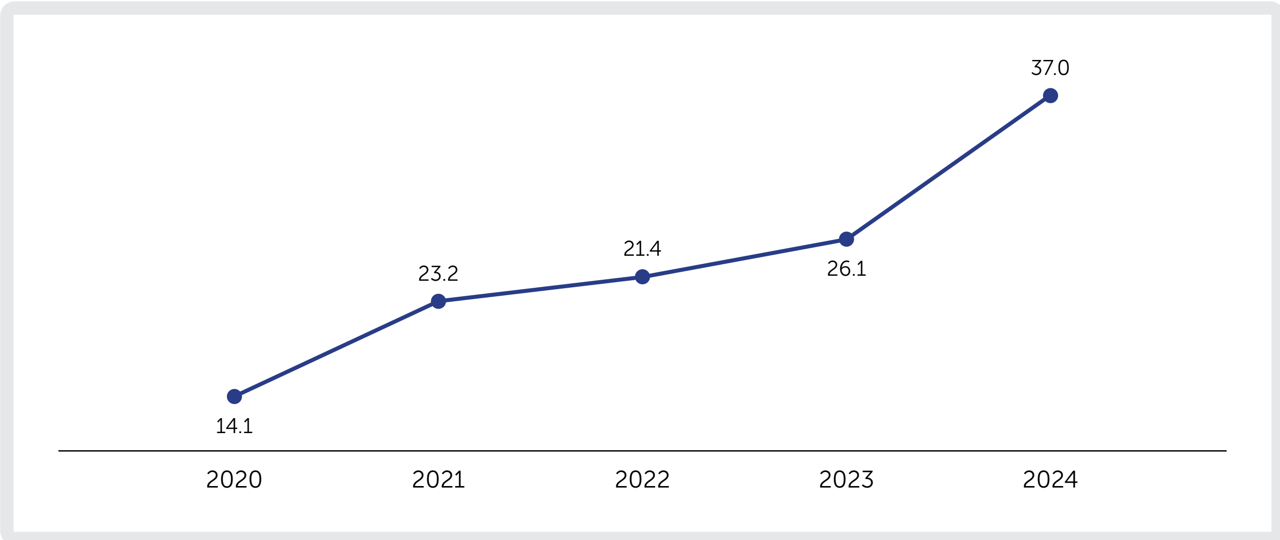
PELAN ACCELERATOR KURIER NEGARA

PAKEJ was developed as a strategic initiative under the National Postal and Courier Industry Laboratory (NPCIL) to enhance the efficiency, accessibility and sustainability of Malaysia's postal and courier sector. The implementation of PAKEJ is anchored on key business initiatives aimed at optimising service quality, strengthening industry resilience, and promoting digital transformation to support the growing demands of the e-commerce-driven economy.

Since its introduction in 2021, PAKEJ has been a key driver of industry transformation with a focus on enhancing service delivery, improving market competitiveness and maintaining high-quality standards across postal and courier services. It has enabled industry's ability to adapt to technological advancements and ensured that Malaysia's logistics ecosystem remains aligned with global e-commerce developments.

One of PAKEJ's notable achievements has been its role in driving parcel volume growth, as reflected in the Parcel Per Capita metric. As at the end of 2024, Malaysia recorded 37.0 parcels per capita, exceeding the initial target of achieving 30 parcels per capita by 2025. This exceptional achievement of a 41.76% increase from 2023 underscores the increasing reliance on efficient and reliable postal and courier services.

PARCEL PER CAPITA 2020-2024



Source: *MCMC*
Figure 6.22: *Parcel per Capita 2020-2024*

PAKEJ+ SUSTAINABILITY GOALS AND INITIATIVES

The PAKEJ & Sustainability Industry Workshop, held on 23 and 24 April 2024 with the theme "Collective Vision, Shared Responsibilities," aimed to integrate sustainability elements into the existing PAKEJ programme. The workshop was attended by over 60 participants, including representatives from major industry players, the Ministry of Communication, MCMC, and other relevant agencies. A series of engagement sessions were conducted prior to the workshop to gather input and feedback, align goals and expectations, and ensure transparency and accountability throughout the process.

Several outcomes have been achieved through this workshop, including the drafting of ESG Commitment Statements, the formation of three industry working groups to address specific ESG matters, and the identification of targeted sustainability goals. The integration of ESG components into the current PAKEJ programme named PAKEJ+ introduces additional measures to advance sustainability objectives in response to growing environmental, social, and governance concerns, as illustrated in Figure 6.23 and Figure 6.24.

PAKEJ+ INITIATIVES

TRUE NORTH

Delivering Quality of Service and Seamless Coverage to all Malaysians **sustainably to support** the projected e-commerce industry growth from 14 parcels per capita in 2020 to **30 parcels per capita by 2025**

SUSTAINABILITY

Environmental	Social	Governance

BUSINESS	POLICY & REGULATORY
B1 Rangkaian PAKEJ	R1 Implementation of Pricing Guidelines for Parcels
B2 Collaborative Efforts towards Cost Efficiency	R2 Postal Services Act 2012 Review
B3 Postal Commercial Vehicle Enhancement Proposal	R3 QoS Mechanism & Consumer Protection
B4 Courier Infrastructure & Analytics	
B5 National Address System	

Source: *MCMC*
Figure 6.23: *PAKEJ+ Initiatives*

SUSTAINABILITY GOALS AND INITIATIVES

KPI 1: # EV Deployment
- ESG Framework
- Postal & Courier Network Sharing Framework
- Green Courier Definition

KPI 2: # Pilot Green Delivery Zone
- Green Delivery Zone Concept
- Facilitate Pilot Green Delivery Zone

KPI 3: % CO_2 Baseline Report
- Industry Standard Tool for CO_2 Emission
- Courier Innovation Day

KPI 4: # Upskilling Initiatives
- Skill Development Framework
- Strategic Collaboration with Higher Learning Institutions
- Trained and Skilled Personnel Recommendations

KPI 5: # Safety Rating Qualification
- National Courier Day
- Health and Safety Recommendations
- Consumer Satisfaction Recommendations

KPI 6: # Awareness Programmes
- Cybersecurity & Data Protection
- Postal Security
- Sustainability in Industry Codes of Practice

KPI 7: # Law Enforcement Collaboration
- Enhanced Safety & Security Regulatory Requirements
- Law Enforcement Collaboration

Source: *MCMC*
Figure 6.24: *Sustainability Goals and Initiatives*

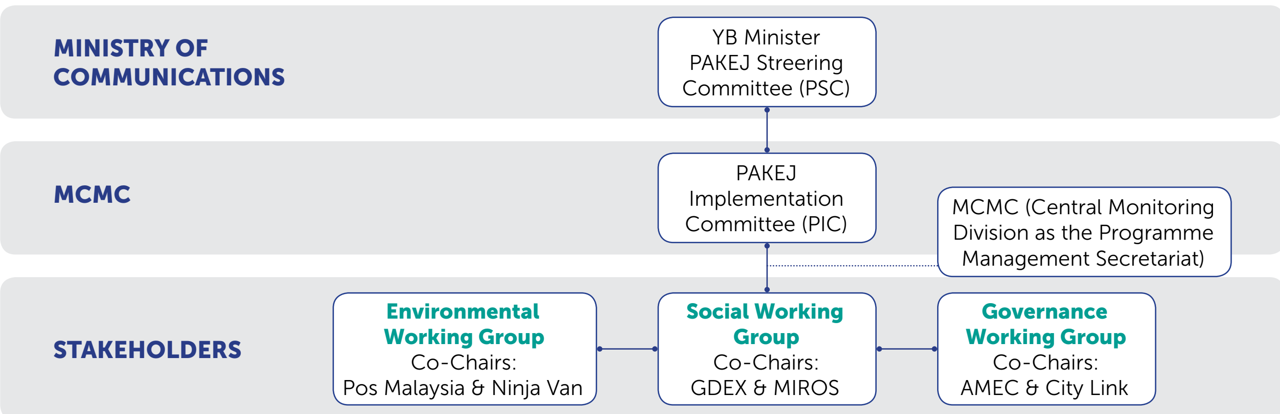
During the workshop, three working groups were established to further examine ESG-related issues which will be integrated under the PAKEJ Implementation Committee. The co-chairs for these working groups were elected during the workshop and their appointments were subsequently approved by MCMC, as follows:

A
Environmental Study Working Group (EWG): co-chairs are Pos Malaysia and Ninja Van.

B
Social Study Working Group (SWG): co-chairs are GD Express and the Malaysian Institute of Road Safety.

C
Governance Study Working Group (GWG): co-chairs are the Association of Malaysian Express Carriers and City Link Express.

PAKEJ WORKING GROUP GOVERNANCE STRUCTURE



Source: *MCMC*
Figure 6.25: *PAKEJ Working Group Governance Structure*

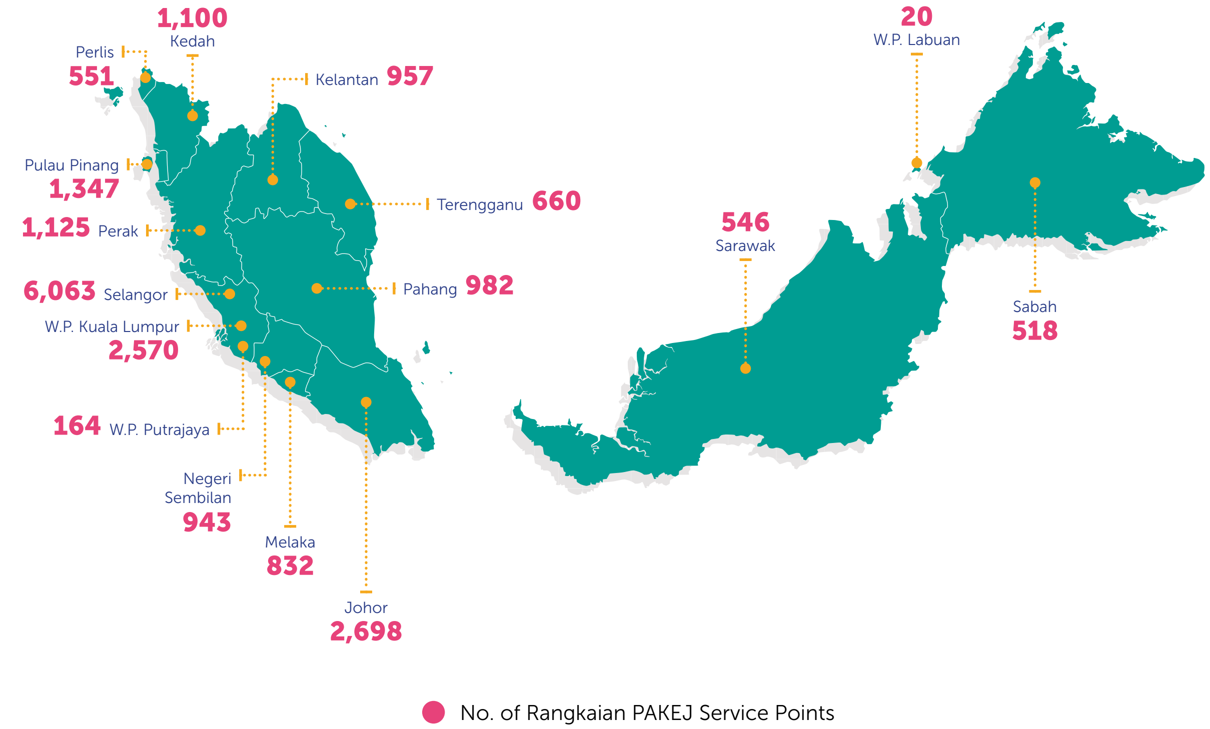
The formation of these working groups under PAKEJ+ marks a significant step towards embedding sustainability within the programme's core objectives. With seven key KPIs and 18 targeted initiatives, this collaborative effort between MCMC and the Industry Working Group aims to drive meaningful progress. Through regular quarterly meetings for coordination and reporting, these working groups will ensure continuous alignment and effective implementation, ultimately contributing to the achievement of PAKEJ+ goals and fostering a more sustainable future for the sector.

PILLAR 1: BUSINESS INNOVATION

Rangkaian PAKEJ initiative has been a major factor in improving last-mile delivery services and consumer accessibility. Through collaboration between MCMC, postal and courier service providers, and third-party logistics (3PL) operators, Rangkaian PAKEJ has expanded into a critical component of Malaysia's logistics infrastructure.

As at Q3 2024, there are 21,071 Rangkaian PAKEJ service points, supported by 24 Rangkaian PAKEJ service providers. This refined network structure ensures more efficient service distribution, optimised logistics planning, and enhanced consumer experience.

DISTRIBUTION OF RANGKAIAN PAKEJ SERVICE POINTS IN 2024



Source: *MCMC*
Figure 6.26: *Distribution of Rangkaian PAKEJ Service Points in 2024*

To further expand the Rangkaian PAKEJ service points, MCMC, in collaboration with courier industry players and 3PL providers, leveraged the existing National Information Dissemination Centre (NADI) network across Malaysia, particularly in rural areas. This initiative expanded NADI's role beyond providing internet access and ICT facilities, positioning it as a strategic hub for community engagement in e-commerce and enhancing socioeconomic opportunities.

MCMC also partnered with courier industry stakeholders and NADI's Technology Providers to assess the relevance of selected NADI locations for operating Rangkaian PAKEJ services. The evaluation focuses on infrastructure readiness and location feasibility to support effective logistics operations. Furthermore, this initiative connects local online entrepreneurs with Rangkaian PAKEJ services, encouraging uptake and sustaining the continuity of service delivery through NADI.

As of Q3 2024, the number of Rangkaian PAKEJ service points at NADI has increased from 527 in 2023 to 695 in 2024. This development supports the core objectives of Rangkaian PAKEJ at NADI, which are:

I

Enhanced Community Access

Providing convenient parcel collection and delivery services to improve last-mile delivery experiences.

II

Business Transformation

Supporting entrepreneurs and communities in adopting online business models.

III

Socioeconomic Growth

Encouraging e-commerce activities and creating job opportunities.

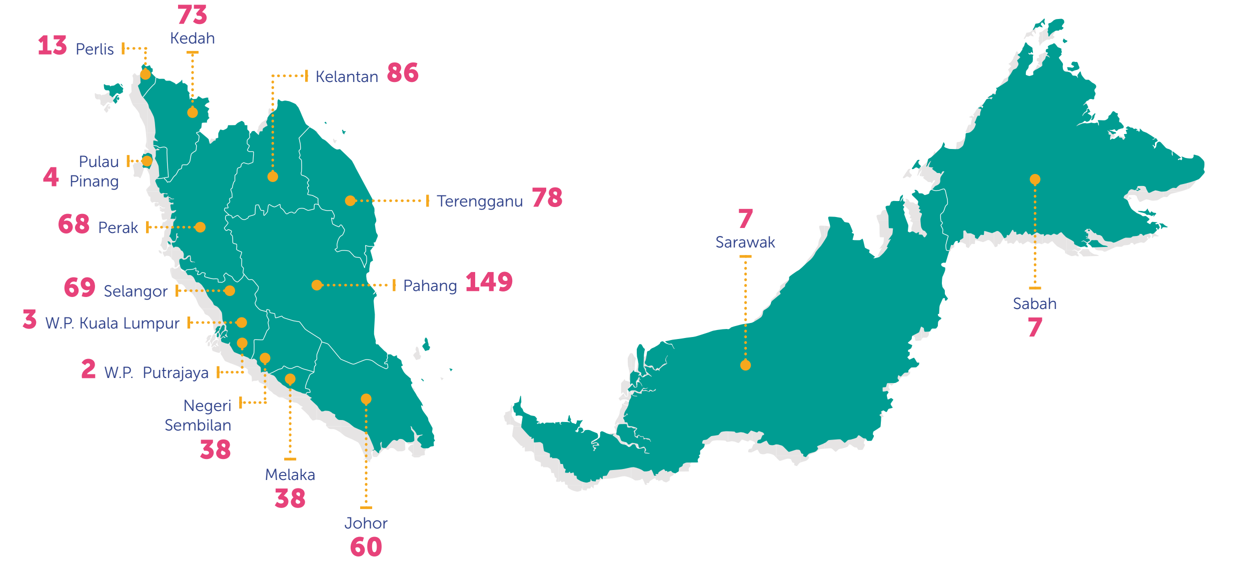
IV

Value-Added Services for NADI

Enhancing NADI's offerings, particularly in relation to NADI services.

This initiative is closely aligned with the **PAKEJ Blueprint,** which emphasises the **4R principles** of **Reliability, Reach, Relevance, and Resilience,** ensuring sustainable and effective expansion of logistics services across Malaysia.

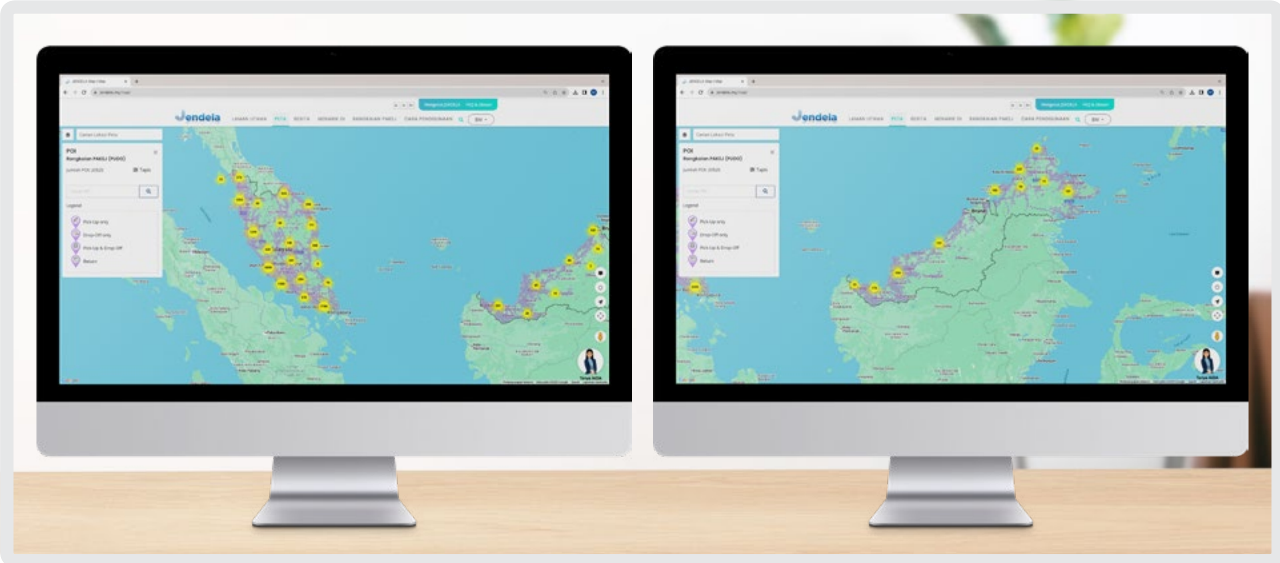
RANGKAIAN PAKEJ SERVICES AT NADI BY STATES IN 2024



Source: *MCMC*
Figure 6.27: *Rangkaian PAKEJ Services at NADI By States in 2024*

Concurrently, Courier Infrastructure and Analytics initiative was introduced to map out the overall courier infrastructure network, as illustrated below. The Rangkaian PAKEJ Map was launched in 2022 through the JENDELA portal to allow users to search for courier services available within their vicinity. This feature is accessible via the following link: jendela.my/map/.

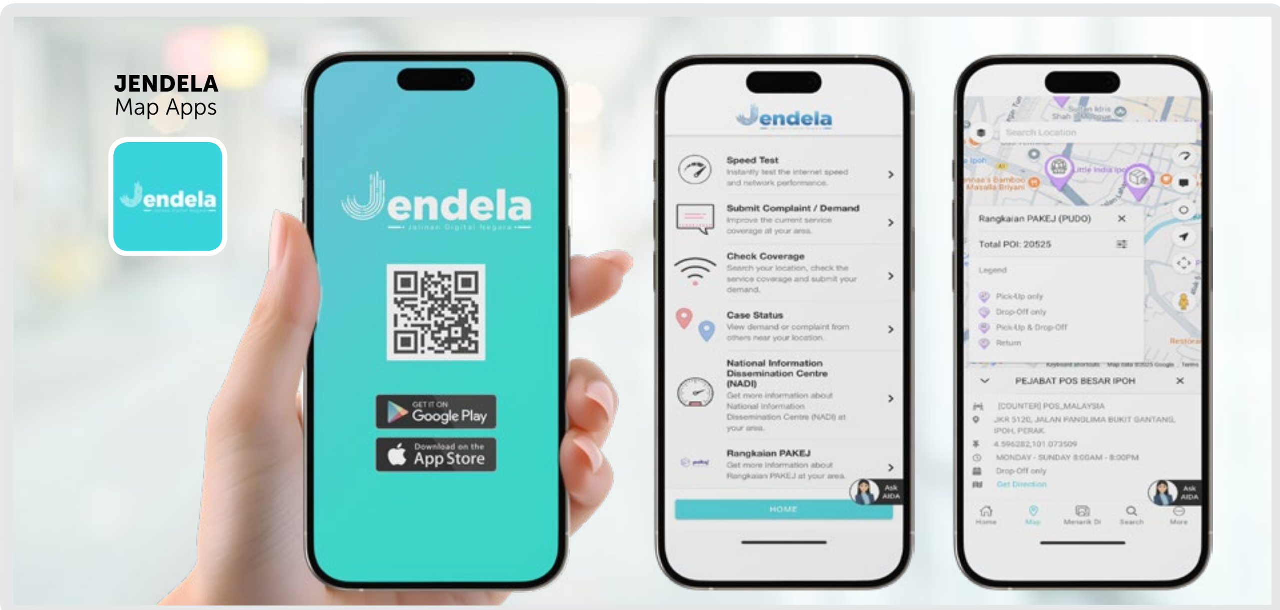
RANGKAIAN PAKEJ MAP IN JENDELA PORTAL



Source: *MCMC*

This initiative also leveraged data analytics technologies to improve courier network efficiency and the quality of services. Courier service providers can utilise the map to identify areas where additional investment or infrastructure adjustments are needed to improve reachability and effectiveness of their services. In addition, the map is also available on JENDELA mobile application to enhance accessibility and the convenience of online services. Designed to support users requiring immediate parcel delivery while on the go, this feature facilitates faster and more informed decision-making.

RANGKAIAN PAKEJ MAP IN JENDELA MOBILE APPLICATION



Source: *MCMC*

Moreover, the National Address System initiative aims to establish a standardised and accurate national address framework, supporting better delivery precision and operational scalability across the logistics ecosystem. Beyond these ongoing strategic initiatives, the collaborative efforts aimed at driving cost efficiency and enhancing parcel commercial vehicles were successfully completed in 2023. These achievements demonstrate MCMC's continuous focus on operational excellence and resource optimisation, contributing to stronger performance and sustainable growth.

PILLAR 2: POLICY & REGULATION

Implementation of Pricing Guidelines for Parcel Weighing 2kg and below

The introduction of a reference price for the courier sector is aimed at preventing anti-competitive practices, ensuring a fair market environment and improving worker welfare. Through this measure, MCMC aims to uphold consumer protection while promoting healthy competition of the postal and courier sector.

In April 2022, the Pricing Guideline came into effect, setting a reference price of RM4 for parcels of 2kg and below. However, following its implementation, the Association of Malaysian Express Carriers (AMEC) submitted a formal request for a revision of the reference price, citing factors such as the revision of the national minimum wage and inflationary pressures affecting industry costs.

In response to these concerns, MCMC initiated a comprehensive study in 2023, engaging with industry stakeholders to assess the economic impact of cost fluctuations on courier operations. Several rounds of discussions were held with industry representatives and relevant stakeholders to evaluate the feasibility of revising the reference price.

Based on the findings of this study and industry feedback, the revision of the reference price was approved and adjusted to RM5, effective 1 December 2024. This adjustment reflects the evolving cost structure within the courier sector and supports service providers in continuing to offer affordable and competitive delivery services.

The reference price serves as a guideline to encourage self-regulation within the sector. All licensed courier service providers are required to periodically declare their pricing structures to MCMC. This measure enables continuous monitoring of pricing trends, ensuring that anti-competitive practices, including price dumping are effectively curbed. MCMC will continue to review pricing strategies, analyse financial sustainability indicators, and implement further policy enhancements as necessary to safeguard a healthy and competitive market environment in Malaysia.

Year	Compliance to Reference Price (%)
2024	87.13
2023	96.49
2022	89.92
2021	87.60

Source: *MCMC*
Figure 6.28: *Compliance to Reference Price (%)*

Strategic Policy Study for Postal Services Act 2012 (PSA 2012) Review

The Postal Services Act 2012 has been in effect for over a decade, during which the postal sector has undergone significant transformation. Traditional letter delivery has been steadily declining, while parcel volumes have surged, driven by changing consumer behaviours. This shift has been further accelerated by the rise of e-commerce platforms and enhanced communication infrastructure.

Globally, several megatrends are shaping the postal sector. These include the adoption of new administrative systems to support technological initiatives by governments, as well as an increased demand for specialised expertise and skills. In addition, the rapid pace of technological advancements is leading to concentrated demand, while demographic shifts are resulting in uneven population distribution.

Given these evolving industry dynamics, it is evident that the future of the postal sector is increasingly reliant on courier services, with letter delivery services no longer being the primary driver of demand. However, ensuring the sustainability of Universal Service Obligation (USO) or letter delivery services remains crucial as they continue to play a fundamental role in providing essential communication and connectivity, particularly in underserved areas.

To remain relevant, the postal sector must undergo comprehensive reforms to ensure it remains affordable, efficient, and sustainable for all Malaysians. As courier services have become an essential component of daily life, there is a pressing need to reassess the regulatory framework for both universal and non-universal services. This will ensure that it aligns with the ever-changing consumer needs, while supporting the continued growth of the digital economy.

Recognising these challenges, MCMC is undertaking a strategic policy review study to obtain comprehensive insights into developing new policies and a forward-looking regulatory framework for the Malaysian postal and courier sector. Through a tender process, MCMC has appointed PEMANDU Associates Sdn. Bhd. (PEMANDU), in partnership with Analysys Mason, an international consulting firm, to conduct the study. The strategic policy study consists of four phases: Phase 1, Contextual Analysis and Global Benchmarking; Phase 2, Gap Analysis; Phase 3, Policy Recommendations; and Phase 4, Regulatory Framework Recommendations and Sector Development Initiatives.

The illustration below depicts the two main objectives of the study and the gap analysis on 18 proposed prospective key policy areas that need to be undertaken by the appointed consultant.

PSA2012 REVIEW STUDY OBJECTIVES AND 18 KEY AREAS OF THE STUDY

Objectives of the study	
1. Reform of the postal service industry and forward-looking regulatory framework; and	
2. Encourage the growth for the sustainability of the postal services industry.	
18 Identified key areas	
1. Universal Service Obligations	10. Postal Service Fund
2. Non-USO	11. Competition
3. Licensing	12. Security
4. Post Office Network	13. Enforcement
5. Postal Network	14. Information Sharing
6. Electronic Registered Letter	15. Postcode and Addressing System
7. Postal Forum	16. E-Commerce Platform
8. Mandatory Standard	17. Environmental, Social and Governance
9. Network Sharing	18. Others

Source: *MCMC*

This study is guided by two hypotheses, which will provide guidance to the three expected outcomes from the study in a form of Policy Recommendations, Regulatory Reform Framework, and Sector Development Initiatives, as highlighted below. Subsequently, the Policy Recommendations will be escalated to the Government via Memorandum Jemaah Menteri for approval.

STRATEGIC POLICY STUDY DELIVERABLES

The Study shall always be guided by these two hypotheses:

i. To ensure all consumers with Malaysia continue to receive universal postal services perpetually; and

ii. To offer competitive and reliable non-universal services to be determined by market forces.

Outlook and Gap Analysis

Deliverable 1:
Contextual analysis report - landscape and global benchmark

Deliverable 2:
Gap analysis on 18 proposed prospective policy areas

Policy Recommendations

Deliverable 3:
Policy recommendations report and presentation deck

Regulatory Reform Framework

Deliverable 4:
Regulatory reform framework report and sector development initiatives

Source: *MCMC*

Quality of Services Mechanism & Consumer Protection

Through the Postal Forum, MCMC produced the Code of Practice for Postal Services (CPPS) on 30 December 2024. The CPPS sets standards for the postal sector, serving as a reference for both consumers and licensees while acting as a self-regulatory framework for postal services. The CPPS is a significant step forward in MCMC's commitment to improve consumer trust and ensure consistent service excellence. It also includes guidelines on complaint handling, service performance, and consumer rights. The CPPS is available on the Postal Forum's website and accessible via the link: https://postalforum.my/cpps.

MALAYSIA-POSTAL SECURITY GROUP (MY-PSG) TASKFORCE

The extensive reach of postal networks, along with the anonymous and concealed nature of postal article traffic, has made them attractive targets for criminals seeking to transport illicit goods, counterfeit products, or illegal substances across national and international borders. This creates significant challenges for law enforcement agencies in tracking and intercepting such shipments.

The vulnerability of postal networks poses serious implications for national security, including threats to public safety, erosion of public trust, reputational damage, and potential revenue loss. Therefore, it is essential to implement sound postal security policies and foster collaborative measures to strengthen security protocols and inspection procedures, improve information sharing to combat illicit activities, and uphold the integrity of postal networks.

SECURITY THREATS TO POSTAL AND COURIER NETWORKS

Security threats to the postal and courier networks can have serious consequences on multiple fronts. They may disrupt logistics and e-commerce activities, thereby affecting economic growth. Such threats can also damage Malaysia's national reputation through the misuse of its logistics infrastructure for illegal purposes, and pose risks to public and national security due to the circulation of illicit goods, including drugs and contraband.

Published 22 February 2022

FRONTLINERS AT MALAYSIA'S INTERNATIONAL POSTAL HUB EQUIPPED WITH TOOLS TO DETECT WILDLIFE IN THE MAIL

Wildlife smuggling through parcels took centre stage at Malaysia's main international gateway for mail with the rollout of awareness materials and training for frontliners tasked with detecting such parcels at the Pos Malaysia International Hub (PMIH).

Source: *Wildlife Trafficking*

The Star

Tourism Ministry evacuated after bomb threat; package confirmed as fake

By JUSTIN ZACK

NATION

Wednesday, 05 Jun 2024 7:19 PM MYT

Source: *Bomb Threat Package*

Sabah Customs thwarts attempt to smuggle 205kg drugs worth RM6.85 million

The raiding team, which also included personnel from the Enforcement branch of the Kota Kinabalu International Airport found 15 boxes suspected of containing drugs.

23 Feb 2024 07:59pm

Sabah Zone Customs Assistant Director-General Datuk Mohd Nasir Deraman (three, left) showing the drugs weighing 205kg totaling RM6.85 million during a press conference today. - Photo by Bernama

Source: *Drug Smuggling Attempt*

Year	Total Cases of Drug Shipments
2022	56
2023	48
2024	64

Source: *Narcotics Criminal Investigation Department, Royal Malaysia Police (Bukit Aman)*
Figure 6.29: *Total Cases of Drug Shipments via Post and Courier by PDRM*

Year	Total Cases of Drug Shipments
2022	47
2023	116
2024	127

Source: *Royal Malaysian Customs Department*
Figure 6.30: *Total Drug Shipments via Post and Courier Detected at the International Mail Processing Centre (PMIH)*

STRATEGIC PARTNERSHIPS THROUGH MY-PSG TASKFORCE

The Cabinet Committee Meeting on *Jawatankuasa Kabinet Membanteras Gejala Dadah* (JKMD), chaired by YAB Deputy Prime Minister of Malaysia, Dato' Seri Dr. Ahmad Zahid Hamidi, invited MCMC to collaborate with the Royal Malaysia Police in curbing the misuse of courier services for the delivery of prohibited items. Following this, MCMC recommended to the Minister of Communications the establishment of a Postal Security Taskforce.

On 25 July 2023, the Minister of Communications approved the formation of the MY-PSG Taskforce as a collaborative platform between the Ministry and Enforcement Agencies to facilitate information sharing and enhance security cooperation in the postal and courier sector.

The MY-PSG platform includes members from the Ministry of Communications, Ministry of Health, Malaysian National Security Council, Royal Malaysia Police, Royal Malaysian Customs Department, and MCMC, which also serves as the Chairman and Secretariat of the MY-PSG Taskforce. In addition, experts and representatives from various agencies may be included on an invitation basis.

Under its governance structure, MY-PSG operates through two working groups to strengthen postal security and industry resilience:

Working Group 1
(Development of Security Governance)

Focuses on strengthening the security of the postal network through the development of governance structure, including standard procedures and postal security rules and guidelines.

Working Group 2
(Training & Capacity-Building Programmes)

Responsible for planning and implementing training and capacity-building programmes for industry players and key stakeholders.

The establishment of MY-PSG reflects the commitment of regulatory bodies and enforcement agencies to safeguard the integrity of Malaysia's postal and courier networks, ensuring they remain secure, reliable, and protected from the misuse of involving illicit activities.

MY-PSG ACTIVITIES IN 2024

MCMC convened the first meeting of the MY-PSG Taskforce in 2024 (Meeting No.1/2024) on 29 May 2024, followed by the second meeting, which was held on 18 December 2024 (Meeting No.2/2024) for a progress update and presentation of the next proposed action plan. Both meetings were chaired by MCMC with full attendance from the Taskforce members.

Source: *MCMC*

WORKING GROUP 1 (DEVELOPMENT OF SECURITY GOVERNANCE: DRAFT FOR POSTAL SERVICES (POSTAL SECURITY) RULES)

In accordance with the Commission's authority under Section 101(d) of the Postal Services Act 2012 (PSA2012), MCMC has formulated the draft Postal Services (Postal Security) Rules (hereinafter referred to as the "Rules"). These Rules define the minimum-security standards that courier licensees must adhere to under PSA 2012, ensuring the integrity, resilience, and security of postal network facilities and information systems.

The primary objective of the Rules is to strengthen postal security governance by establishing clear security measures aimed at mitigating potential risks, including criminal activities, illicit parcel shipments, and threats to national security. By implementing these measures, the Rules promote industry-wide compliance and risk management, fostering a secure and robust postal infrastructure capable of withstanding operational disruptions and illegal exploitations.

These Rules form part of a broader effort to enhance regulatory oversight, improve postal service reliability, and reinforce the security of Malaysia's logistics ecosystem, ensuring that the postal and courier industry continues to operate safely, efficiently, and in alignment with national security priorities.

As the Secretariat of MY-PSG, MCMC conducted a series of engagement sessions throughout 2024 with key stakeholders and industry players to gather feedback and recommendations for improving the draft Postal Security Rules. The engagement timeline is summarised below:

Date	Engagement Activity
2 April 2024	Input session with postal and courier industry players
21 May 2024	MY-PSG Working Group 1 Meeting (Development of Security Governance)
2 July 2024	Workshop on finalisation of the draft Postal Security Rules with MCMC internal departments, Working Group 1 of MY-PSG, industry players, and relevant stakeholders
5 July 2024	Engagement session with the Office of the Chief Government Security Officer (CGSO)
6 November 2024	Engagement Session with National Information Dissemination Centre (NADI)
14 November 2024	Engagement session with agencies, consumer associations, universities, and state agencies
22 November 2024	Internal briefing by MCMC on the Postal Security Rules

Source: *MCMC*

WORKING GROUP 2 (TRAINING & CAPACITY BUILDING PROGRAMMES)

The MY-PSG workforce has conducted the MY-PSG Awareness and Capacity Building Programme 2024, with the aim of enhancing industry awareness, strengthen security measures within postal and courier networks, and improve regulatory compliance at key national entry points.

Postal Security Training Programme with Industry Players (Session 1/2024), 7–8 March 2024

MCMC, in collaboration with the RMP, successfully held the first training on Postal Security with Industry Players from 7 to 8 March 2024. The session involved 40 participants from 13 licensed courier companies, pick-up and drop-off service providers, as well as the Postal Forum. The implementation of this programme involves an information sharing session by RMP and the MCMC, as well as a demonstration of drug detection led by experts from RMP experts.

Briefing by the Pharmaceutical Enforcement Division (BPFKKM) on Import Control at National Entry Points, 29 October 2024

The MCMC, in collaboration with the Pharmacy Enforcement Division of the Ministry of Health Malaysia (BPFKKM), organised an online briefing session on the Control of Imported Goods at the Country's Entry Points to raise awareness among postal and courier service providers and share the latest regulations regarding the importation of goods under BPFKKM's control that pass through the postal and courier network. This session was attended by 160 participants from the postal and courier industry players.

POSTAL SECURITY TRAINING PROGRAMME (7-8 MARCH 2024)

Source: *MCMC*

Source: *MCMC*

In total, more than 1,000 participants were involved in the various engagement sessions throughout 2024. The draft Postal Services (Postal Security) Rules have since been submitted to the Ministry of Communications for gazetting.

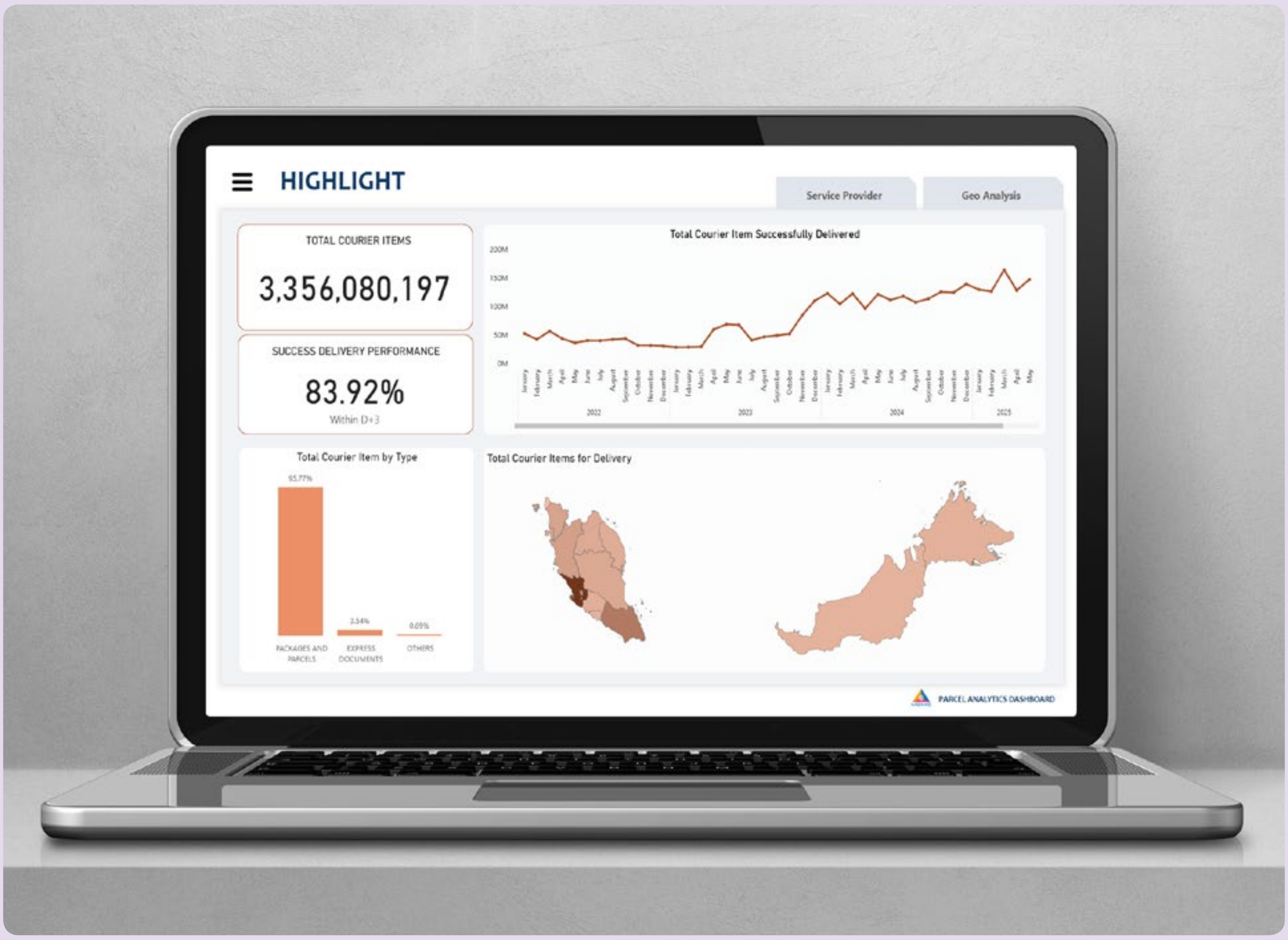
PARCEL ANALYTICS DASHBOARD MAPS MOMENTUM AND GROWTH IN THE COURIER MARKET

AS COURIER NETWORKS EXPAND AND PARCEL VOLUMES CLIMB, THE PARCEL ANALYTICS DASHBOARD IS CAPTURING THE INDUSTRY'S MOMENTUM AND POINTING TO WHERE GROWTH LIES AHEAD

The Parcel Analytics Dashboard, developed in 2022, gives the parcel delivery sector a clearer view of how volumes move across the country. Built on a dataset of more than two billion records and expanding month by month, the tool provides analysis not only at the national level but also down to granular postcode boundaries.

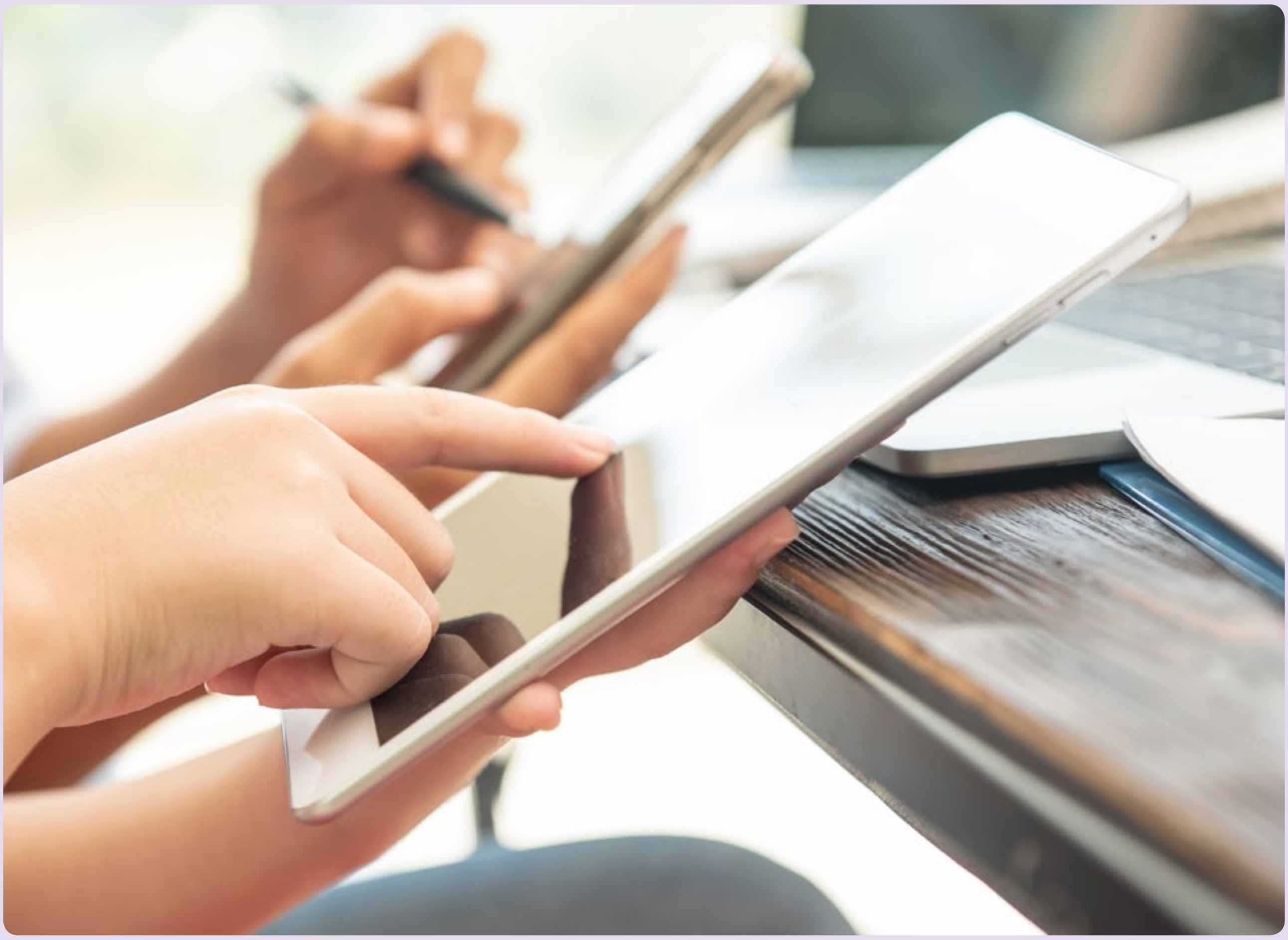
LANDING PAGE OF PARCEL ANALYTICS DASHBOARD

The dashboard is divided into four sections. Highlight offers a national overview of parcel activity. Service Providers drills into the performance of individual operators. Comparison Analysis sets courier performance side by side, while Geo Analysis maps traffic flows in detail across postcode boundaries.


HIGHLIGHT
Service Provider
Geo Analysis
TOTAL COURIER ITEMS
3,356,080,197
SUCCESS DELIVERY PERFORMANCE
83.92%
Within D+3
Total Courier Item Successfully Delivered
Total Courier Item by Type
Total Courier Items for Delivery
PARCEL ANALYTICS DASHBOARD


SERVICE PROVIDER
Highlight
Geo Analysis
COURIER LICENSEE
65
Details >
TOTAL COURIER ITEMS
3,356M
Total Courier Item Successfully Delivered
Total Courier Item by Success Delivery Performance
Distribution of Items across Origin and Success States
SELANGOR
JOHOR
PERAK
PULAU PINANG
PARCEL ANALYTICS DASHBOARD


GEO ANALYSIS
Highlight
Service Provider
Total Courier Items by Destination Success Postcode
Total Courier Items by Service Provider
Delivery Performance
65
3,356,080,197
SUCCESS DELIVERY PERFORMANCE
83.92%
(Within D+3)



The dashboard is more than a reporting tool. By consolidating parcel traffic data into a single view, it reduces manual effort, improves efficiency and supports decisions based on evidence rather than assumption. In a market where margins and speeds matter, those advantages are increasingly valuable.

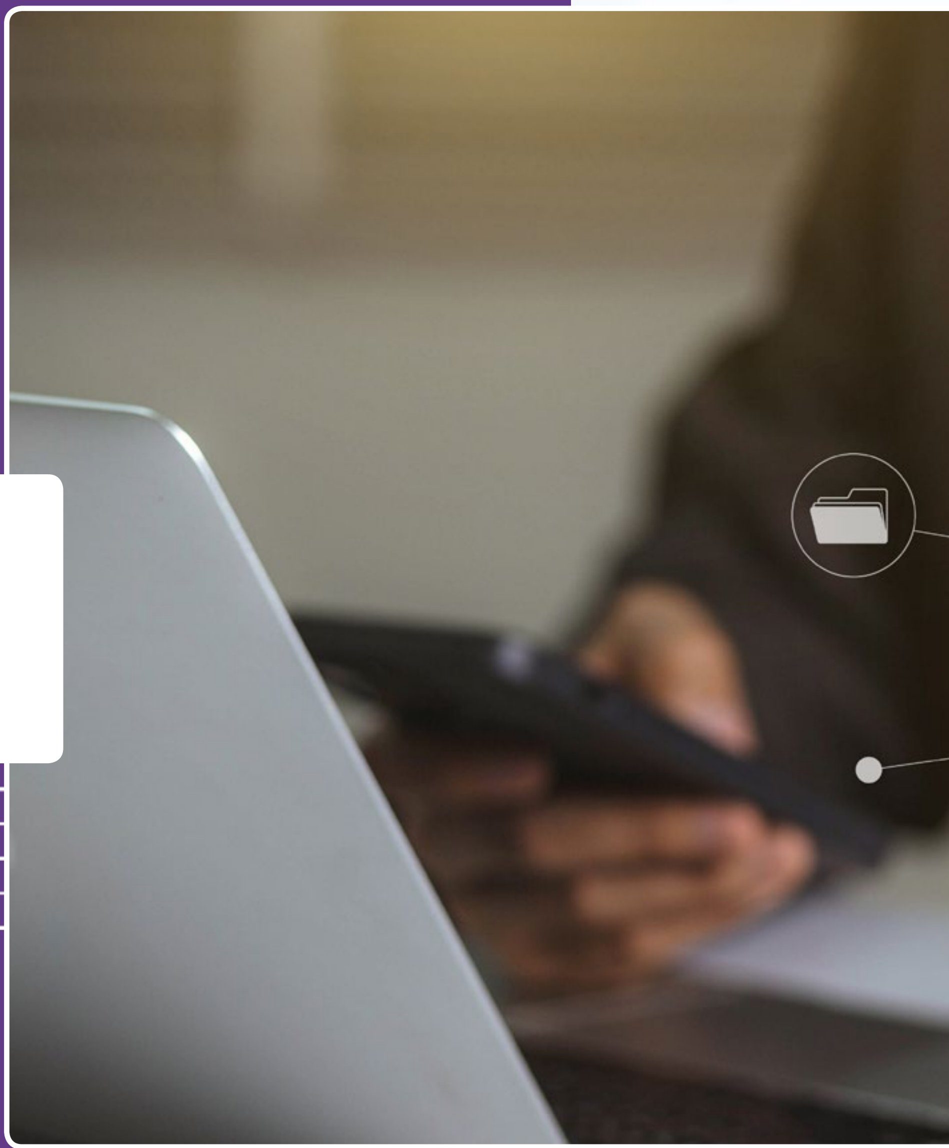
With the dataset expanding each month, the dashboard is fast evolving into a reliable measure of sector trends. Its growing depth reflects rising demand and a more dynamic courier industry in Malaysia, while also signalling opportunities for innovation, competition and service improvement. Far from being a static reporting tool, it has become a living reflection of an industry on the move.

PARCEL ANALYTICS DASHBOARD IN DESKTOP AND MOBILE VIEW

Chapter 7:

QUALITY OF SERVICE

This chapter outlines the key elements essential to ensuring the quality of service provision in the C&M industry. These include the management of consumer complaints, resolution of non-compliance issues by licensees, assessment of broadband service experience, development of industry codes and guidelines, and inter-agency collaboration to address customer-related matters. It also highlights the key activities undertaken by designated Industry Self-Regulating Forums and reports on the quality of service delivered by licensees in accordance with the Mandatory Standards for Quality of Service under the CMA 1998.



KEY HIGHLIGHTS 2024

NO. OF COMPLAINTS

Total number of complaints received in 2024

58,258

▼ 26%
(2023: 78,754)

COMPLAINTS BY SERVICES

Types of Services

Telecommunications
47%

New Media
36%

Postal & Courier
14%

Broadcasting
2%

Subsidiary Matters
1%

COMPLAINTS RESOLUTION

94%

of the total complaints have been resolved and closed

6%

of complaints are still under investigation and are being processed by both service providers and MCMC

PART A: CONSUMER PROTECTION AND COMPLIANCE RELATED ACTIVITIES

CONSUMER PROTECTION AND EMPOWERMENT

Consumer protection is a fundamental component of the regulatory framework governing the C&M industry. As the regulatory authority, MCMC is committed to safeguarding consumer rights by providing effective mechanisms for complaint handling and dispute resolution. Complaints related to telecommunications, broadcasting, postal and courier services, online content, and other areas under MCMC's jurisdiction are managed and monitored proactively.

Each complaint is addressed with appropriate resolutions within a stipulated timeframe, in accordance with the Communications and Multimedia Act 1998 (CMA 1998), the Postal Services Act 2012 (PSA 2012), the General Consumer Code of Practice 2022 (GCC 2022), the Malaysian Communications and Multimedia Content Code 2022 (Content Code 2022), and other relevant regulatory instruments (collectively referred to as "the relevant legislation and regulatory instruments").

To support this mandate, MCMC offers multiple accessible channels for complaint submission, including the Consumer Redress Portal (CRP), email, WhatsApp, a dedicated complaints hotline, and walk-in services at MCMC offices nationwide. These platforms help enhance consumer access to redress mechanisms and support the timely and effective resolution of issues within the C&M industry.

To further strengthen consumer protection and promote a more transparent, fair, and accountable C&M ecosystem, several key initiatives were undertaken in 2024 to safeguard consumers' rights. These initiatives are outlined below as part of ongoing efforts to enhance regulatory oversight and consumer empowerment.

Biannual Complaint Performance Report 2024

This report assesses the efficiency of complaint management, levels of compliance and the corrective actions undertaken by service providers to enhance service quality and proactively address emerging consumer concerns. Non-compliance with the stipulated requirements by the service providers may result in enforcement action under Section 242 of the CMA 1998, which provides for penalties of up to RM 100,000 in fines, imprisonment for up to two years, or both.

Integrated Complaint Management System 2.0 (ICMS 2.0)

ICMS 2.0 is an internal platform designed to streamline complaint handling and resolution processes within the telecommunications, postal, and courier sectors. The complaint screening system embedded in ICMS 2.0 has significantly improved the process by filtering cases received, resulting in a consistent decline in total complaint records for two consecutive years since its launch in June 2023. As of 31 December 2024, statistics show a 26% decrease in complaints, with 78,754 complaints recorded in 2023 compared to 58,258 in 2024.

Review of Consumer Guidelines to Address Emerging Issues

a. Development of a New Sub-Code under the General Consumer Code of Practice 2022 (GCC 2022)

In Q4 2024, MCMC initiated the development of a new sub-code under the GCC 2022, focusing on service subscription processes, including opt-in and opt-out mechanisms, as mandated by the Minister of Communications on 2 May 2023. This sub-code aims to enhance clarity and strengthen consumer protection when engaging with service providers through improvements in the processes.

b. Official Malay Translation of the General Consumer Code of Practice 2022 (GCC 2022)

MCMC, in collaboration with the Communications and Multimedia Consumer Forum of Malaysia (CFM), introduced an official Malay translation of the code for the purpose of broadening accessibility and improving compliance with the GCC 2022.

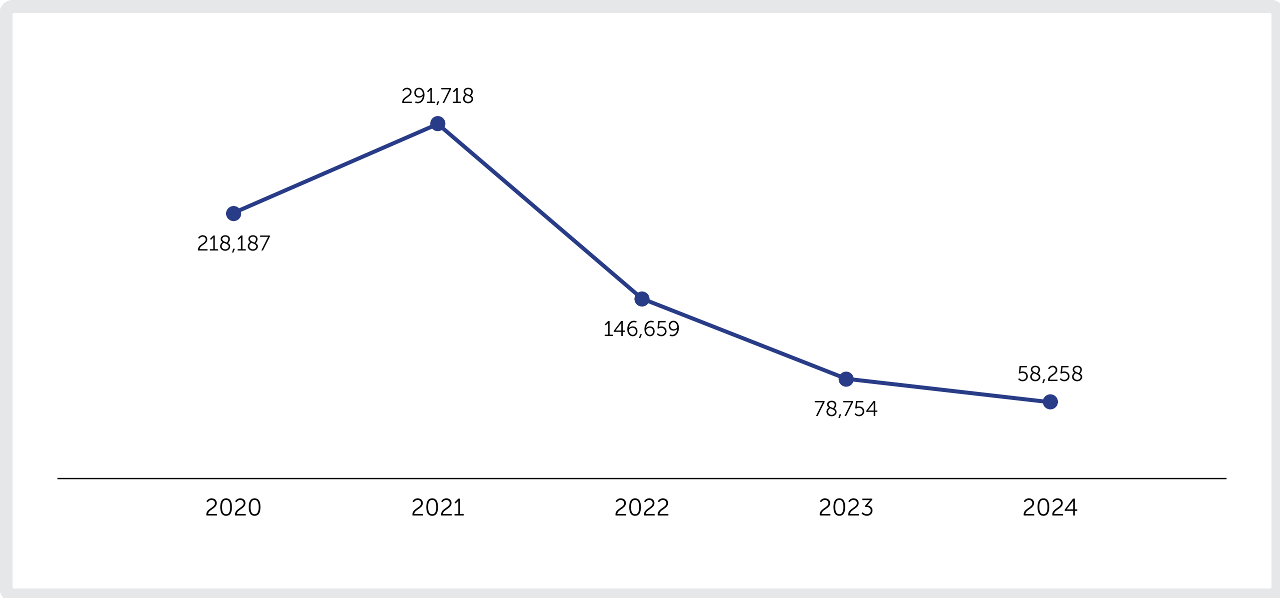
c. Comprehensive Consumer Literacy and Advocacy Programmes

MCMC, in collaboration with industry forums such as CFM and the Postal Forum, has implemented various consumer advocacy and awareness initiatives to empower consumers and uphold their rights. These initiatives also aim to promote fairness, transparency, and accountability among service providers in the C&M industry. MCMC's advocacy efforts focus on protecting and strengthening fundamental consumer rights, including the rights to safety, access to information, freedom of choice, redress, and the right to be heard. Through a comprehensive consumer literacy and advocacy plan, MCMC delivers key messages related to consumer rights and dispute resolution mechanisms across multiple platforms to reach a broad audience.

COMPLAINT STATISTICS

In 2024, MCMC received a total of 58,258 complaints across the communications and multimedia industry, marking a 26% reduction from 78,754 complaints recorded in 2023, as shown in Figure 7.1.

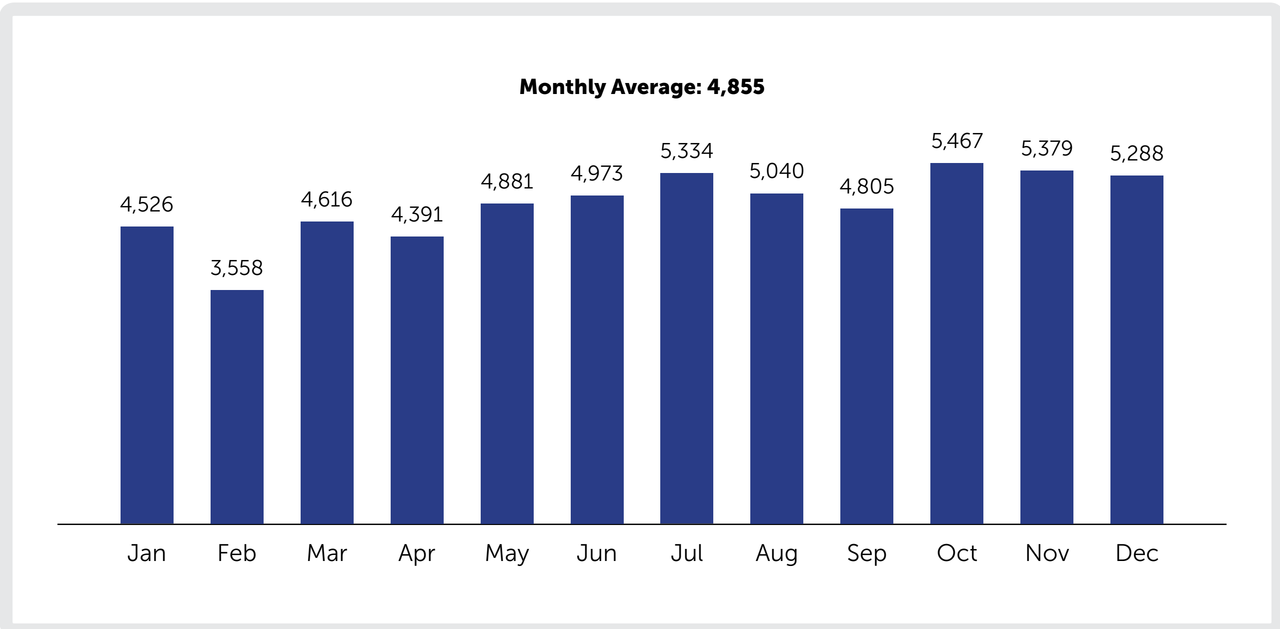
TREND OF CONSUMER COMPLAINTS RECEIVED BY MCMC 2020-2024



Source: *MCMC*
Figure 7.1: Trend of Consumer Complaints Received by MCMC 2020–2024

The average number of monthly complaints received throughout 2024 was 4,855, with October recording the highest volume at 5,467 complaints. Figure 7.2 illustrates the monthly trend of complaints received during the year.

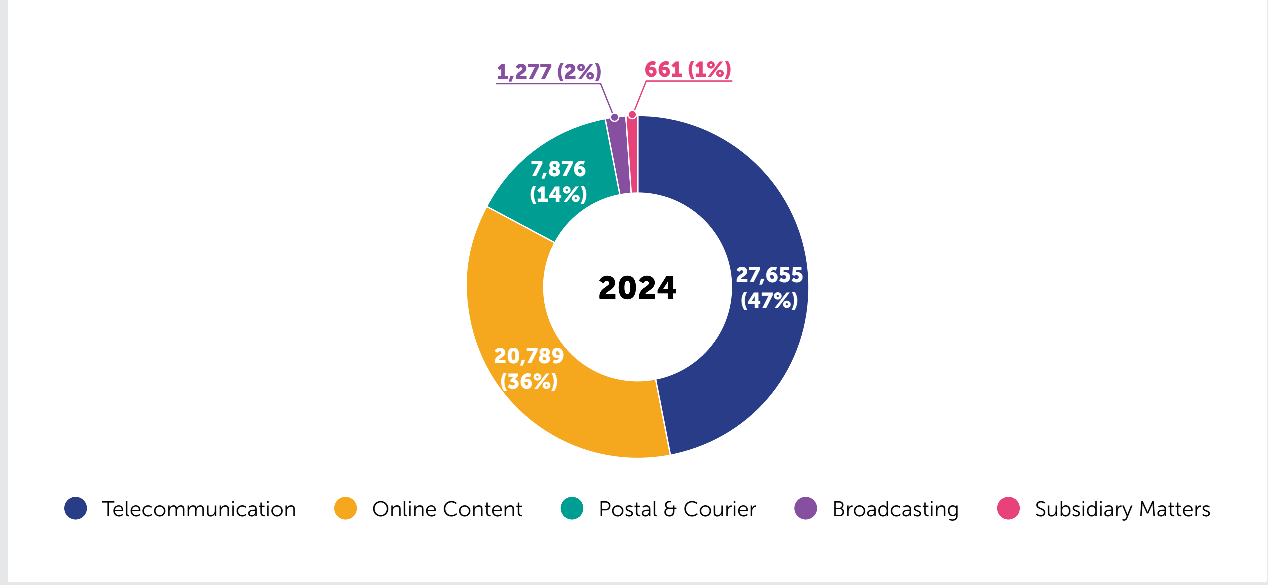
MONTHLY TREND OF COMPLAINTS RECEIVED THROUGHOUT 2024



Source: *MCMC*
Figure 7.2: Monthly Trend of Complaints Received Throughout 2024

Overall, complaints related to the telecommunications sector accounted for the highest proportion, comprising 47% of total complaints received across various sectors (Figure 7.3). This was followed by complaints related to new media (36%), postal and courier services (14%), broadcasting (2%), and MCMC subsidiary matters (1%).

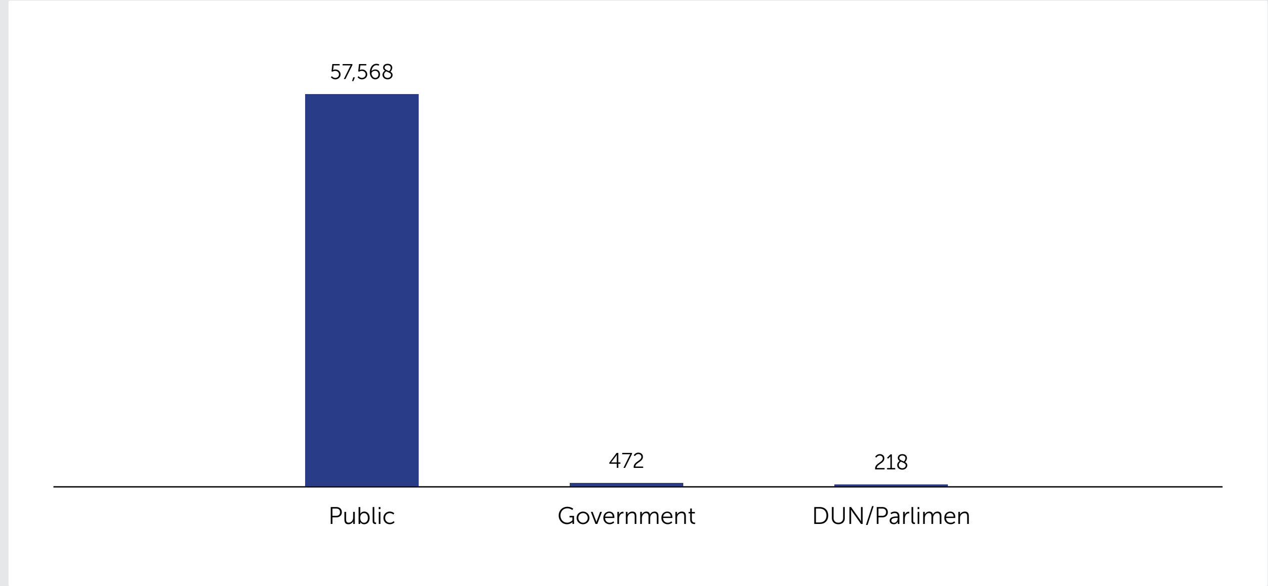
COMPLAINTS RECEIVED BY MCMC ACCORDING TO SECTOR 2024



Source: *MCMC*
Figure 7.3: *Complaints Received by MCMC According to Sector 2024*

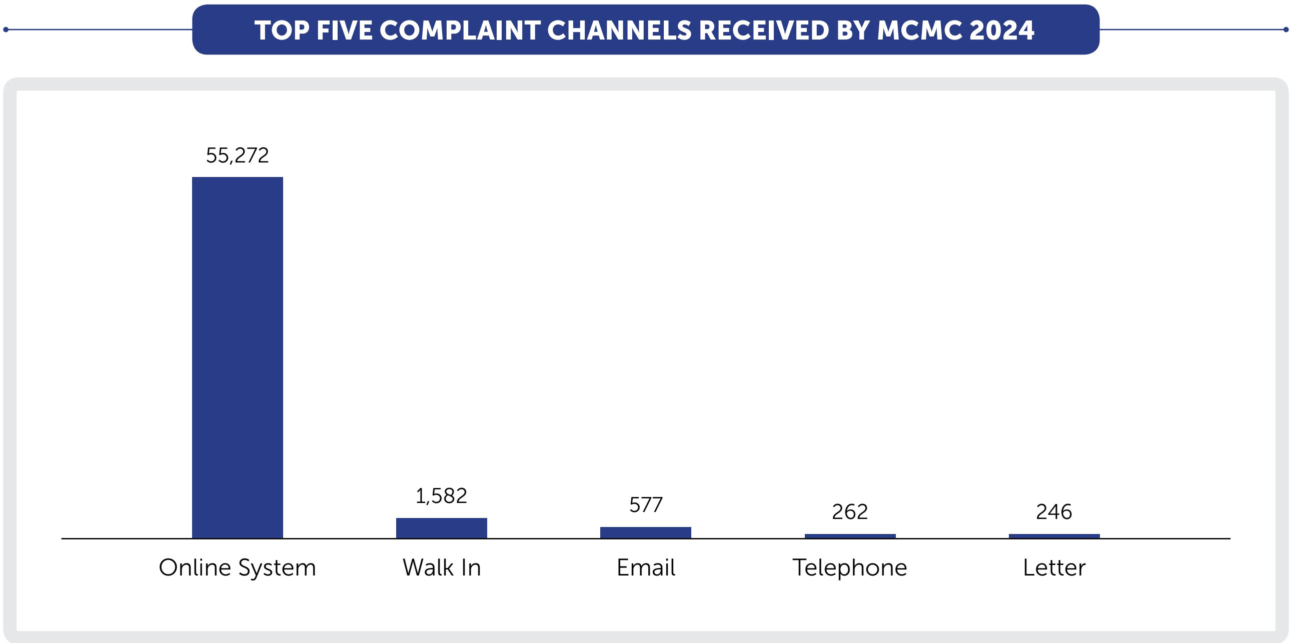
The majority of complaints, totalling 57,568 cases, were submitted by members of the public, while the remainder originated from government agencies, State Legislative Assemblies (DUN) and Parliament, as illustrated in Figure 7.4.

HIGHEST SOURCES OF COMPLAINTS RECEIVED BY MCMC 2024



Source: *MCMC*
Figure 7.4: *Highest Sources of Complaints Received by MCMC 2024*

Based on the statistics, 95% of complaints were submitted through the CRP, making it the primary channel for complaint submissions. This was followed by 3% of complaints lodged in person (walk-ins) at MCMC offices nationwide, while the remaining complaints were received via email, telephone, and postal mail or letters, as shown in Figure 7.5.



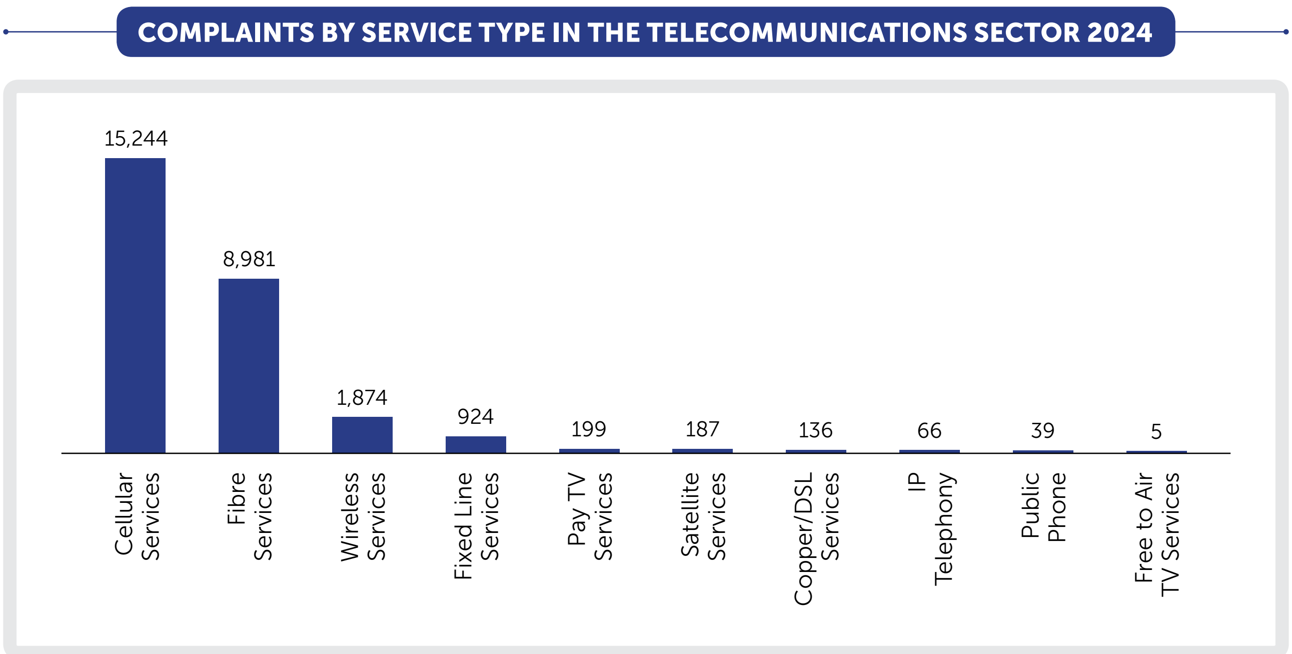
Source: MCMC
Figure 7.5: Top Five Complaint Channels Received by MCMC 2024

Complaints in the Telecommunication Sector

In 2024, the telecommunications sector received 27,655 complaints, representing a 29.26% reduction compared to 39,094 complaints reported in 2023.

Cellular service complaints remained the most frequently reported issue, accounting for 55% of total telecommunications complaints received by MCMC. Fibre service complaints made up 32%, followed by wireless broadband services (7%) and fixed-line services (3%).

The remaining 2% comprised complaints related to pay and free television services, satellite services, copper/DSL, IP telephony, and public telephones, as illustrated in Figure 7.6.



Source: MCMC
Figure 7.6: Complaints by Service Type in the Telecommunications Sector 2024

The top five complaints in the telecommunications sector were related to network issues, billing and charges, unfair practices, service delivery, and misrepresentation of services (refer to Figures 7.7 and 7.8). Network-related complaints remained the most prevalent, amounting to 12,198 cases (44%) out of the 27,655 total telecommunications complaints received in 2024.

Issues reported under network complaints included service quality, availability of 5G and 4G/LTE networks, cellular services, and high-speed broadband (HSBB). Consumers frequently reported service disruptions and unstable internet connections due to network congestion.

Other key categories contributing to telecommunications complaints included:

a. Billing and Charges

A total of 5,119 complaints (19%) were received concerning billing inaccuracies, hidden charges, and additional costs not clearly stated in the service terms and conditions.

b. Unfair Practices

3,329 complaints (12%) were related to unfair service practices, such as charges for unused services and unclear contract terms.

c. Service Delivery

2,874 complaints (10%) involved inefficiencies in service delivery, including poor customer service quality.

d. Misrepresentation of Services

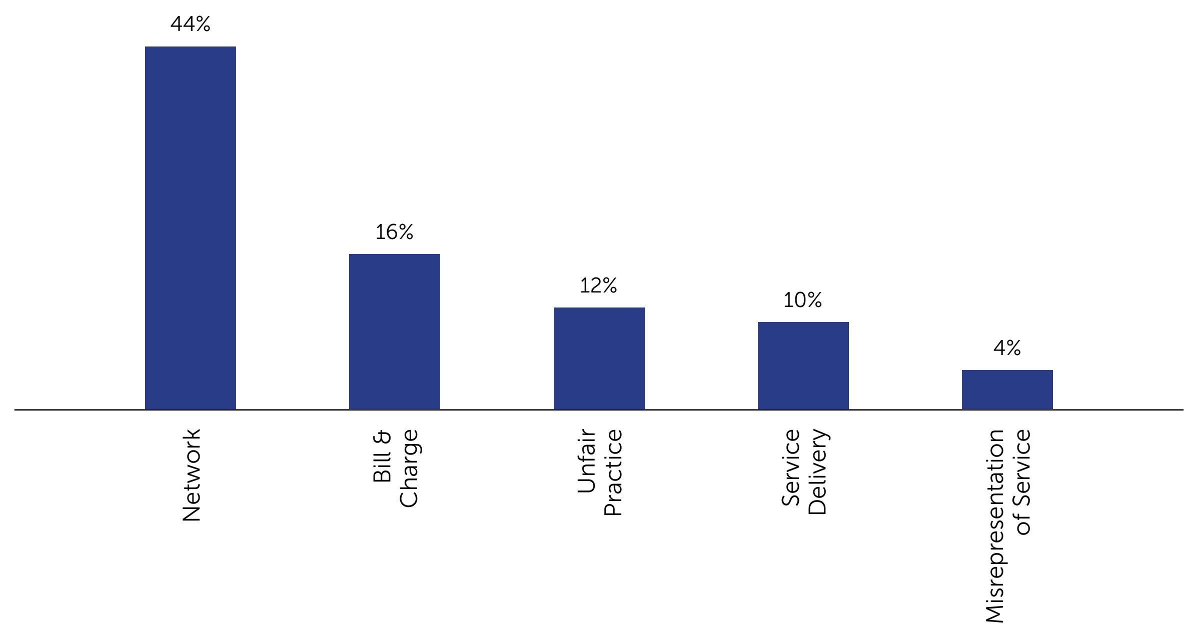
1,226 complaints (4%) involved misleading information or promotions where the actual service or product did not match the initial offering. Consumers felt misled when the promised service or product was not delivered as advertised.

COMPLAINT CATEGORIES IN THE TELECOMMUNICATIONS SECTOR 2024

Category	Total
Network	12,198
Bill & Charge	5,119
Unfair Practice	3,329
Service Delivery	2,874
Misrepresentation Of Service	1,226
MNP	934
Terms & Conditions Disputes	486
Unsolicited Activities	442
Illegal Provider	373
SMS Service	275
Pricing	247
IMEI	152
Total	**27,655**

Source: *MCMC*
Figure 7.7: *Complaint Categories in the Telecommunications Sector 2024*

TOP FIVE COMPLAINT CATEGORIES IN THE TELECOMMUNICATIONS SECTOR 2024



Source: *MCMC*
Figure 7.8: *Top Five Complaint Categories in the Telecommunications Sector 2024*

Complaints on the Postal and Courier Services

According to statistics, the postal and courier sector recorded 7,876 complaints in 2024, a significant 51% decrease compared to 16,134 complaints in 2023. This decline is attributed to regulatory oversight and industry initiatives aimed at enhancing service quality.

The top five complaint categories in the postal and courier sector are as follows and further depicted in Figure 7.9.

a. Late Delivery

A total of 3,405 complaints (43%) were related to delivery delays, primarily due to logistical issues that prevented consumers from receiving their packages on time.

b. Poor Service Delivery

1,512 complaints (19%) involved unprofessional customer service and operational inefficiencies among courier staff.

c. Customer Responsibility Issues

1,347 complaints (17%) were linked to sender-related issues, such as improper packaging or non-compliance with courier company shipping specifications.

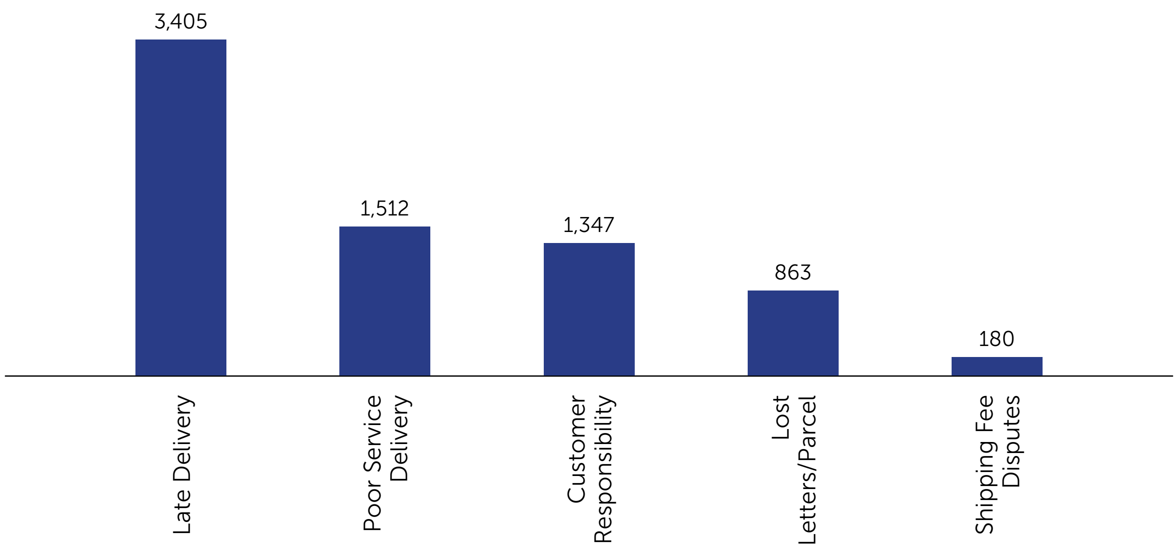
d. Lost Letters/Parcels

863 complaints (11%) were received concerning lost items during transit due to negligence in package handling by courier companies.

e. Shipping Fee Disputes

180 complaints (2%) related to pricing issues, including unexpected price increases, unfair charges, and inconsistencies in shipping costs based on location.

TOP FIVE COMPLAINT CATEGORIES IN THE POSTAL AND COURIER SERVICES 2024



Source: *MCMC*
Figure 7.9: *Top Five Complaint Categories in the Postal and Courier Services 2024*

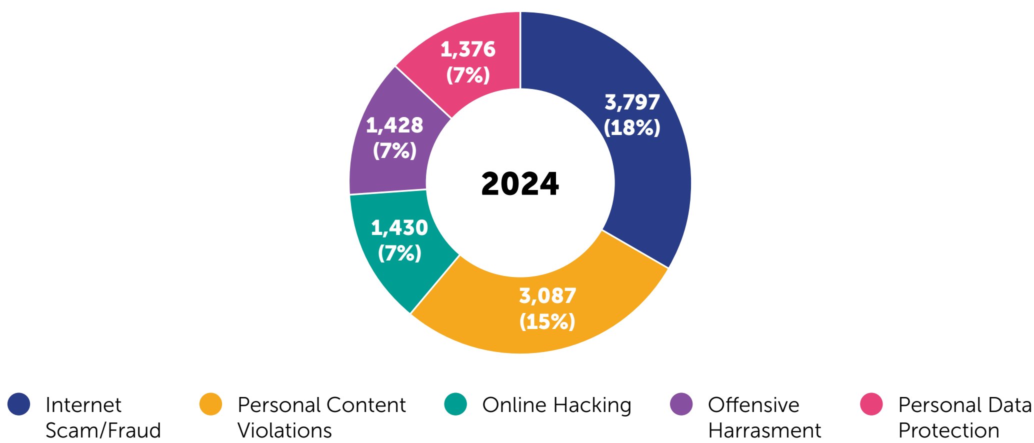
New Media Complaints

MCMC recorded 20,789 complaints related to new media content in 2024, accounting for 36% of the total 58,258 complaints received. This represents a slight decrease compared to 21,606 new media-related complaints recorded in 2023.

As illustrated in Figure 7.10, the top five complaint categories related to new media in 2024 were internet fraud (18%), personal content violations (15%), offensive harassment (7%), online hacking (7%), and personal data protection issues (7%).

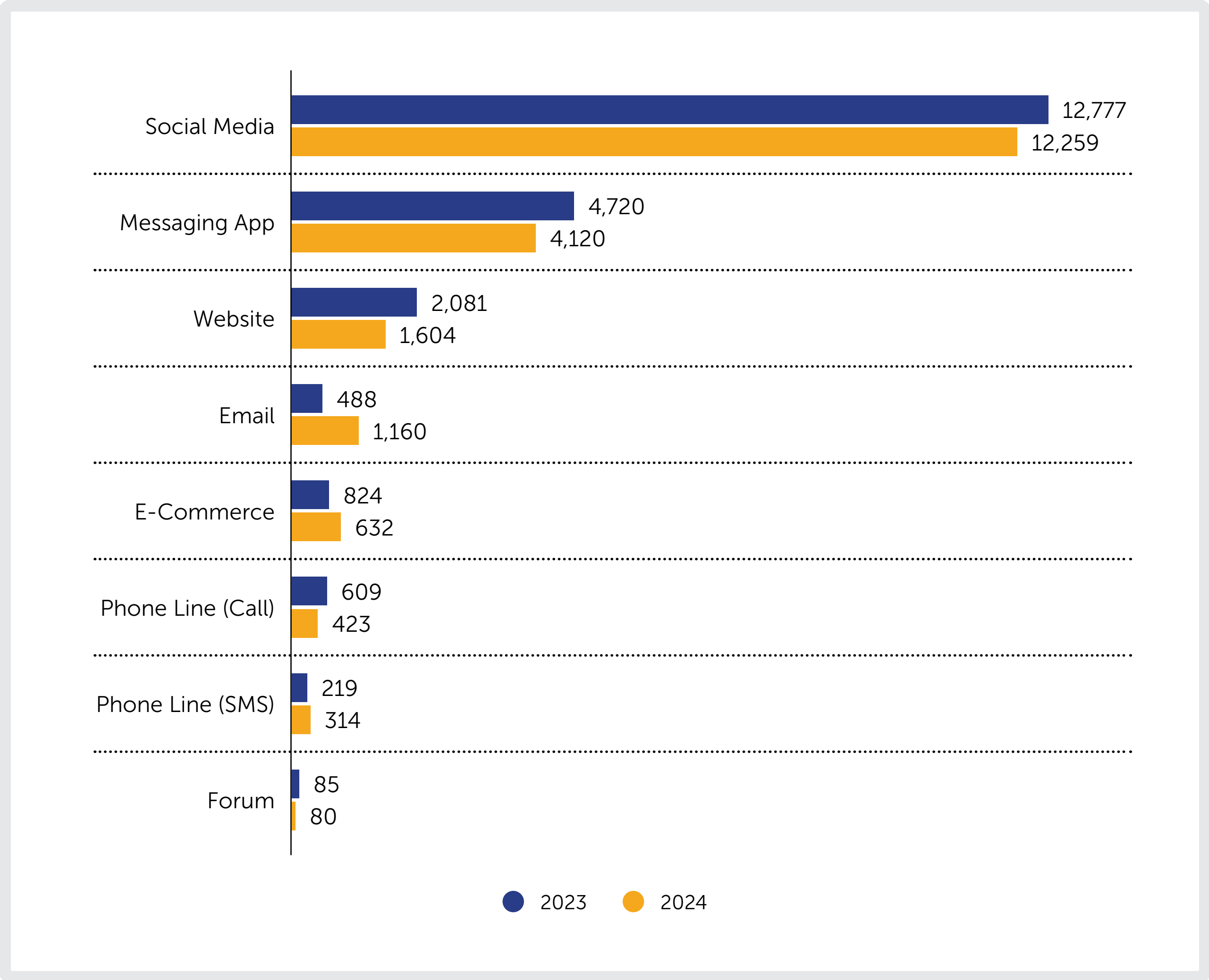
Figure 7.11 shows that 12,259 complaints were related to social media platforms, 4,120 to messaging applications, and 1,604 to websites. These figures also reflect a decline compared to 2023.

TOP FIVE NEW MEDIA COMPLAINT CATEGORIES 2024



Source: *MCMC*
Figure 7.10: *Top Five New Media Complaint Categories 2024*

NEW MEDIA COMPLAINTS BY PLATFORM TYPE 2023–2024



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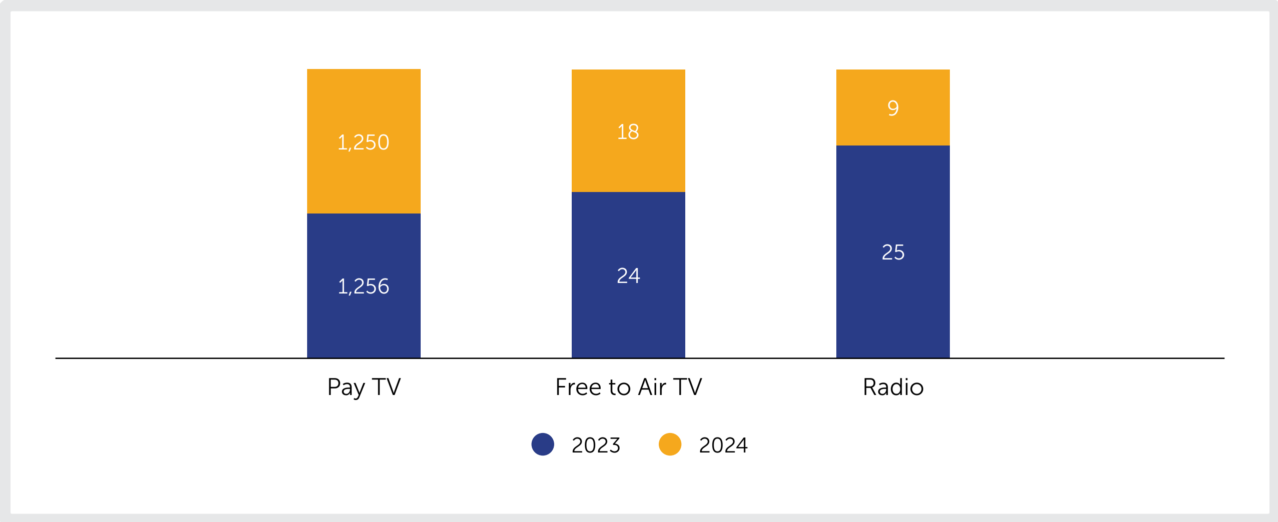
Source: *MCMC*
Figure 7.11: *New Media Complaints by Platform Type 2023–2024*

Complaints in the Broadcasting Sector

The broadcasting sector recorded 1,277 complaints in 2024, representing a 2% decrease compared to 1,305 complaints in 2023. Pay TV services accounted for 98% of the complaints, while the remainder involved free-to-air TV and radio services (see Figure 7.12).

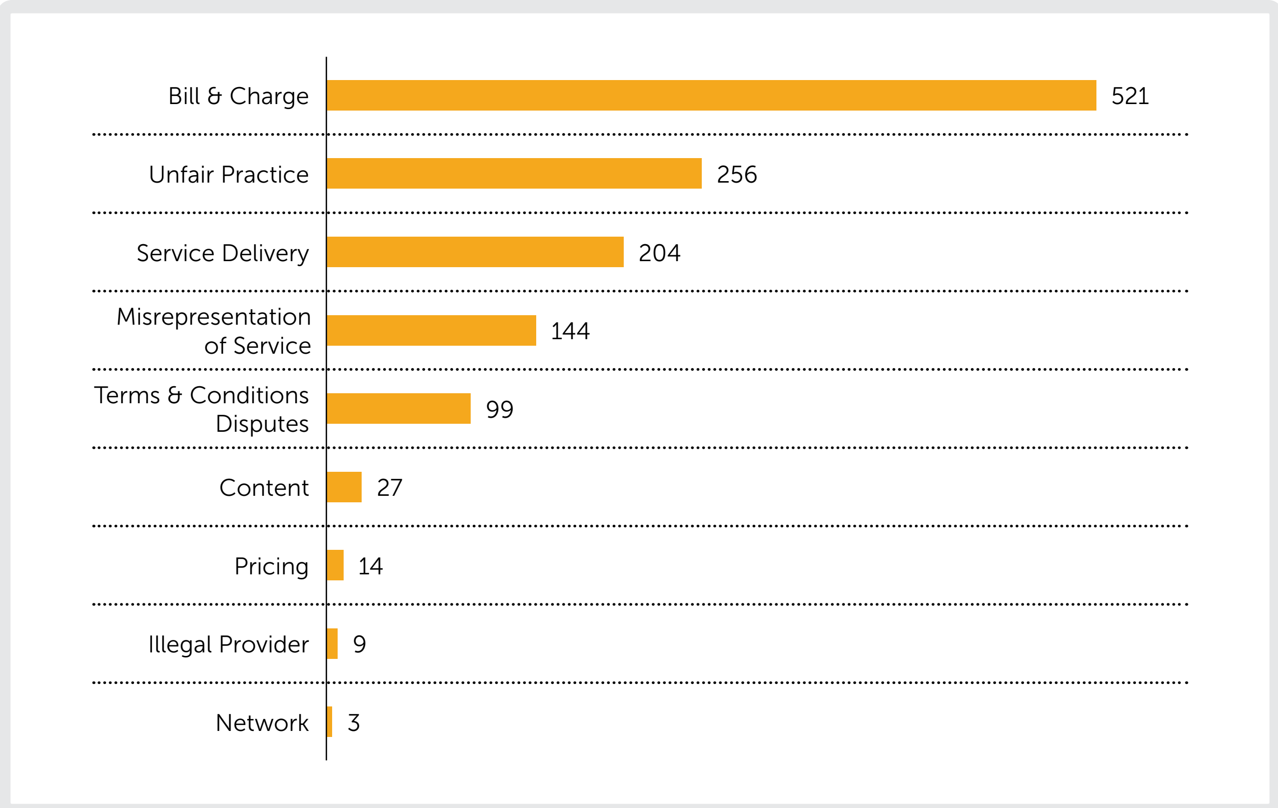
As illustrated in Figure 7.13, the top three complaint categories in 2024 were billing and charge disputes (41%), unfair practices (20%), and service delivery issues (16%).

COMPLAINTS BY SERVICE TYPE IN THE BROADCASTING SECTOR 2023–2024



Source: *MCMC*
Figure 7.12: *Complaints by Service Type in the Broadcasting Sector 2023–2024*

CATEGORIES OF COMPLAINTS IN THE BROADCASTING SECTOR 2024



Source: *MCMC*
Figure 7.13: *Categories of Complaints in the Broadcasting Sector 2024*

7

Complaints on MCMC Subsidiary Matters

Complaints related to MCMC subsidiary matters refer to public complaints received directly by MCMC, without the involvement of service providers or the industry forum. These complaints typically concern technical or administrative issues.

The three most common complaints in this category were licence inquiries (138 complaints), non-standard equipment (133 complaints), and tower service failures (103 complaints), as highlighted in Figure 7.14 below:

COMPLAINTS RELATED TO MCMC SUBSIDIARY MATTERS 2024

Types Of Services	Year 2024
License Enquiry	138
Non-Standard Equipment	133
Tower Service Failure	103
Spectrum Interference	77
Special Project By MCMC	51
Site Offer (Tower/Structure)	43
Tower Objection	37
Apparatus Assignment	25
National Information Dissemination Centre (NADI)	13
Public Phone - USP area	10
TV Parabola	10
Site Rental	10
Radiation	8
Radio Amateur	3

Source: *MCMC*
Figure 7.14: *Complaints Related to MCMC Subsidiary Matters 2024*

Complaints Not Directly Regulated by MCMC

With the rapid advancement of cyberspace technologies, MCMC continues to receive complaints related to hacking, online purchases, internet fraud, phishing, spamming, financial investments, gambling, and prostitution. While these issues fall outside MCMC's regulatory scope under the CMA 1998, MCMC provides technical support and collaborates with law enforcement agencies to combat such activities.

In 2024, the top three complaints in this category were internet fraud, which recorded the highest number of cases (3,797 complaints), followed by hacking activities (1,430 complaints) and personal data protection issues (1,376 complaints), as illustrated in Figure 7.15.

COMPLAINTS NOT DIRECTLY REGULATED BY MCMC 2024

Types Of Complaints	Year 2024
Internet Scam/Fraud	3797
Online Hacking	1430
Personal Data Protection	1376
Online Gambling	353
Online Prostitution	293
Love Scam	184
Online Purchase	180
Sextortion	98
Phishing/Pharming	20
SPAM	3
Financial/Investment	1

Source: *MCMC*
Figure 7.15: *Complaints Not Directly Regulated by MCMC 2024*

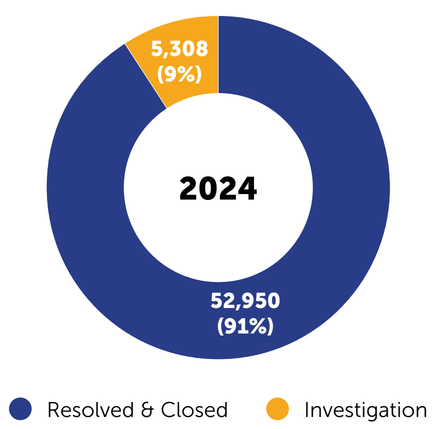
Complaints Resolution 2024

As of 31 December 2024, 91% of total complaints across all five sectors had been resolved and closed, as shown in Figure 7.16.

As part of the complaint resolution process, service providers are required to submit a resolution response for the complainant's approval. The complainant is then given five working days to provide feedback. If no response is received within this period, the complaint is closed automatically.

Meanwhile, 9% of complaints remain under investigation by service providers and MCMC.

COMPLAINTS RESOLUTION 2024



Source: *MCMC*
Figure 7.16: *Complaints Resolution 2024*

7

ADDRESSING NON-COMPLIANCE WITH THE COMMISSION DETERMINATION ON THE MANDATORY STANDARDS FOR QUALITY OF SERVICE

Licensees are required to submit quality of service (QoS) performance reports to MCMC on a quarterly or half-yearly basis, depending on the type of services provided, in accordance with the Commission Determination on the Mandatory Standards for Quality of Service (MSQoS), enforced under the CMA 1998.

Currently, the following MSQoS are applicable to existing technologies and are closely aligned with consumer-related matters, making them critical for effective service monitoring:

a.	Commission Determination on the Mandatory Standards for Quality of Service (Customer Service) – Determination No. 4 of 2021
b.	Commission Determination on the Mandatory Standards for Quality of Service (Digital Leased Line) – Determination No. 3 of 2009
c.	Commission Determination on the Mandatory Standards for Quality of Service (Public Payphone Service) – Determination No. 3 of 2003
d.	Commission Determination on the Mandatory Standards for Quality of Service (Public Switched Telephone Network) – Determination No. 1 of 2002

For the 2024 reporting period, MCMC evaluated 175 reports submitted by 46 licensees. Based on the assessment, 24 Notices of Non-Compliance were issued to 16 licensees for breaches of the minimum standards and late submissions. The list of licensees that failed to comply with the MSQoS is provided in the table below.

NON-COMPLIANCE LICENSEES

No.	Name of Licensees	Non-Compliance
1.	Celcom Berhad	• Non-billing Related Complaints • Customer Complaints Resolution Time • Response Time for Operator Service
2.	Digi Telecommunications Sdn Bhd	• Customer Complaints Resolution Time • Response Time for Operator Service
3.	PR1MA Communications Sdn Bhd	• Non-Billing Related Complaints • Service Restoration Fulfillment
4.	TM Technology Services Sdn Bhd	• Response Time for Operator Service
5.	Allo Technology Sdn Bhd	• Response Time for Operator Service
6.	Measat Broadcast Network Systems Sdn Bhd	• Response Time for Operator Service
7.	My Penang Fon Sdn Bhd	• Late Submission • Billing Related Complaints
8.	MYISP Dot Com Sdn Bhd	• Response Time for Operator Service • Late Submission
9.	Miraita Enterprise	• Late Submission • Non-submission
10.	Fiberail Sdn Bhd	• Late Submission
11.	Helogang Sdn Bhd	• Late Submission
12.	Kopen Telecommunication Sdn Bhd	• Non-submission
13.	Parso Network Vending Supply	• Non-submission
14.	The 786 Legacy Empire	• Non-submission
15.	Navitel Sdn Bhd	• Late Submission
16.	Uqaill Teguh Enterprise	• Late Submission

Source: *MCMC*
Figure 7.17: *Non-Compliance Licensees*

Subsequently, a total of 15 First Information Reports (FIRs) were submitted for further enforcement action, as outlined below.

NUMBER OF FIR SUBMISSIONS FOR ENFORCEMENT ACTIONS

No.	Name of Licensees	Total FIR
1.	Celcom Berhad	2
2.	Digi Telecommunications Sdn Bhd	2
3.	PR1MA Communications Sdn Bhd	3
4.	TM Technology Services Sdn Bhd	1
5.	Allo Technology Sdn Bhd	1
6.	Measat Broadcast Network Systems Sdn Bhd	1
7.	My Penang Fon Sdn Bhd	1
8.	MYISP Dot Com Sdn Bhd	1
9.	Miraita Enterprise	1
10.	Navitel Sdn Bhd	1
11.	Uqaill Teguh Enterprise	1
Total		**15**

Source: *MCMC*
Figure 7.18: *Number of FIR Submissions for Enforcement Actions*

Enforcement of Prepaid Registration Compliance Through Mystery Shopper Audits

Pursuant to subparagraph 2.4 of the Guidelines on Registration of End-Users of Prepaid Public Cellular Services (MCMC/G/01/17) (Guidelines), dated 1 June 2017, licensees and their dealers are prohibited from selling pre-activated SIM cards to end-users. To assess compliance with these requirements, MCMC conducted a series of Mystery Shopper Audits from 16 July to 6 September 2024.

The 2024 Mystery Shopper Audit exercise covered 225 locations across five regions. Figure 7.19 below summarises the compliance results by region, highlighting the number of compliant and non-compliant dealers:

COMPLIANCE RESULTS BY REGION

No.	Location	Total Areas Covered	No. of Shops Audited	No. of Compliant	No. of Non-Compliant
1.	Central Region	26	128	117	11
2.	Southern Region	34	102	99	3
3.	Eastern Region	70	134	134	0
4.	Northern Region	95	218	214	4
Total		**225**	**582**	**564**	**18**

Source: *MCMC*
Figure 7.19: *Compliance Results by Region*

Based on the audit findings, MCMC has raised a total of 18 FIRs against the respective licensees for breaches under Section 242 of the CMA 1998 and the Ministerial Declaration on Standard Conditions for Application Service Provider Class Licence (Declaration No. 32 of 2006) (Standard Licence Conditions).

Notably, a breach of the Standard Licence Conditions constitutes an offence under Section 127 (Compliance with Licence Conditions) and Section 242 (General Offence and Penalty) of the CMA 1998. Offenders are liable to a fine not exceeding RM 100,000, imprisonment for a term not exceeding two years, or both.

MCMC continues to undertake regular monitoring and enforcement activities to ensure compliance with the Prepaid Registration Guidelines by licensees and their dealers.

Engagement and Consultation Sessions for the Review of Policy and Regulatory Instruments

MCMC is currently reviewing its regulatory instruments to ensure that existing standards remain relevant and aligned with evolving industry requirements.

To support this effort, MCMC conducted a series of engagement and consultation sessions with the public and stakeholders. These sessions focused on performance standards from both consumer and licensee perspectives, as well as the technical aspects of the services provided.

The table below outlines the engagement and consultation sessions held for the review of the Mandatory Standards for Quality of Service for Digital Leased Line (MSQoS DLL) and the revised Guidelines on Registration of End-Users of Prepaid Public Cellular Services:

ENGAGEMENT SESSIONS CONDUCTED BY MCMC

Engagement Session/Workshop	Details	Objective
Digital Leased Line Services	**10 October 2024:** Preliminary Engagement and Consultation Session **26 participants**	To gather the latest insights and feedback from the public and stakeholders regarding the MSQoS DLL, DLL services, focusing on performance standards, consumer, and technical perspectives.
	28 October 2024: Engagement Session with Enterprise Customers and Service Providers **24 participants**	To discuss feedback from the questionnaire related to the MSQoS DLL.
The Revised Guidelines on Registration of End-Users of Prepaid Public Cellular Services	**16 and 17 May 2024:** Workshop to Finalise the Revised Guidelines on Registration of End-Users of Prepaid Public Cellular Services **26 participants**	To discuss the proposed provisions in the Guidelines and gather industry feedback.
	12 December 2024: Public Engagement Session to Finalise the Revised Guidelines on Registration of End-Users of Prepaid Public Cellular Services **32 participants**	The session fostered inclusive and comprehensive discussions on the revised Guidelines.

Source: *MCMC*
Figure 7.20: *Engagement Sessions Conducted by MCMC*

Other key initiatives undertaken include the development of the Next Generation Malaysian Emergency Response Service 999 and the digitalisation of MCMC's monitoring, compliance, and enforcement activities. In addition, MCMC introduced the Service Disruption Dashboard Portal and the Compliance Watch Portal, and coordinated licensee incentives under *Pakej RAHMAH* to support the programmes.

Source: *MCMC*
Figure 7.21: *Preliminary Engagement and Consultation Session*

Source: *MCMC*
Figure 7.22: *Public Engagement Session to Finalise the Revised Guidelines on Registration of End-Users of Prepaid Public Cellular Service*

ASSESSMENT ON QUALITY OF SERVICE

The Mandatory Standards for Quality of Service (MSQoS) is a regulatory framework established by MCMC to ensure that consumers in Malaysia receive high-quality telecommunications services, including cellular voice, mobile broadband, and fixed broadband. By setting specific performance standards and metrics, MCMC aims to safeguard consumer interests, prevent substandard service quality, and promote a competitive and efficient telecommunications market.

From January to December 2024, MCMC conducted an annual network performance audit covering public cellular voice, mobile broadband, and fixed broadband services. The performance of all service providers was evaluated based on the standards and parameters set out in the MSQoS.

Wireless Broadband Access Service

Mobile broadband services continue to experience significant growth, marked by a sharp increase in data traffic. This trend is largely driven by the growing number of mobile users, particularly smartphone users, who rely on these services for communication, education, transactions, entertainment, and more. To keep pace with evolving user demand and technological developments, MCMC revised the MSQoS for Wireless Broadband Access Services (Wireless BAS), with the updated standards coming into effect on 1 April 2024.

These revised standards reflect MCMC's continued commitment to ensuring that consumers across Malaysia have access to reliable, high-quality broadband services. They also serve to encourage service providers to invest in network enhancements and service innovation.

Figure 7.23 provides a summary of the Key Quality Indicators specified in the MSQoS, which are used to assess both the quality of service and the overall user experience.

KEY QUALITY INDICATORS FOR WIRELESS BROADBAND ACCESS SERVICE

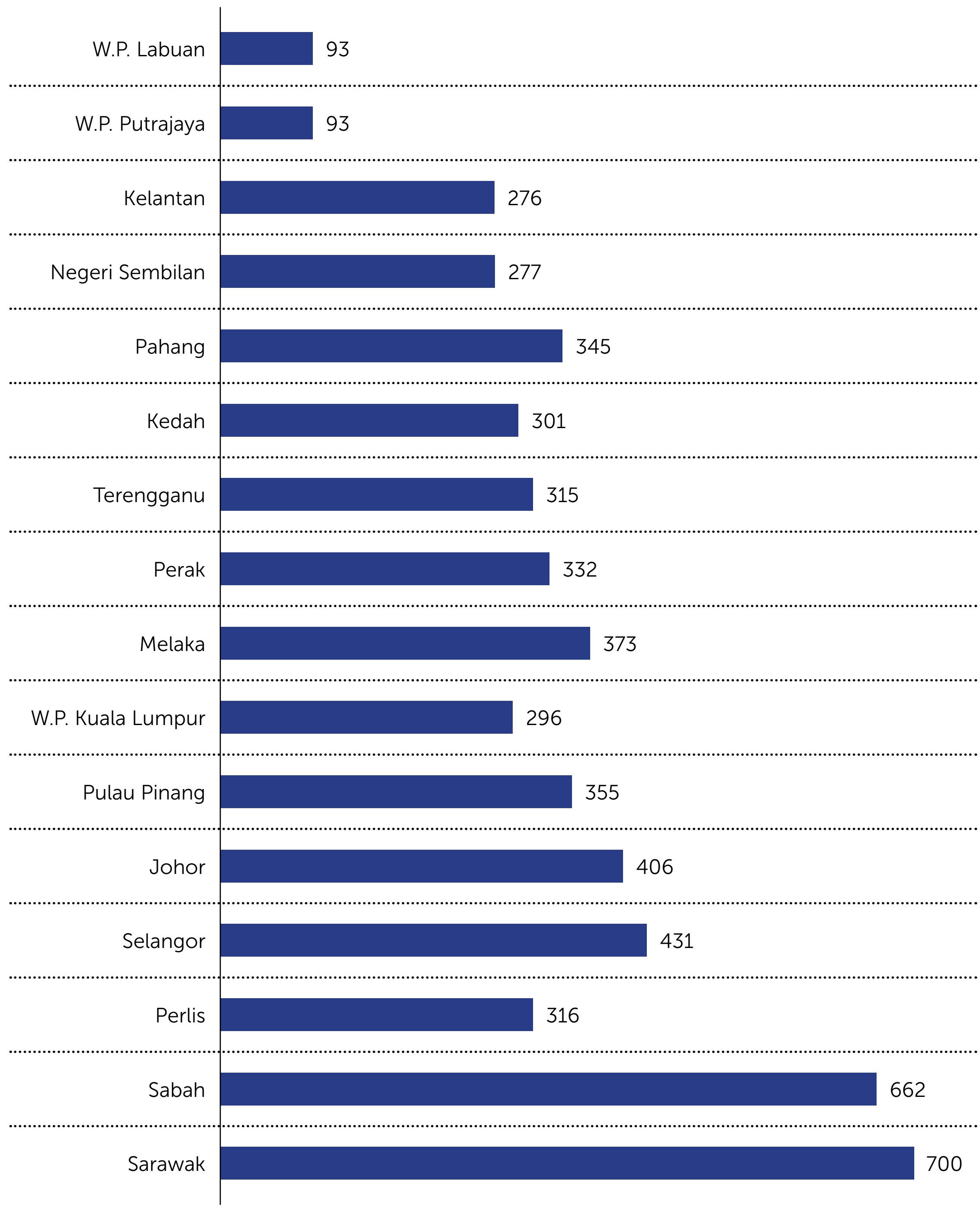
No.	Key Quality Indicator	4G & 5G	5G SWN
1.	Download Throughput	≥ 7.7Mbps (2024) ≥ 10Mbps (2025)	≥ 100Mbps
2.	Upload Throughput	≥ 1.0Mbps (2024) ≥ 1.3Mbps (2025)	≥ 3Mbps (NSA[1]) ≥ 5Mbps (SA[2])
3.	Network Latency	≤ 100ms	≤ 40ms
4.	Packet Loss	≤ 0.5%	≤ 0.25%
5.	Web Browsing	≤ 5 sec	≤ 5 sec
6.	Video Streaming	≤ 6 sec	≤ 6 sec
7.	Service Accessibility	≥ 90%	≥ 90%

Source: *MCMC*
Figure 7.23: *Key Quality Indicators for Wireless Broadband Access Service*

[1] *Non-standalone (NSA).*
[2] *Standalone (SA).*

As of 31 December 2024, a total of 5,571 locations have been audited nationwide for Wireless BAS. Figure 7.24 presents the breakdown of audited locations by state.

TOTAL LOCATION BY STATE

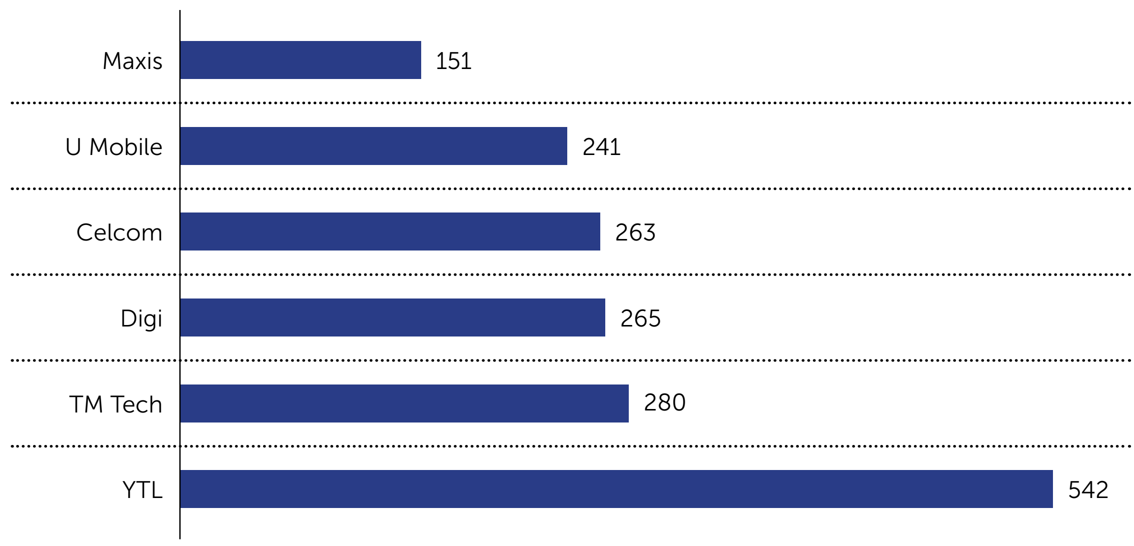


Source: *MCMC*
Figure 7.24: *Number of Locations Audited for Wireless Broadband Access Service*

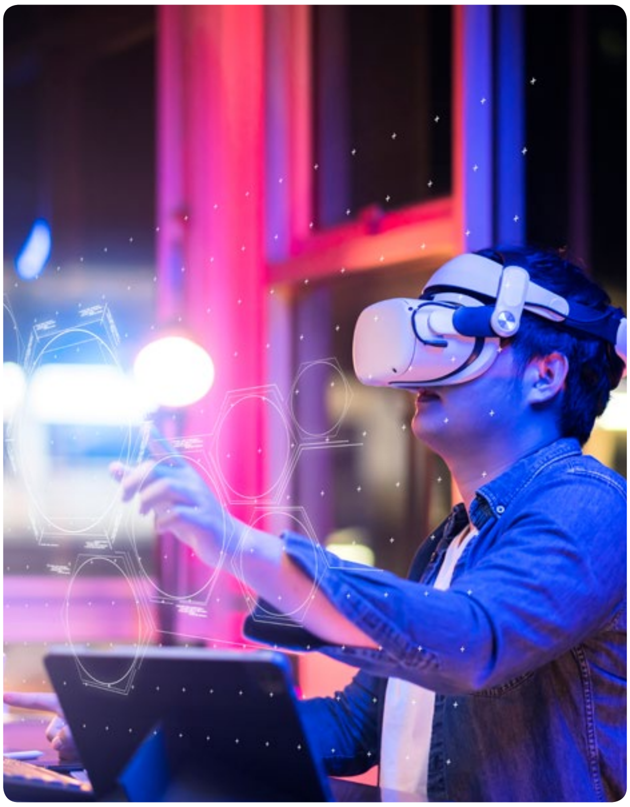
Based on the outcomes of the audit activities, a total of 83 warning letters and 198 notices under Subsection 51(2) of the CMA 1998 were issued to service providers for non-compliance with the MSQoS for Wireless Broadband Access Services, Determination No. 2 of 2021 and Determination No. 2 of 2023.

The audit identified a total of 1,742 instances of non-compliance across 1,010 locations nationwide. As of 31 December 2024, 502 cases have been resolved by the respective service providers, 134 cases have been issued with Commission Directions, and 1,106 cases remain under evaluation for potential issuance of Commission Directions. A summary of non-compliance cases by service provider is presented in Figure 7.25 below:

SUMMARY OF NON-COMPLIANCES FOR WIRELESS BROADBAND ACCESS SERVICE



Source: *MCMC*
Figure 7.25: *Summary of Non-Compliances for Wireless Broadband Access Service*



Public Cellular Service

Public cellular services remain essential and relevant, even as connectivity trends shift increasingly towards data usage. Since 2023, MCMC observed a rising trend in dropped calls as 5G coverage continued to expand.

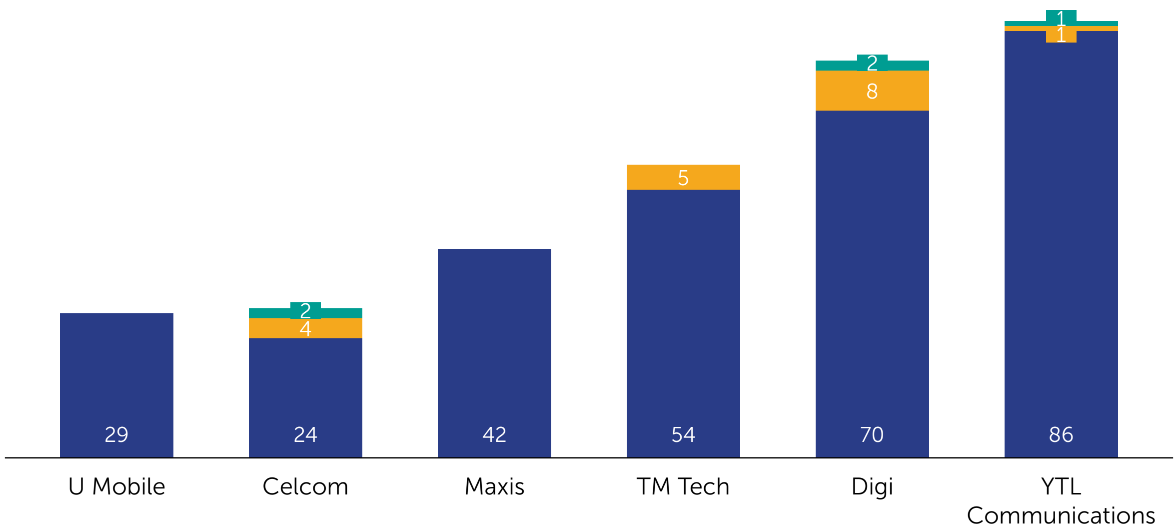
To address handover failures between neighbouring sites of Digital Nasional Berhad (DNB)'s LTE 700 MHz frequency band and other Mobile Network Operators' (MNOs) 4G networks, which contributed to dropped calls, MCMC initiated the activation of the Call Re-Establishment (CRE) feature in the 5G network at the end of December 2023. The network-wide implementation of CRE has successfully resolved the issue.

To further demonstrate the effectiveness of the solution, MCMC organised drive test measurement programmes with the YB Minister (YBM), the Ministry of Communications, and MNOs across several states in the first half of 2024.

Source: MCMC
Figure 7.26: *Drive Test Measurement Conducted with YBM, the Ministry, MCMC, and MNOs on 9 January 2024*

In conjunction with these efforts, it is imperative to assess the network's performance in terms of voice call accessibility and retainability, to ensure compliance with the minimum requirements outlined in the MSQoS. For public cellular services, performance is evaluated based on the Call Setup Success Rate (CSSR) and Dropped Call Rate (CDR), as defined in the MSQoS. A summary of the non-compliances identified nationwide is presented in Figure 7.27.

SUMMARY OF NON-COMPLIANCES FOR PUBLIC CELLULAR SERVICE



Source: MCMC
Figure 7.27: *Summary of Non-Compliances for Public Cellular Service*

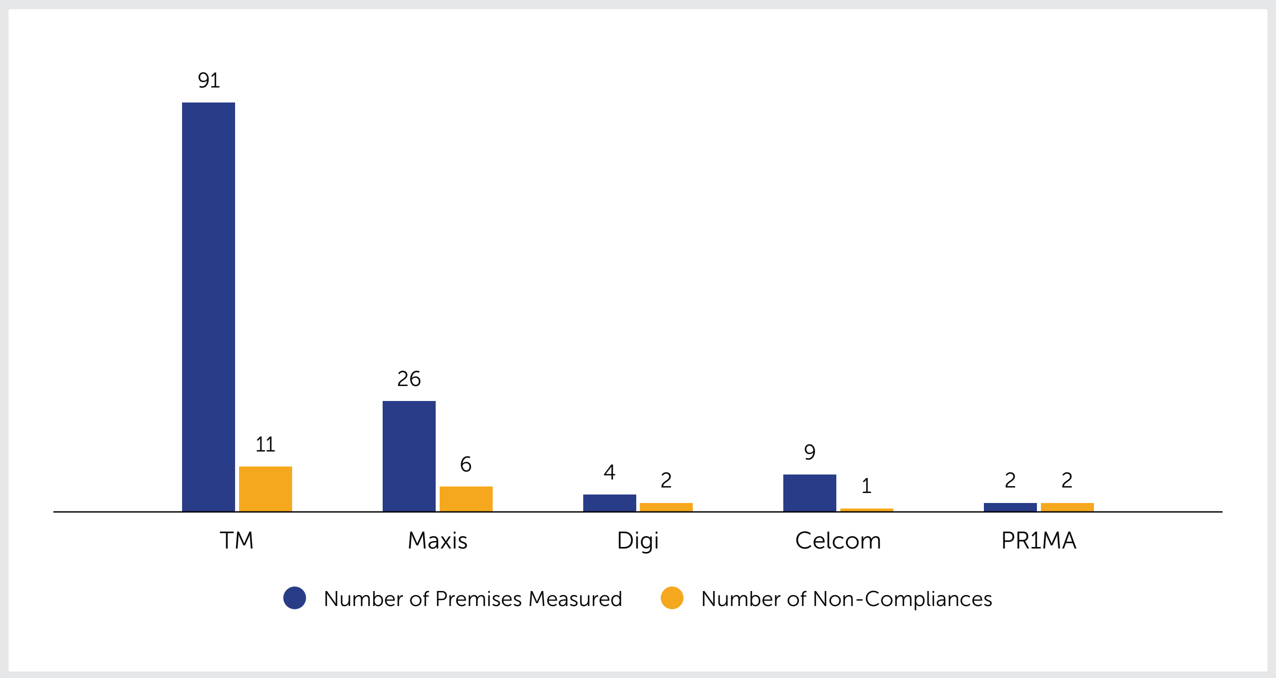
Based on the outcome of the audit activities, a total of 18 notices under Subsection 51(2) of the CMA 1998 were issued to MNOs for non-compliance with the Commission Determination on the MSQoS for Public Cellular Service, Determination No. 3 of 2021. As of 31 December 2024, 305 cases have been resolved by the MNOs, while five cases remain pending.

Wired Broadband Access Service

For wired broadband access services, MCMC assesses the QoS for home internet subscriptions involving both fibre and Digital Subscriber Line (DSL) connections. Measurements are conducted through direct connections to Customer Premise Equipment (CPE) or routers at the premises to evaluate the actual service received against the subscribed broadband package.

As of December 2024, MCMC conducted service quality audits at 138 premises nationwide. A summary of the non-compliances identified is presented in Figure 8.28.

NUMBER OF PREMISES MEASURED AND NON-COMPLIANCES IDENTIFIED FOR WIRED BROADBAND ACCESS SERVICE



Source: *MCMC*
Figure 7.28: *Number of Premises Measured and Non-Compliances Identified for Wired Broadband Access Service*

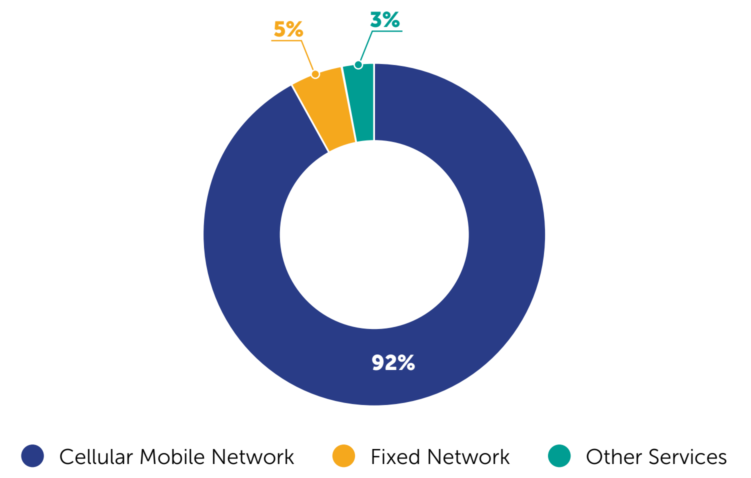
A total of 21 non-compliances were successfully resolved through proactive actions by service providers, such as the replacement of CPE devices at customers' premises. However, one non-compliance case remains under resolution by the service provider as of 31 December 2024.

Fibre connections, as the last-mile access, offer significantly higher bandwidth and lower latency compared to DSL. Under the JENDELA initiative, MCMC is working to deliver gigabit-level connections to premises across Malaysia. To achieve this, service providers are progressively transitioning from DSL to fibre networks to enhance overall performance. This initiative aims to meet the growing consumer demand for faster and more reliable internet speeds.

SPECTRUM MONITORING AND INTERFERENCE RESOLUTION

In 2024, a total of 62 cases of Radio Frequency Interference (RFI) were reported across various services and frequency bands ranging from 100 MHz to 14 GHz. Cellular mobile network services once again accounted for the majority of these cases, representing approximately 92% of all reported incidents. Figure 8.29 presents the breakdown of RFI cases by service type.

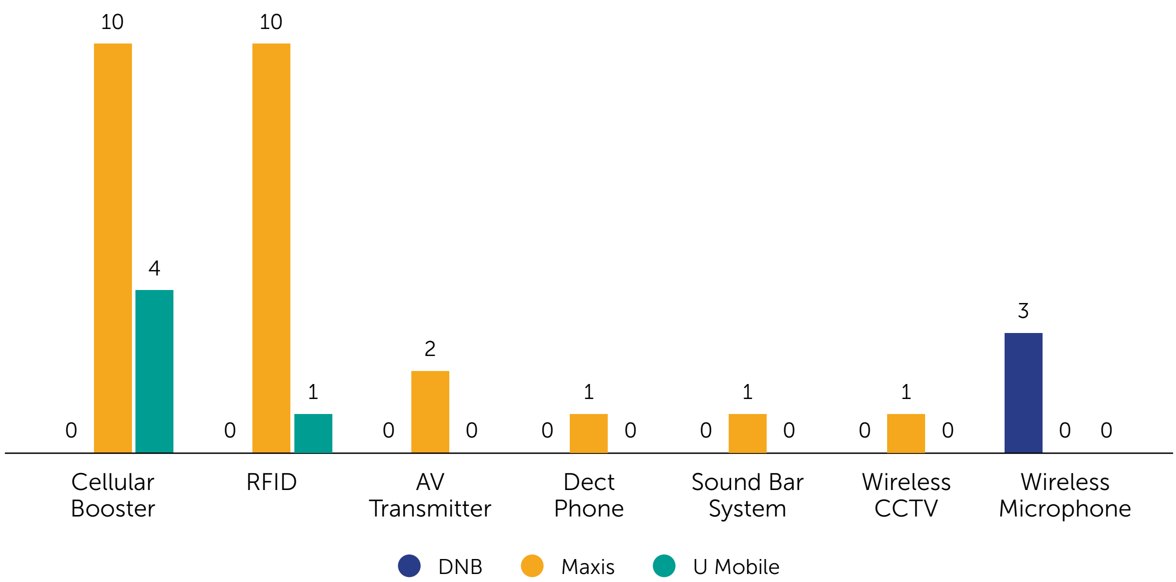
NUMBER OF RFI CASES BY SERVICE TYPE



Source: *MCMC*
Figure 7.29: *Number of RFI Cases by Service Type*

Non-standard equipment continued to be the primary source of interference, contributing to 33 out of the 62 cases. Figure 7.30 illustrates the number of RFI cases involving non-standard equipment, along with the affected licensees.

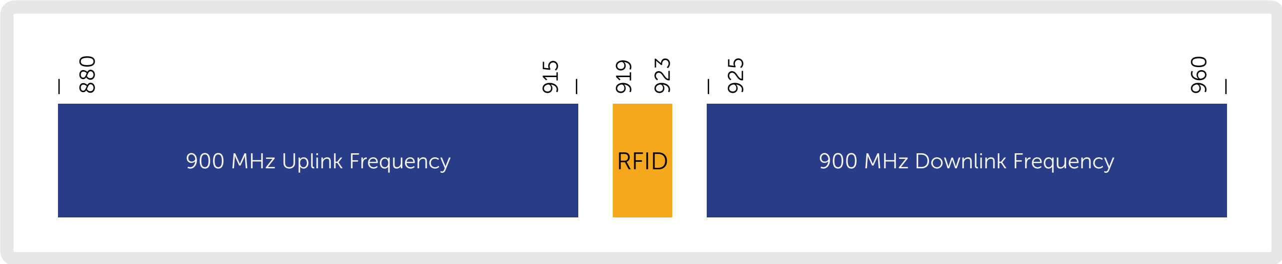
RFI CASES BY DEVICE TYPE



Source: *MCMC*
Figure 7.30: *Number of RFI Cases by Device Type*

Specifically, non-standard cellular boosters were responsible for 14 RFI cases, while 11 cases involved non-standard Radio Frequency Identification (RFID) devices. In Malaysia, RFID operations are limited to the 919–923 MHz frequency band, as shown in Figure 8.31.

SPECTRUM ALLOCATION FOR RFID IN MALAYSIA



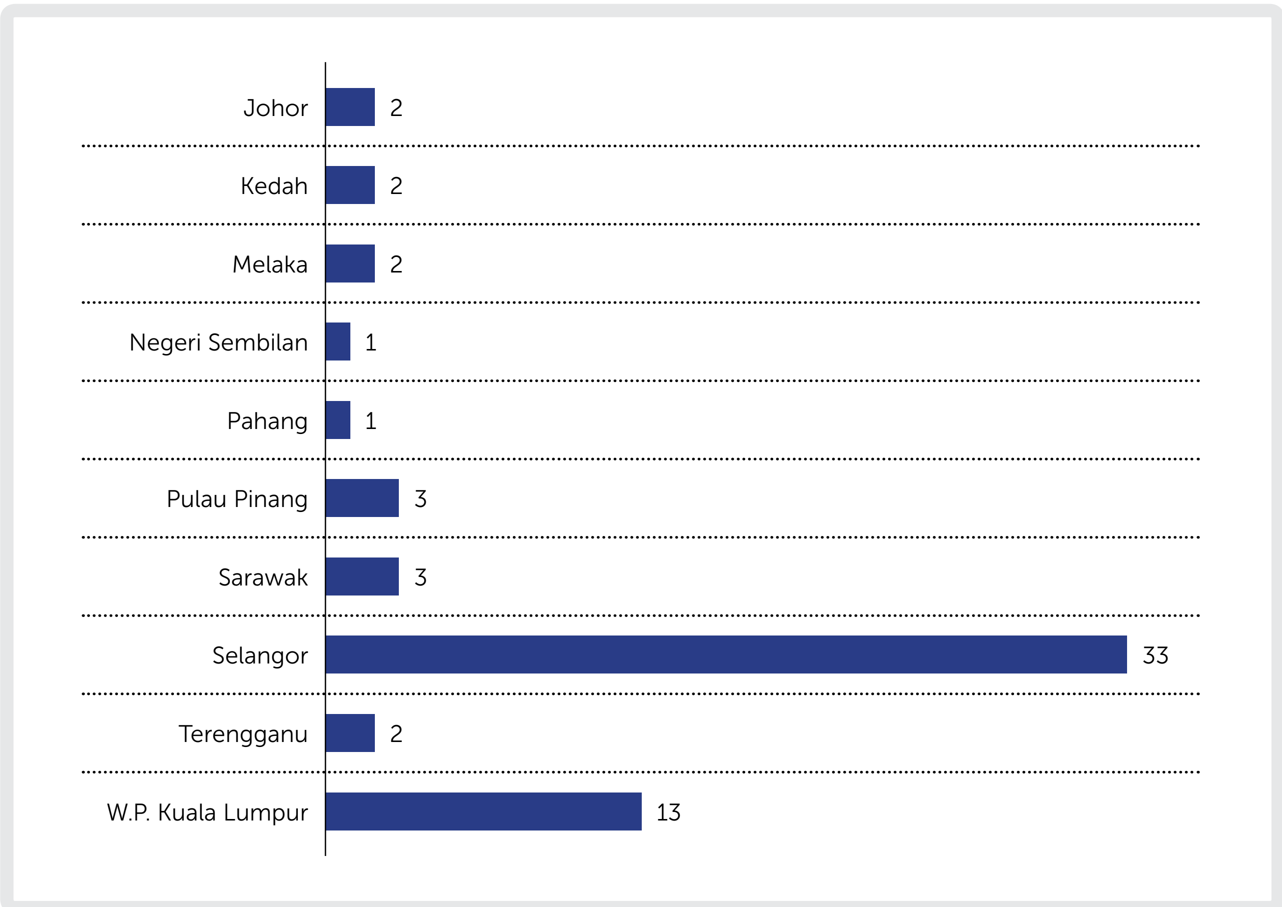
Source: *MCMC*
Figure 7.31: *Spectrum Allocation for RFID in Malaysia*

Signal transmissions from non-standard RFID devices have interfered with adjacent frequencies used by cellular mobile networks, significantly affecting service quality and user experience.

Additional RFI incidents reported in 2024 were attributed to other types of non-standard equipment, including AV transmitters, DECT phones, wireless CCTV cameras, and wireless microphones, which collectively accounted for seven cases. In this regard, the public is strongly advised against purchasing or using communication equipment that does not bear an MCMC certification label, as such devices are classified as non-standard and may cause harmful interference.

The highest number of RFI cases was recorded in Selangor (33), followed by Wilayah Persekutuan Kuala Lumpur (13). Penang and Sarawak each reported three cases. Figure 8.32 provides the state-level distribution of RFI cases in 2024.

RFI CASES BY STATE



Source: *MCMC*
Figure 7.32: *Number of RFI Cases by State*

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In addition to investigating and resolving spectrum interference, MCMC also conducted extensive spectrum monitoring activities within the 100 MHz to 18 GHz frequency range. This range covers a variety of services, including cellular mobile communications, microwave stations, and satellite communications.

Spectrum monitoring is crucial for detecting the use of frequencies without valid assignments and for ensuring that licensees comply with spectrum regulations. By identifying unauthorised transmissions and unassigned frequency usage, MCMC helps maintain a clear and interference-free spectrum environment that supports legitimate operations.

In 2024, MCMC identified two instances of spectrum usage without valid assignments from a total of 57 monitoring activities, and these cases are being addressed accordingly.

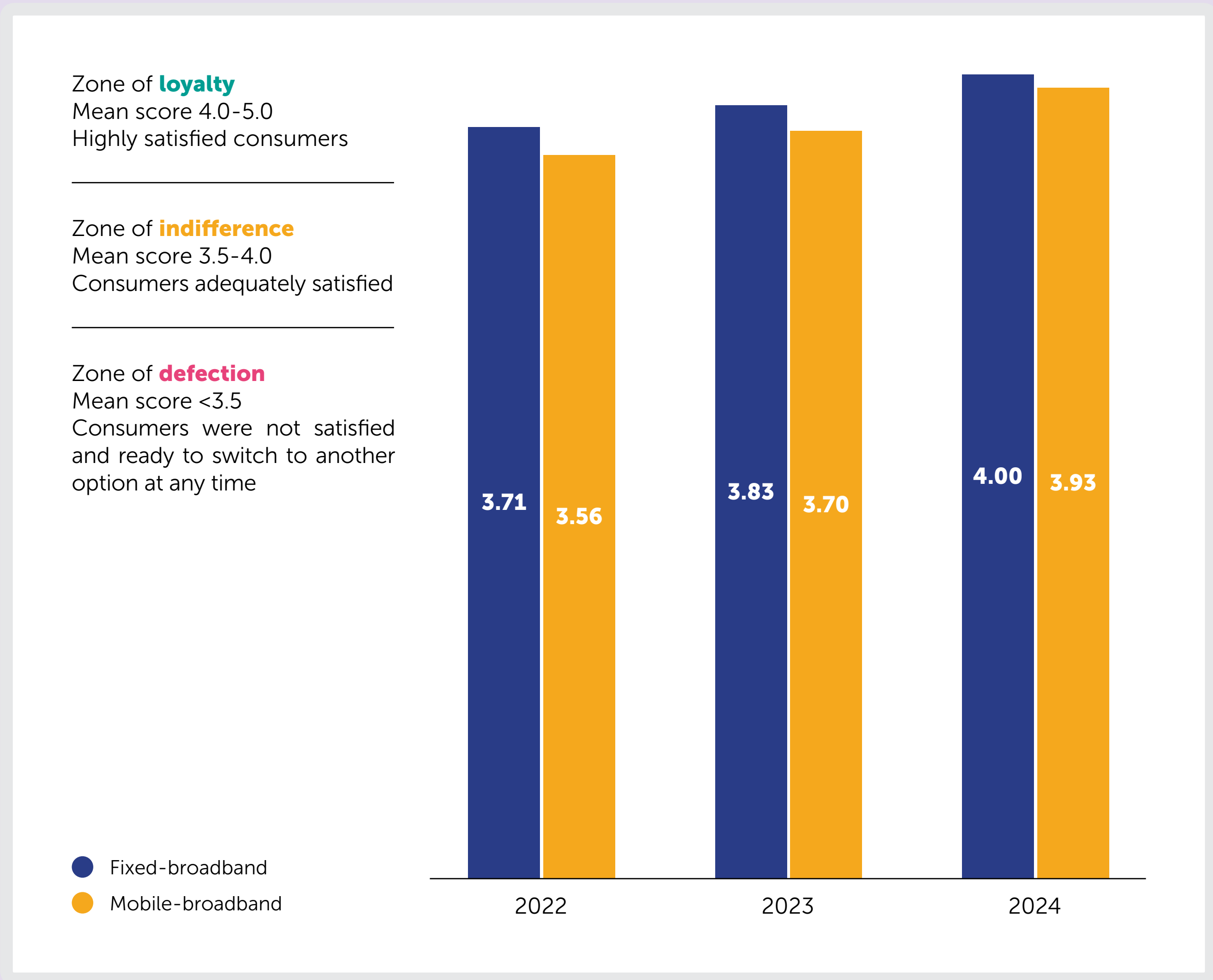
MCMC BROADBAND QUALITY OF EXPERIENCE SURVEY 2024

The Broadband Quality of Experience Survey 2024 (BQoES 2024) is the fourth edition of the annual survey commissioned by the Malaysian Communications and Multimedia Commission (MCMC). Its primary objective is to evaluate customer satisfaction regarding broadband quality of experience. The survey examines five key online activities: video streaming, web browsing, online gaming, online voice calls and online video calls. Additionally, it compares performance across different broadband technologies, including fixed broadband (FBB) and mobile broadband (MBB).

The data was collected through MCMC secure online portal as well as Computer Assisted Telephone Interview (CATI) from September until December 2024. The survey reached 3,456 respondents from six mobile-broadband and three fixed-broadband service providers. The survey results were evaluated using the Customer Satisfaction Index (CSI) based on a 5-likert scale analysis comprising consumers' expectations on services and service providers' performance. The results were then categorised into three types of zones, as shown in Figure 7.33.

The survey results showed that overall CSI for FBB and MBB were at 4.00 and 3.93, respectively. The score implied that FBB consumers were highly satisfied with the services provided by their service providers, while MBB consumers were adequately satisfied. In comparison with 2023, FBB CSI score increased by 0.17 while MBB increased by 0.23.

CSI CORRESPONDENCE INTERPRETATION AND CSI SCORES OF BQOES 2022-2024



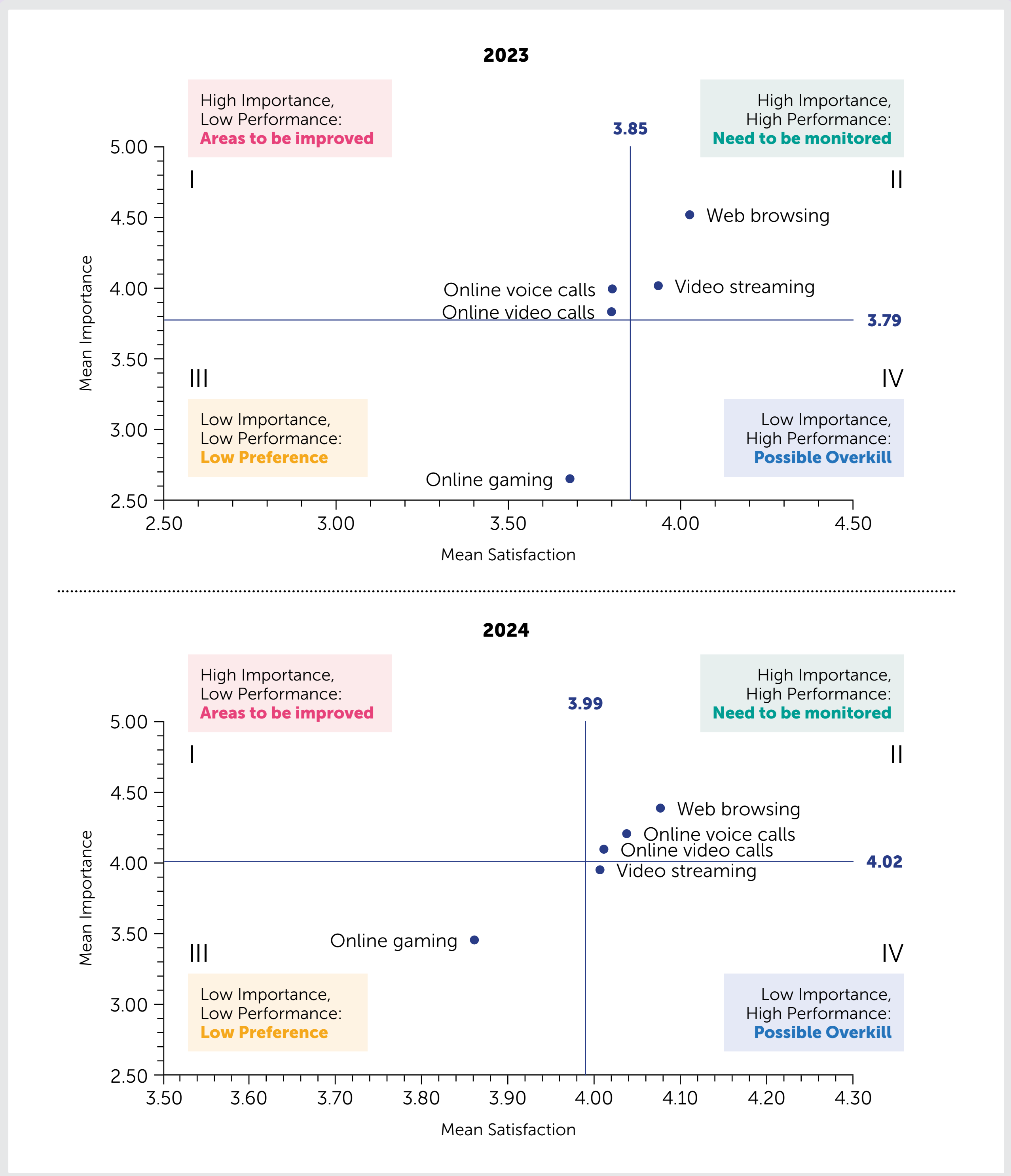
Source: *MCMC*
Figure 7.33: *CSI Correspondence Interpretation and CSI Scores of BQoES 2022-2024*

When asked about dissatisfaction with the services, broadband consumers listed the following issues according to the respective online activities (top three) as follows:

SCOPE	TOP THREE ISSUES
Video streaming	• Video stalls and buffers • Video slow to load/start • Low picture quality
Web browsing	• Waiting for page to load • Slow download from webpage • Webpage does not display smoothly
Online gaming	• Latency • Animation stuttering • Low frame rate
Online voice call	• Choppy • Dropped call • Cannot hear the other person
Online video call	• Frozen or disconnected video • Choppy or broken voice • Low video quality

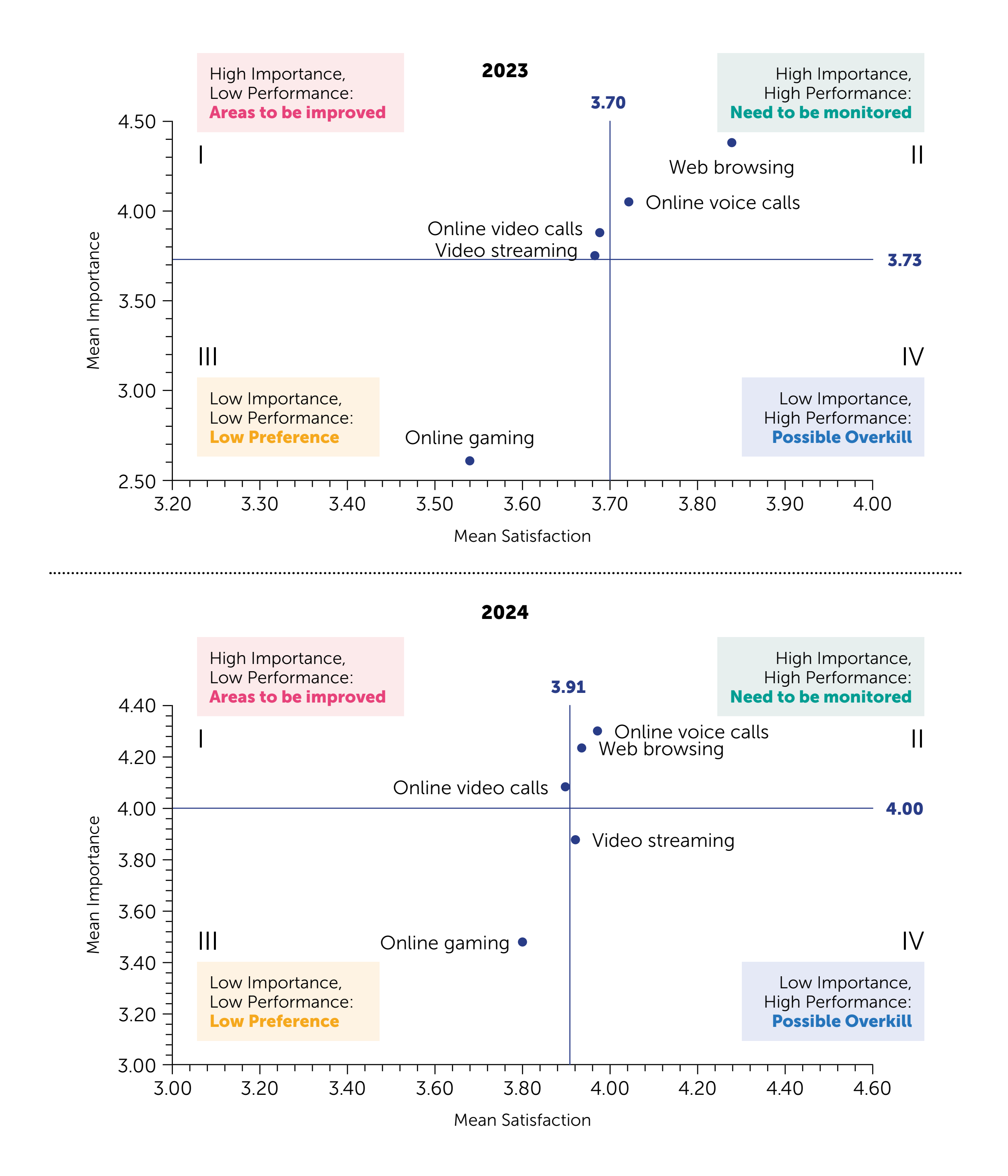
The survey used the Importance-Performance Matrix to identify areas of improvement based on the CSI score for both FBB (Figure 7.34) and MBB (Figure 7.35). For FBB, online voice calls and online video calls successfully improved their performance to gain a position from Quadrant I in 2023 to Quadrant II in 2024. Meanwhile, for MBB, web browsing and online voice calls continue to improve its score to maintain the performance as above average in Quadrant II. Hence, these scopes need to be monitored accordingly to sustain performance and customers satisfaction.

IMPORTANT-PERFORMANCE MATRIX FOR FBB, 2023-2024



Source: *MCMC*
Figure 7.34: *Important-Performance Matrix for FBB, 2023-2024*

IMPORTANT-PERFORMANCE MATRIX FOR MBB, 2023-2024



Source: *MCMC*
Figure 7.35: *Important-Performance Matrix for MBB, 2023-2024*

Over the past three years, Malaysia's broadband landscape has seen consistent and measurable improvements in consumer experience, driven by strategic collaboration between MCMC and service providers. These efforts have contributed to notable advancements in service delivery and increased customer satisfaction. Sustaining this momentum will require continued emphasis on network reliability, service speed, and the quality of customer support. These elements are critical for both fixed and mobile broadband services to foster long-term customer loyalty, reduce churn and strengthen consumer confidence and satisfaction.

PART B: COMMUNICATION REGULATIONS AND INDUSTRY VOLUNTARY FORUMS

Consistent enforcement of existing regulations has enabled both the authorities and the industry to uphold consumer confidence and trust, an essential foundation for the sector's continued growth. Regulatory measures also play a key role in ensuring that vulnerable groups, such as low-income households and persons with disabilities, are not excluded from accessing essential communication services.

In parallel with regulatory efforts, designated voluntary forums serve as important mechanisms for promoting service quality. These industry forums, designated by MCMC, provide platforms for stakeholders in the communications and multimedia sector to collaborate on key issues and share best practices. They foster self-regulation among industry players, enabling them to address emerging challenges and improve service quality without the need for direct enforcement.

ENHANCING THE MANDATORY STANDARDS FOR QUALITY OF SERVICE FOR TELECOMMUNICATION SERVICES

One of MCMC's key regulatory functions is to monitor and enforce minimum quality standards for telecommunication services, including public cellular (voice), wired broadband (fixed), and wireless broadband (mobile) services. These standards are established through the Commission Determination on Mandatory Standards for Quality of Service (MSQoS), which sets the performance benchmarks that service providers must meet to ensure consumers receive reliable service quality and experience.

In response to the emergence of 5G technology and growing user demand, MCMC conducted a review of the MSQoS for Wireless Broadband Access Service. The revised standards came into effect in the second quarter of 2024. This revision aims to improve quality benchmarks for the existing 4G (LTE) network and introduces new standards specifically for the 5G Single Wholesale Network (SWN).

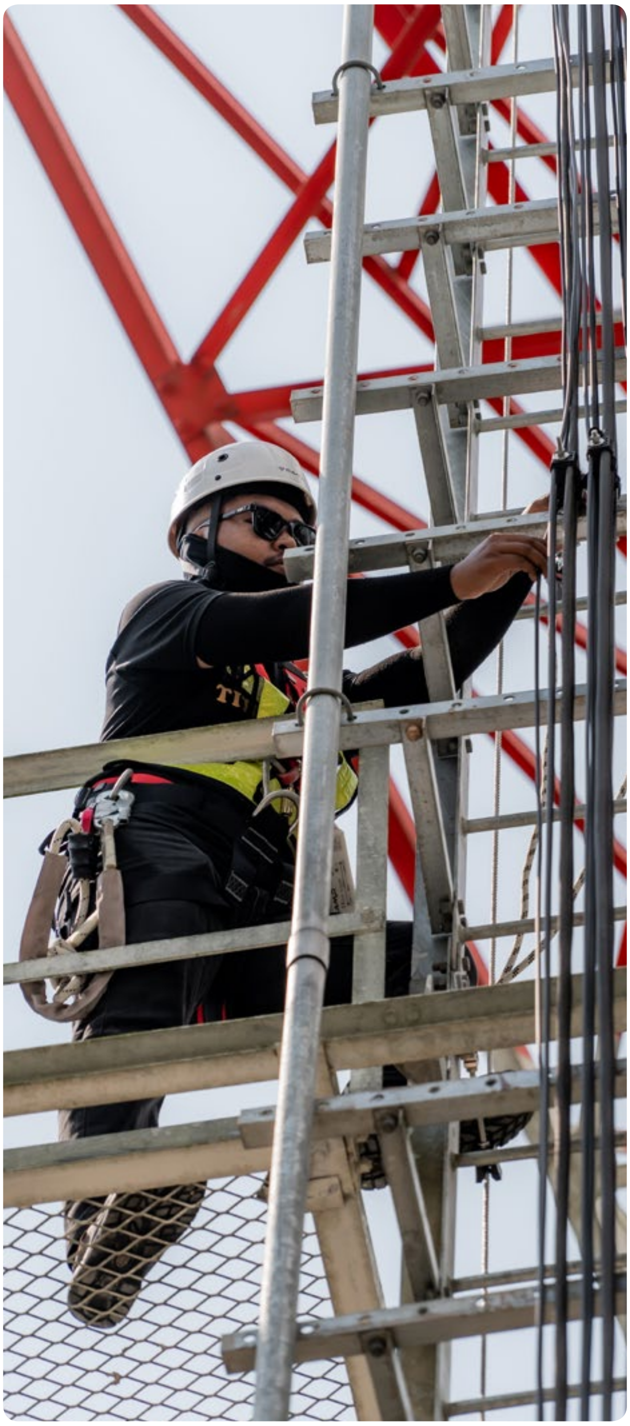
Updated MSQoS Parameters for Wireless Broadband Access Services

The updated MSQoS for wireless broadband focuses on three key technical aspects of service quality: service quality, user experience, and network performance as delivered by service providers.

Each of these criteria is measured using distinct methods. For service quality (QoS), both MCMC and service providers are required to conduct on-field measurements to assess the quality of the network experienced by consumers. In terms of quality of experience (QoE), service providers must carry out user experience measurements, particularly for video streaming and web browsing activities.

Additionally, the MSQoS mandates service providers to collect and report network statistical data, including metrics on network utilisation and availability. These parameters must be submitted to MCMC on a quarterly basis, no later than the 30th of the month following the end of each quarter. Failure to submit the report will be deemed non-compliance with the MSQoS and subject to regulatory action.

Table 7.36 outlines the key parameters and associated Key Quality Indicators (KQIs) used to measure service quality, user experience, and network performance under the MSQoS for Wireless Broadband Access Service.



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UPDATED KEY QUALITY INDICATORS FOR WIRELESS BROADBAND ACCESS SERVICE

No.	Key Quality Indicator	Key Quality Indicator
Quality of Service (QoS)	Download throughput	≥ 7.7 Mbps (4G) ≥ 100 Mbps (5G)
	Upload throughput	≥ 1.0 Mbps (4G) ≥ 3.0 Mbps (5G)
	Network latency	≤ 100 ms (4G) ≤ 40 ms (5G)
	Packet loss	≤ 0.5% (4G) ≤ 0.25% (5G)
	Accessibility	≥ 90.0% (4G and 5G)
Quality of Experience (QoE)	HTTP session time	≤ 5 seconds (4G and 5G)
	Video streaming access time	≤ 6 seconds (4G and 5G)
Network Performance (Utilisation)	Physical resource block	≤ 80% monthly (4G and 5G)
	Transport	≤ 80% monthly (4G and 5G)
	Core Network	≤ 80% monthly (4G and 5G)
	Point of interconnection	≤ 80% monthly (5G)
Network Performance (Availability)	Access and aggregation	≥ 99.50% quarterly (4G) ≥ 99.70% quarterly (5G)
	Core Network	≥ 99.97% quarterly (4G and 5G)
	Point of interconnection	≥ 99.97% quarterly (5G)
5G Access Network Statistics	Download throughput	≥ 100 Mbps
	Upload throughput	≤ 3.0 Mbps
	Network latency	≤ 35 ms (end user to national 5G POI) ≤ 15 ms (end user to regional 5G POI)
	Packet loss	≤ 0.25%
	Service accessibility	≥ 99.0%

Source: *MCMC*
Figure 7.36: *Updated Key Quality Indicators for Wireless Broadband Access Service*

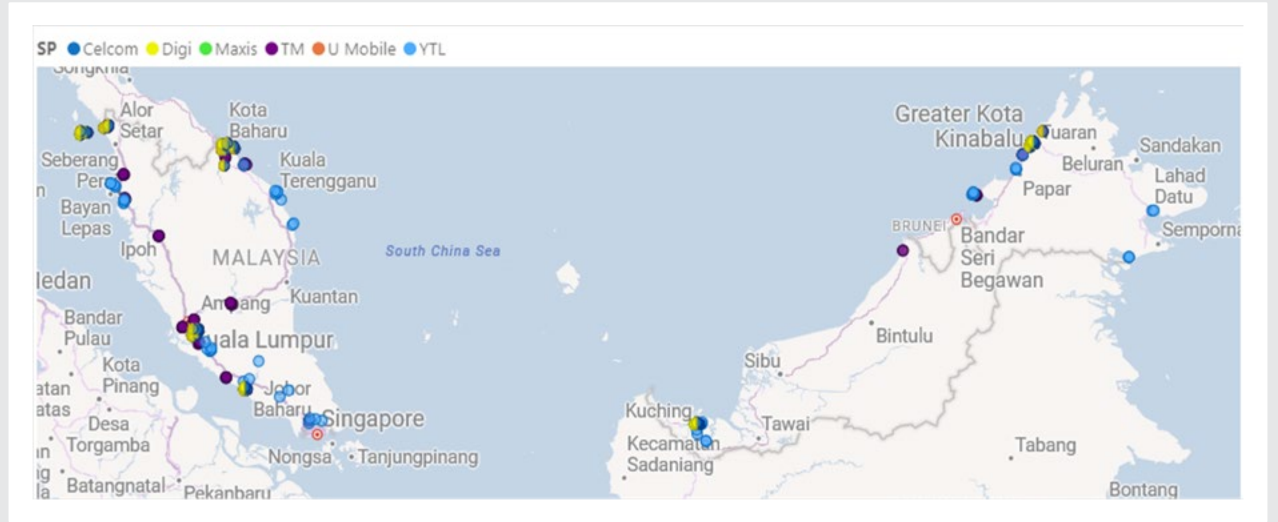
In 2024, MCMC received a total of 42 reports for the Q2 and Q3 submissions from five wireless broadband service providers and one 5G SWN provider. For end-to-end measurements, each service provider is required to conduct tests at a minimum of 200 locations for 4G and 50 locations for 5G in each quarter. A summary of the total number of test locations is presented in Figure 7.37, while Figure 7.38 highlights the selected test locations where measurements were conducted.

SUMMARY OF END-TO-END TEST LOCATIONS FOR WIRELESS BROADBAND CONDUCTED BY SERVICE PROVIDERS

Service Provider	4G Measurement			5G Measurement		
	Q2 2024	Q3 2024	Total	Q2 2024	Q3 2024	Total
Celcom	211	204	**415**	51	54	**105**
Digi	211	204	**415**	51	54	**105**
Maxis	211	204	**415**	51	54	**105**
U Mobile	211	204	**415**	51	54	**105**
TM Tech	227	276	**503**	73	132	**205**
YTLC	234	231	**465**	60	59	**119**

Source: *MCMC*
Figure 7.37: *Summary of End-to-End Test Locations for Wireless Broadband Conducted by Service Providers*

TEST LOCATIONS FOR END-TO-END WIRELESS BROADBAND MEASUREMENTS CONDUCTED BY SERVICE PROVIDERS



Source: *MCMC*
Figure 7.38: *Test Locations for End-to-End Wireless Broadband Measurements Conducted by Service Providers*

Monitoring of Network Performance and Utilisation for 4G and 5G Services

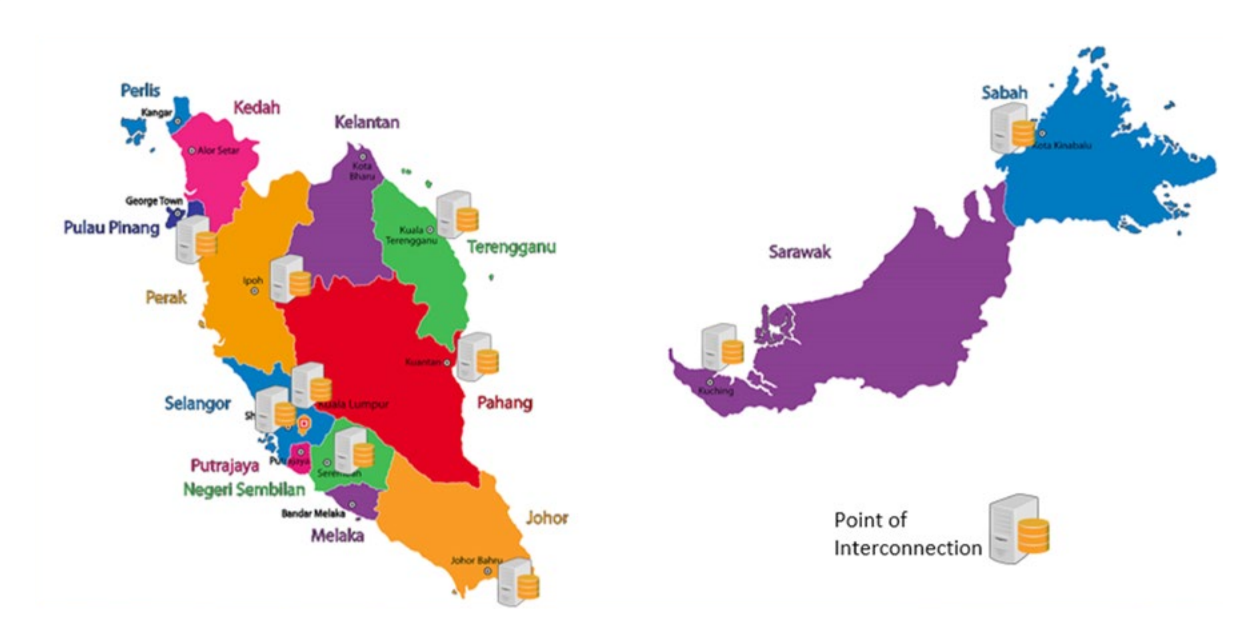
The end-to-end KQIs for both QoS and QoE are designed to ensure that network performance at the end-user level remains optimal to support common mobile internet applications. For 4G measurements, only three parameters are mandated, download throughput, network latency, and packet loss, while the remaining parameters are currently under monitoring. This approach provides service providers time to enhance their back-end infrastructure, such as regional core capacity, internet gateways, and cache servers, which will ultimately improve user experience. The additional parameters are expected to be mandated in 2025. Meanwhile, 5G networks are currently undergoing a transition from SWN to a dual-network model. Accordingly, the KQIs for 5G are currently under monitoring.

7

Network utilisation and availability for both the service providers and the 5G SWN provider are monitored across specific network segments, from the access network via Physical Resource Block (PRB) utilisation, through the transport layer, and into the core network. For the 5G SWN, an additional network node is monitored: the Point of Interconnection (POI), which is critical to preventing congestion and ensuring optimal use of 5G network resources. Where necessary, service providers implement network upgrades based on monitoring outcomes. All network utilisation KQIs are mandated for 4G service providers, while for the 5G wholesale provider, they remain under monitoring.

DNB has deployed ten POIs to facilitate interconnection between the 5G access networks and the core networks of individual service providers. These POIs are distributed across Malaysia, as illustrated in Figure 7.39. The capacity of each POI varies by service provider, depending on the number of subscribers and the network dimensioning requirements in each region. Similar to other network segments such as access, transport, and core, the POIs must also be upgraded progressively to accommodate the growing number of 5G subscribers.

LOCATIONS OF 5G SWN POINTS OF INTERCONNECTION



Source: *MCMC*
Figure 7.39: *Locations of 5G SWN Points of Interconnection*

The network availability parameter is mandated across the access, aggregation, and core networks of all service providers, while it remains under monitoring for the 5G wholesale network provider, including the POI. As the 5G SWN provider, DNB imposes more stringent availability requirements for its access and aggregation networks due to the critical nature of operating a single network infrastructure.

Monitoring and Reporting of Wired Broadband Quality of Service

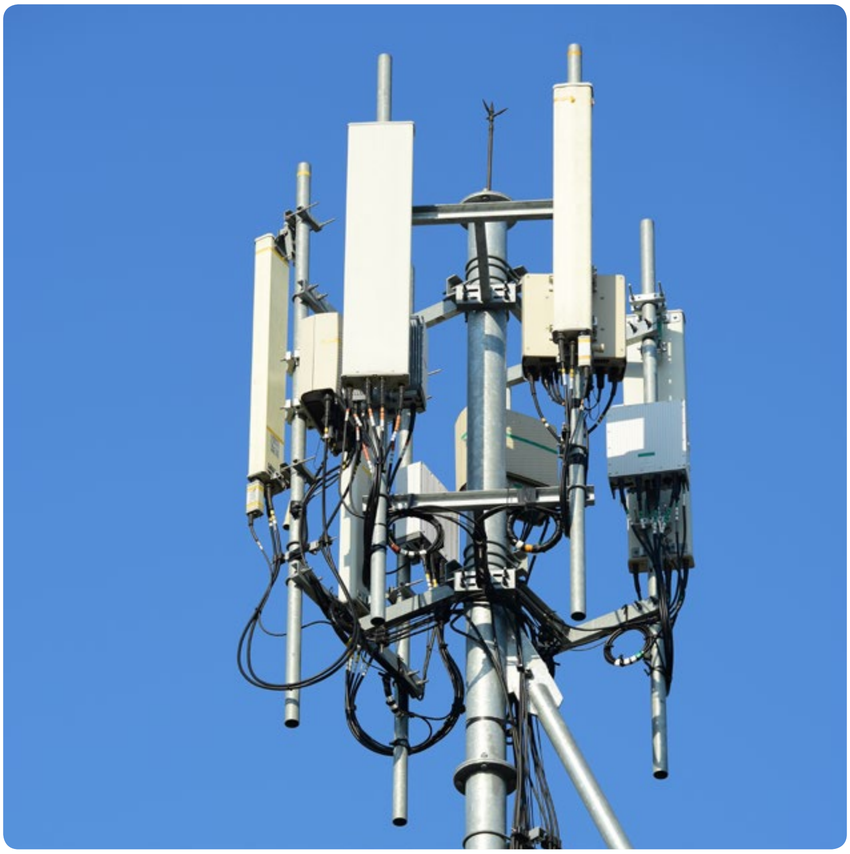
In addition to the MSQoS for Wireless Broadband, MCMC also monitors the performance of Wired Broadband Services based on a separate set of parameters enforced under the Commission Determination on the Mandatory Standards for Quality of Service (Wired Broadband Access Service) – Determination No. 1 of 2021.

The MSQoS for Wired Broadband Access Service came into effect on 1 August 2021. Figure 7.40 summarises the QoS indicators that fixed broadband service providers are required to monitor and report to MCMC.

QUALITY OF SERVICE INDICATORS FOR WIRED BROADBAND

QoS Indicator	Standard
Throughput	• DSL: 70% of subscribed speed for 90% of the time • Fibre: 90% of subscribed speed for 90% of the time
Network latency	• DSL: 85 ms for 95% of the time • Fibre: 50 ms for 95% of the time
Packet loss	• DSL: 1.0% • Fibre: 0.5%
Network utilisation	• Access and aggregation traffic utilisation for 3 months ≤ 70%

Source: *MCMC*
Figure 7.40: *Quality of Service Indicators for Wired Broadband*



In 2024, MCMC received 50 reports from 12 wired broadband providers in Q2 and 13 reports in Q3. Each provider is required to conduct end-user measurements at a minimum of 30 locations nationwide per quarter, subject to their respective service areas.

Figure 7.41 summarises the total number of premises measured based on report submissions, while Figure 7.42 provides a location map of the measurement sites. Additionally, Figure 7.43 presents the distribution of test locations by broadband subscription tier. The majority of consumers who participated in the measurements subscribed to the 100 Mbps download tier, which also corresponds with the most common upload speed tier.

SUMMARY OF MEASUREMENT LOCATIONS FOR WIRED BROADBAND CONDUCTED BY SERVICE PROVIDERS

Service Providers	DSL Locations	Fibre Location	Total
Allo	0	60	60
Astro	0	60	60
Celcom	0	60	60
Digi	0	60	60
Maxis	0	98	98
MYISP	0	26	26
MYPENANGFON	0	30	30
PCSB	0	30	30
Redtone	0	6	6
TIME	0	60	60
TM	6	54	60
U Mobile	0	30	30
YTL	6	54	60

Source: *MCMC*
Figure 7.41: *Summary of Measurement Locations for Wired Broadband Conducted by Service Providers*

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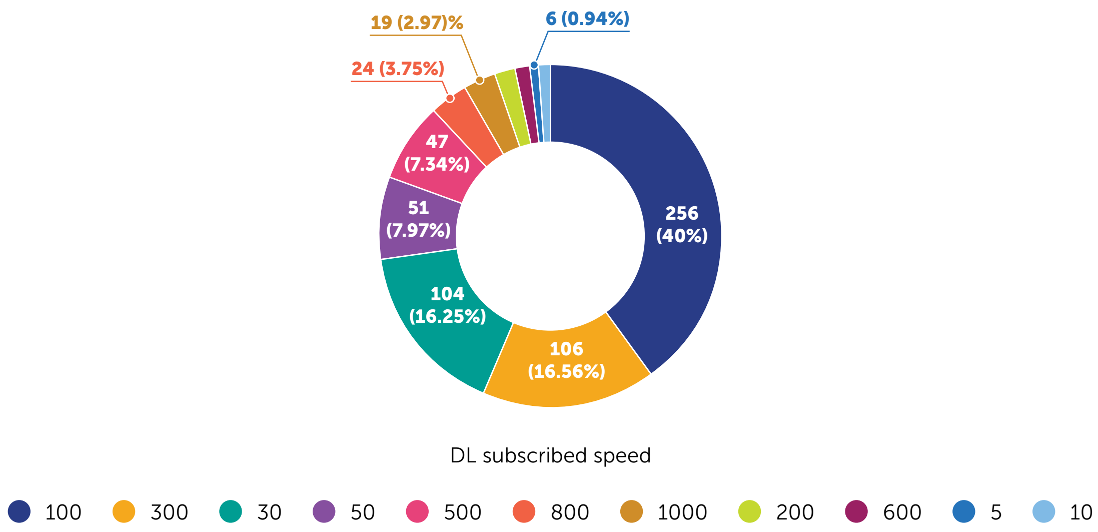
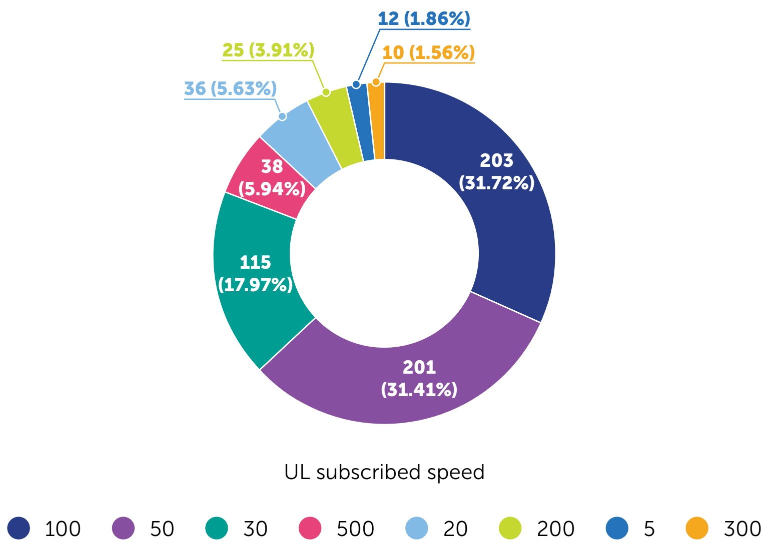
MEASUREMENT LOCATIONS FOR WIRED BROADBAND CONDUCTED BY SERVICE PROVIDER

Source: *MCMC*
Figure 7.42: *Measurement Locations for Wired Broadband Conducted by Service Provider*

SUMMARY OF CONSUMER SUBSCRIPTION TIERS BY DOWNLOAD AND UPLOAD SPEED





Source: *MCMC*
Figure 7.43: *Summary of Consumer Subscription Tiers by Download and Upload Speed*

To support accurate measurement, MCMC has collaborated with several wired broadband service providers in developing on-premise testing systems. Increasingly, service providers are adopting the Automatic Configuration Server (ACS) to facilitate remote testing. The use of ACS allows service providers to conduct measurements remotely while maintaining standardised test protocols and methodologies. New entrants such as U Mobile and PCSB have developed their own ACS systems to enable on-premise measurement capabilities.

Similar to the requirements for wireless broadband, wired broadband service providers are also required to submit network utilisation reports. This requirement applies to all service providers that own network infrastructure.

Monitoring and Reporting of Public Cellular Quality of Service

MCMC also monitors the performance of Public Cellular Service (PCS) based on a separate set of parameters enforced under the Commission Determination on the Mandatory Standards for Quality of Service (Public Cellular Service) – Determination No. 3 of 2021.

In effect since 1 August 2021, this MSQoS governs the quality of mobile voice call performance, which remains a critical aspect of mobile network services. Figure 7.44 summarises the list of QoS indicators that service providers are required to monitor and report to MCMC.

QUALITY OF SERVICE INDICATORS FOR PUBLIC CELLULAR SERVICE

QoS Indicator	Standard
Call setup success rate (CSSR)	≥ 98.0% for intra-network or inter-network voice calls
Dropped call rate (DCR)	≤ 1.0% starting from 2023 (≤ 2.0% prior to 2023)

Source: *MCMC*
Figure 7.44: *Quality of Service Indicators for Public Cellular Service*

In 2024, MCMC received 12 reports from service providers for the Q2 and Q3 reporting periods. Service providers are required to conduct voice call measurements on a quarterly basis, with a minimum of 3,000 voice call samples per quarter. Figure 7.45 presents the total number of voice call samples recorded by each service provider.

TOTAL VOICE CALL SAMPLES FOR PCS MEASUREMENTS

Source: *MCMC*
Figure 7.45: *Total Number of Voice Call Samples Recorded by Service Providers in Q2 and Q3 2024*

MARKET REGULATIONS

One of the key roles of MCMC is to develop policies, guidelines and regulatory instruments on competition and access for the communications and multimedia industry as well as the postal services industry. Additionally, MCMC also monitors and implements these policies to ensure compliance with the Communications and Multimedia Act 1998 (CMA 1998), Postal Services Act 2012 (PSA 2012) and its subsidiary legislations.

Key Activities in 2024:

a. Merger between Digi.Com Bhd and Celcom Berhad (formerly known as Celcom Axiata Bhd)

On 28 June 2022, MCMC had registered an undertaking under Section 140(3) of the CMA 1998 (Undertaking) following the issuance of a notice of no objection on the proposed merger between Celcom Berhad (formerly known as Celcom Axiata Berhad) (Celcom) and Digi Telecommunications Sdn Bhd (Digi). The Undertaking comprises of five key remedies to address competition concerns post-merger namely the divestment of 70MHz of spectrum, the establishment of a separate independent MVNO wholesale business unit, divestment of the prepaid brand Yoodo, removal of exclusive agreements and the commitment not to enter into any new exclusive agreements with distributors in those states where CelcomDigi holds a dominant position as well as the commitment to position Celcom and Digi's prepaid and postpaid brands as products under a single corporate brand.

MCMC monitors CelcomDigi's post-merger compliance based on quarterly independent audit reports submitted to MCMC within 30 days from the end of each quarter. These reports had been reviewed and feedback had been provided to CelcomDigi. These independent audit reports consist of the status of compliance for the five key remedies mentioned above.

b. Complaints on Anti-Competitive Conduct

In 2024, MCMC received eight complaints on anti-competitive conduct from the Consumer Protection Department, service providers under the CMA and PSA and other parties. These complaints are mainly related to issues of exclusivity and abuse of dominant position in the communications and postal markets. A total of seven complaints have been resolved in 2024, while one complaint is still under MCMC's assessment.

c. Accounting Separation

Beginning 2013, MCMC has implemented accounting separation on vertically integrated telecommunications service providers. Based on the Guidelines on Implementation of Accounting Separation in Malaysia, operators whose revenue and total assets in Malaysia both exceed RM 3 billion, such as Telekom Malaysia Berhad, CelcomDigi Berhad, Maxis Bhd and U Mobile Sdn Bhd, are required to submit detailed regulatory financial statements (RFS) for identified wholesale and retail services. Whereas, operators whose revenue and total assets fall below this threshold, such as TT DotCom Sdn Bhd, YTL Communications Sdn Bhd and YTL Broadband Sdn Bhd, are only required to submit a simplified RFS on wholesale and retail segments. MCMC noticed that most of the service providers' revenue are generated from retail services/segments rather than wholesale services/segments. In 2024, MCMC received RFS submissions from seven service providers for the financial year ending 2023, and all submissions have been assessed.

d. Competition in the Retail Market

MCMC monitors retail rates in the fixed, mobile, and pay TV markets to assess the level of competition in the market as well as to identify any anti-competitive conduct in terms of pricing. In 2024, MCMC monitored over 50 licensees that provided fixed broadband, mobile and Pay TV services to consumers.

For mobile services, the market was found to be competitive. 69% of the mobile subscriptions are from prepaid packages while the remaining are postpaid packages. As a result of competition, service providers have introduced new prepaid packages with unlimited high-speed data and unlimited data capped at a certain speed.

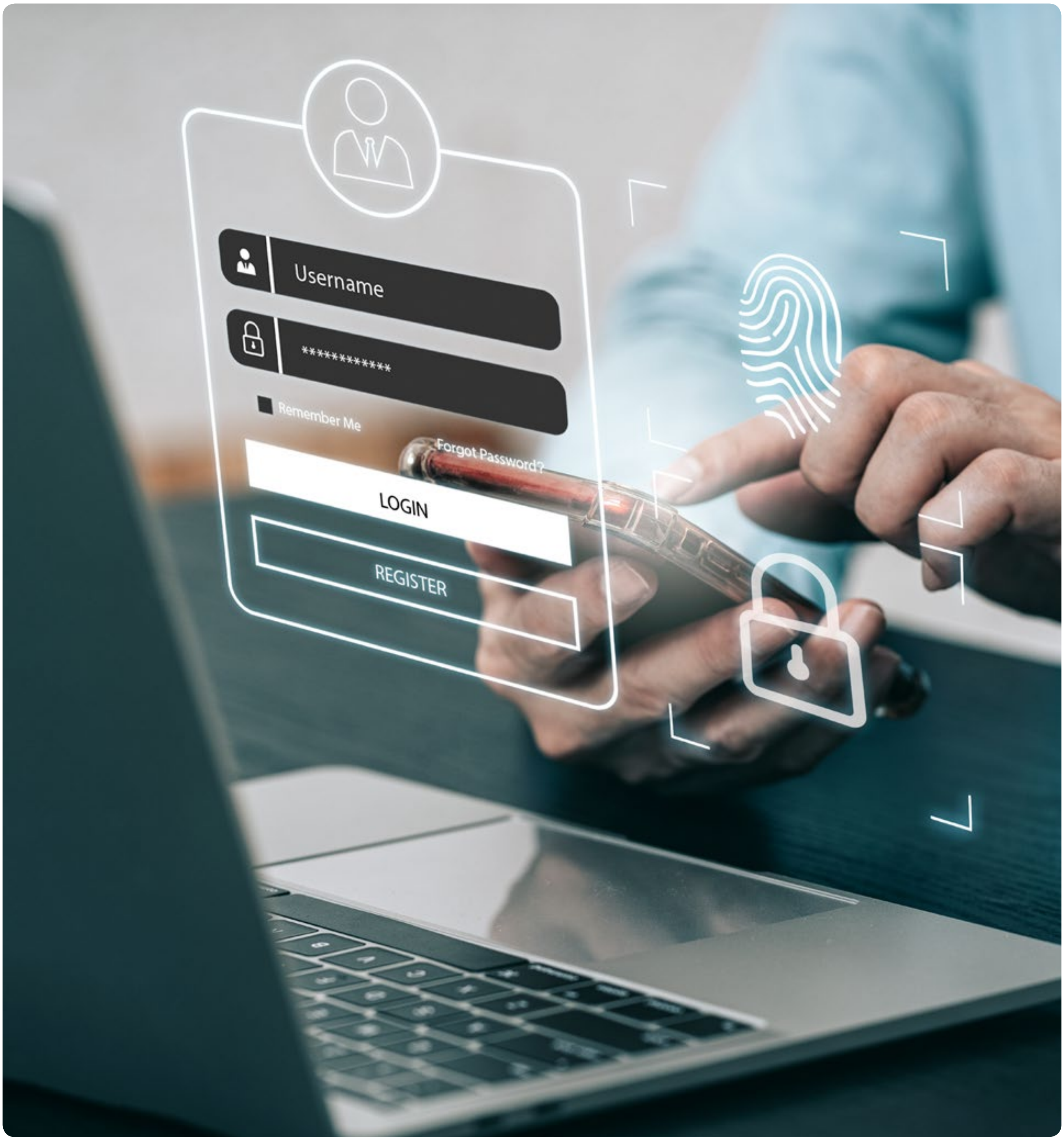
Between Q3 2023 and Q3 2024, the number of subscriptions for fixed broadband services had increased by 6%. As of Q3 2024, 91% of the subscriptions are for the speeds of 100Mbps and above. In contrast, 8% of the subscriptions are for the speeds ranging from 30Mbps to below 100Mbps, while only 1% of subscriptions are for speeds below 30Mbps. This indicates that most subscribers subscribe to higher-speed broadband packages.

As for pay TV packages, customers can choose to subscribe to Astro, Unifi TV, or additional video streaming services such as, among others, Netflix, Disney+ Hotstar, and Viu from Astro and Unifi TV. Customers can choose to subscribe to either standalone pay TV packages or packages bundled with fixed-broadband services from Astro and Unifi TV.

Implementation of Commission Determination on Access List, Commission Determination on the Mandatory Standard on Access and Commission Determination on the Mandatory Standard on Access Pricing

In the year 2024, the MCMC was actively involved in implementing, monitoring and regulating compliance with the following instruments:

- **a.** Commission Determination on Access List, Determination No. 6 of 2021 which came into effect on 15 December 2021 (Access List).
- **b.** Commission Determination on the Mandatory Standard on Access, Determination No. 1 of 2022 which came into effect on 1 November 2022 (MSA).
- **c.** Commission Determination on the Mandatory Standard on Access Pricing, Determination No. 1 of 2023 which came into effect on 1 March 2023.



1. Access Agreements

The MCMC reviews Access Agreements between access providers and access seekers to ensure that the access agreements comply with the CMA 1998 and other relevant access instruments. If the access agreements are not in compliance with the CMA 1998 and access instruments, both parties are required to amend the access agreements.

In year 2024, MCMC has received and reviewed a total of 18 access agreements. Four access agreements have successfully been registered pursuant to Section 150 of the CMA 1998.

2. Reference Access Offer

As mandated in the MSA, access providers who provide facilities and/or services listed in the Access List are obliged to publish a Reference Access Offer (RAO) on their respective website. MCMC carries out an assessment of the RAOs to ensure compliance with the access instruments, as well as with the CMA 1998. As of 31 December 2024, MCMC has assessed and reviewed 25 RAOs that have been published by Access Providers.

3. Engagement sessions on Access Issues

On 14 August 2024, MCMC conducted two awareness sessions on access framework, participated by 17 new and existing licensees. The awareness sessions were organised to provide insight into the access framework and access instruments, as well as to educate licensees on their roles and obligations as Access Providers and Access Seekers.

4. Reporting Obligations

In line with the MSA, access providers who provide High Speed Broadband (HSBB) Network Services, Transmission Services, Infrastructure Sharing, Network Co-Location Services, Duct and Manhole Access, Digital Terrestrial Broadcasting Multiplexing Service, Mobile Virtual Network Operator Access, Domestic Inter-Operator Roaming Service, 5G Services and IP Transit Service are obliged to submit reports to MCMC in October every year. In 2024, a total of 81 reports for the said facilities and/or services were received from the relevant access providers and reviewed by MCMC, to ensure compliance with the MSA.

5. Access Complaints, Access Disputes, and Termination of Service

One of the MCMC's crucial roles is to mediate and resolve access complaints, access disputes, and requests for suspension and termination of service.

In 2024, MCMC received two notifications of access dispute resolution, one decision that was escalated to the Appeal Tribunal for review, one decision that was escalated to judicial review, eight access complaints, and one application for the termination of service concerning facilities and/or services listed in the Access List, as well as compliance with MSA and the Commission Determination on Access Pricing.

In addition, MCMC continued to manage two ongoing applications received in 2023 regarding the suspension of service for facilities and/or services in the Access List, as well as compliance with the MSA.

As a regulator, MCMC has carried out its role in facilitating the negotiation between Access Providers and Access Seekers and resolving complaints and issues to ensure there is effective competition in the market for the long-term benefit of the end users.

6. Review of Mandatory Standard on Access Pricing

MCMC has completed the review of Mandatory Standard on Access Pricing for Network Co-location and 5G Services. As part of this review, questionnaires were issued to the key licensees to gather views and feedback on the requirements for price regulation for these services. Based on the feedback received, MCMC maintains its position during the Public Inquiry on the review of Mandatory Standard on Access Pricing to not regulate the Access Pricing for Network Co-location and 5G Services.

CONTENT REGULATION

Content regulation within MCMC is essential to ensure that media platforms provide safe, accurate and appropriate content to the public through clear guidelines and standards set by the CMA 1998, Content Code and content-related acts applicable to the Content Applications Service Individual (CASP-I) licensees. In carrying out its role as a regulatory body for communications and multimedia industry, MCMC is responsible in maintaining a balance between freedom of speech and the protection of societal and cultural values, ensuring that the media industry remains accountable, in compliance with regulatory requirements, ethical and aligned with the public's best interests.

Decline in Broadcasting Complaints

In 2024, MCMC received a total of three complaints related to radio and television broadcast content, marking a 62% reduction compared to eight complaints in 2023. The distribution of these complaints is illustrated in the table below.

COMPLAINTS RECEIVED BY PLATFORM

Platform	No. of Complaints		
	2022	2023	2024
FTA TV	6	6	1
Pay TV	8	2	1
Terrestrial Radio	4	0	1
Total No. of Complaints	**18**	**8**	**3**

Source: MCMC
Figure 7.46: Complaints Received by Platform

The significant decline in complaints reflects improved industry compliance and proactive engagement efforts by MCMC with broadcasters.

Approval for Live or Delayed Telecast Applications (LDTA)

As part of their licence conditions, all CASP-I licensees (except for Measat Broadcast Network Systems Sdn Bhd - ASTRO Pay TV) are required to obtain MCMC's approval for live or delayed broadcast programs and shows. Applications must be submitted via the LDTA system at least 14 days before the intended broadcast date.

In 2024, MCMC received and approved a total of 188 applications, distributed across different platforms as follows:

LIVE OR DELAYED TELECAST APPLICATIONS (LDTA) BY PLATFORMS

Platform/ Quarter	Quarter, 2024				Total
	1Q	2Q	3Q	4Q	
FTA TV	22	20	24	49	115
Pay TV	9	7	7	14	37
Terrestrial Radio	9	13	20	20	62
	40	**40**	**51**	**83**	**214**

Source: MCMC
Figure 7.47: Live or Delayed Telecast Applications (LDTA) by Platforms

Public Service Announcement (PSA)

MCMC continued to work closely with the Ministry of Communications in distributing government materials and messages to private television and radio stations to raise public awareness.

Throughout 2024, a total of 179 PSAs in the forms of videos/audios, crawlers, text announcements and infographics were disseminated and broadcasted by private broadcasters through their official channels, social media and digital platforms.

The source of these PSAs was diverse, originally from various government entities such as the Ministry of Communications, the Ministry of Health, the Prime Minister's Office, CyberSecurity Malaysia, the Ministry of Youth and Sports and the Ministry of Women, Family and Community Development amongst others.

The most widely distributed PSAs in 2024 were related to the nationwide programme *Program 2 Tahun Kerajaan MADANI (2TM) dan Konvensyen Nasional Reformasi Perkhidmatan Awam,* an initiative by the Prime Minister's Office to commemorate the second anniversary of the current administration and highlight its achievements in governance and public service reform.

Strengthening Compliance and Awareness in the Broadcasting Industry

As part of its regulatory mandate and reinforcement of content governance, MCMC has implemented the following initiatives to enhance broadcasters' compliance:

a. Compliance Briefings

Conducted regular engagement sessions with broadcasters to reinforce adherence to the CMA 98, the Content Code and other relevant regulations.

b. Monitoring and Enforcement

MCMC representatives actively participated in rehearsal sessions and live broadcasts to ensure compliance with broadcasting standards.

c. Introduction of SEPKA System

A new system called Sistem Edaran Pesanan Khidmat Awam (SEPKA) has been developed in September 2024 to streamline the dissemination of PSA content to broadcasters. In the previous years, PSA content was manually distributed to all CASP-I licensed television and radio stations through email. SEPKA modernises this process by automating and centralising PSA dissemination, ensuring efficient delivery and compliance tracking.

d. Training Sessions

To facilitate SEPKA adoption, training sessions were conducted for broadcasting stakeholders on 7th and 14th November 2024, ensuring the system is fully operational by early January 2025.

Industry Developments and Regulatory Enhancements

MCMC has also focused on policy improvements and regulatory enhancements to ensure a more structured approach to content monitoring and compliance of which indicate the following key developments:

a. Content Code Awareness

MCMC, in collaboration with the Communications and Multimedia Content Forum (CMCF), is actively working to raise awareness of the Content Code. Additionally, plans are in place to review and update the Content Code to address emerging challenges in content regulation, with a particular focus on online service providers.

b. Guideline for the Marketing of Intoxicating Liquor

This guideline was published on 30 October 2024 by CMCF and provides ethical standards for the advertising and promotion of alcoholic beverages in Malaysia. It aims to ensure responsible marketing practices that do not encourage excessive or irresponsible consumption, particularly among minors.

c. Nationwide *Kempen Keselamatan Dalam Talian*

As directed by YB Minister of Communications, a nationwide Kempen Keselamatan Dalam Talian is being planned to educate citizens on digital safety, responsible content consumption, and appropriate online behaviour. This campaign features multi-platform outreach efforts, including social media campaigns to raise awareness and provide practical digital safety tips; educational workshops and seminars targeting schools, universities, and community groups; public service announcements (PSAs) across television, radio, and online platforms; and collaborations with industry stakeholders to strengthen cybersecurity awareness and promote responsible online engagement.

Collaboration with Jabatan Agama Islam (JAKIM)

MCMC in collaboration with JAKIM, organised a three-day Open-Source Intelligence (OSINT) Skills and Investigation of Syariah Criminal Cases on Online Platforms Workshop from 20 to 22 November 2024.

The workshop aimed to equip participants with practical techniques for gathering and analysing information using open sources, a crucial skill in investigating Syariah-related offences on digital platforms.

COMMUNICATIONS AND MULTIMEDIA CONSUMER FORUM OF MALAYSIA (CFM)

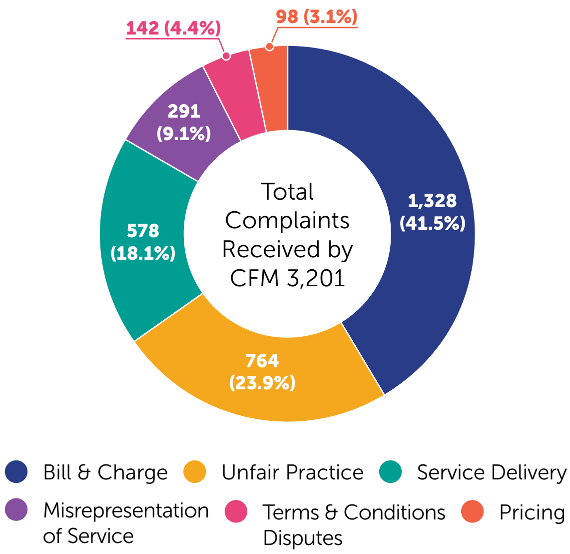
The Communications and Multimedia Consumer Forum of Malaysia (CFM) is an industry body established under the auspices of MCMC pursuant to Section 189 of CMA 1998. CFM serves as a platform for both industry and consumer representatives to collaboratively address consumer-related issues within the C&M industry.

In 2024, the MCMC Complaint Redress Portal recorded a total of 16,590 non-network complaints, reflecting an increase of approximately 6% from the 15,627 complaints recorded in 2023. Of these, CFM managed 3,201 appeal cases submitted by consumers who were dissatisfied with the initial resolutions provided by their service providers.

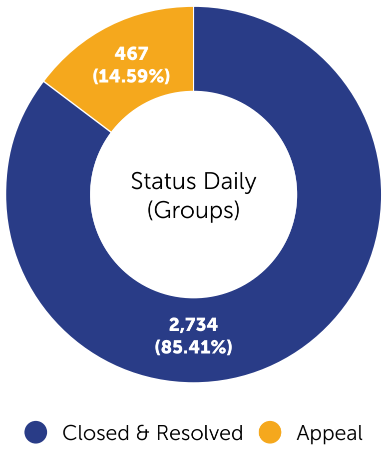
GCC-RELATED APPEAL COMPLAINTS RECEIVED THROUGH MCMC COMPLAINT REDRESS PORTAL IN 2024

Total Number of Non-Network Complaints	Total Number of Appeal Complaints Received	Total Number of Pending Appeal Complaints	Total Number of Resolved Complaints
16,590	**3,201**	**467**	**2,734**

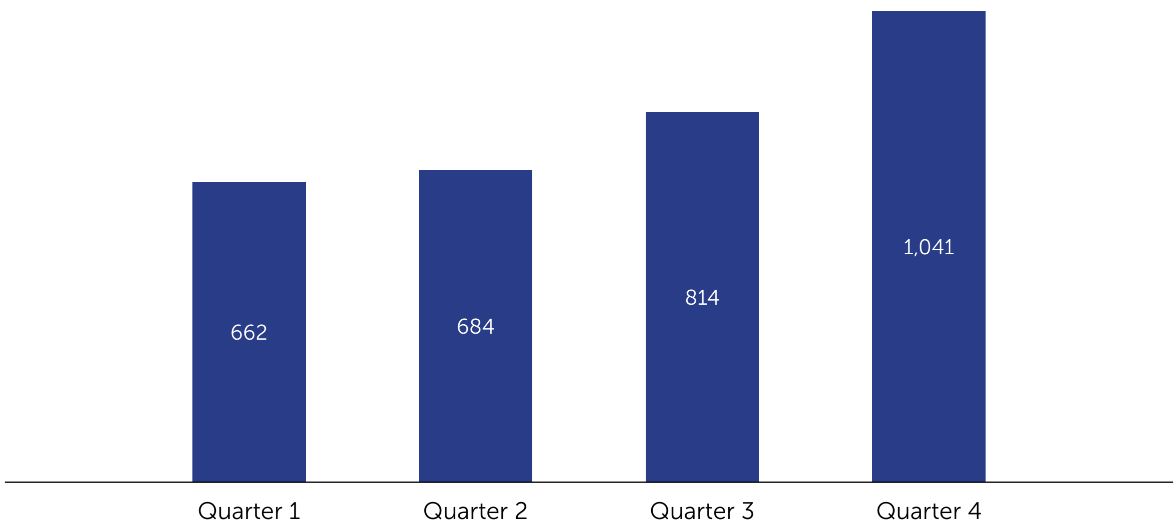
Total Number of Complaints by Sector 2024



Percentage of Complaint Status



Number of Complaints Received by Quarter



Source: *MCMC*
Figure 7.48: *GCC-related Appeal Complaints Received through MCMC Complaint Redress Portal in 2024*

The complaints managed by CFM in 2024 were categorised into six segments: Bill & Charge, Service Delivery, Misrepresentation of Service, Unfair Practice, Dispute of Terms & Conditions, and Pricing. As of 31 December 2024, CFM had resolved 2,734 out of the 3,201 appeal cases received through the MCMC Complaint Redress Portal.

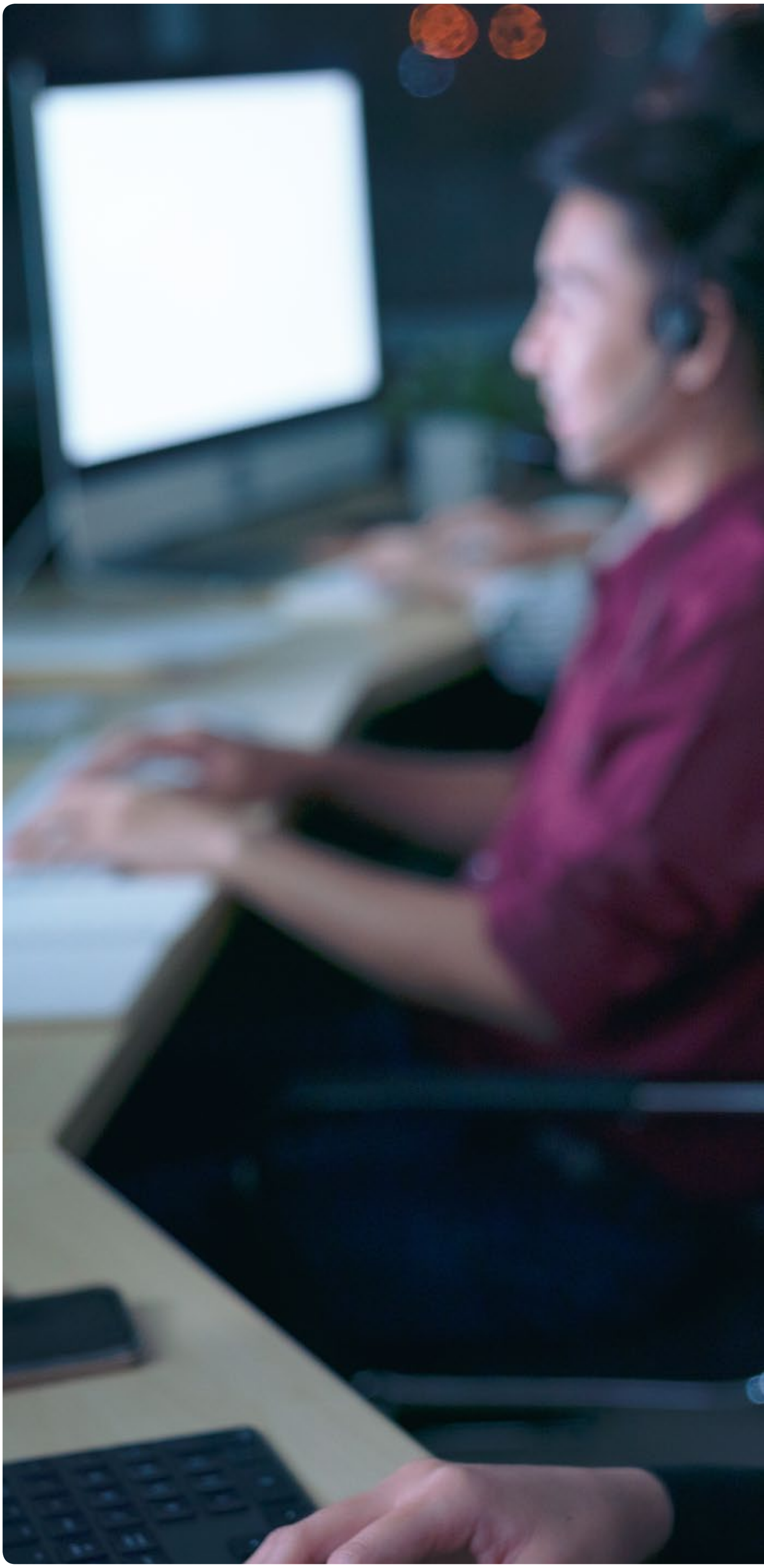
Bill & Charge remained the highest category of complaints, accounting for 1,328 cases or 41.5% of the total. Within this category, the Billing Dispute subcategory emerged as the most significant issue, comprising 26% of the 815 Bill & Charge-related complaints. This reflects persistent consumer concerns regarding discrepancies, invoicing errors, and unclear billing practices in the telecommunications sector.

CFM reviews every complaint it receives and engages both the service provider and the complainant to reach an amicable resolution. While most appeals are resolved through this process, more challenging or complex complaints may be addressed through mediation. In such cases, CFM acts as a neutral facilitator to help both parties achieve a mutually satisfactory resolution.

In 2024, CFM successfully managed and mediated 14 cases, which were resolved through a combination of physical and online meetings. All cases were subsequently marked as 'Resolved' and 'Closed' in the MCMC Complaint Redress Portal. Analysis of these mediation cases revealed that dissatisfaction with customer service was the main barrier to early resolution. The most common feedback from complainants prior to lodging their appeals was 'No action by the service provider,' which often led to refund requests. This trend indicates a gap in the resolution process and highlights the need for improved responsiveness and more effective customer service practices by service providers. It also underscores the importance of clearer and more consumer-friendly resolution procedures.

Performance of the MCMC Consumer Care Centre

In 2024, the MCMC Consumer Care Centre (MCMC 3C) received a total of 27,709 complaint calls, averaging 2,309 calls per month. The volume of calls fluctuated throughout the year and was categorised into nine categories: Telecommunication, New Media, Beyond MCMC Jurisdiction, General Inquiry, Postal and Courier, MCMC Provision, Portal Issue, Broadcasting, and Others (e.g. dropped calls or missed calls).

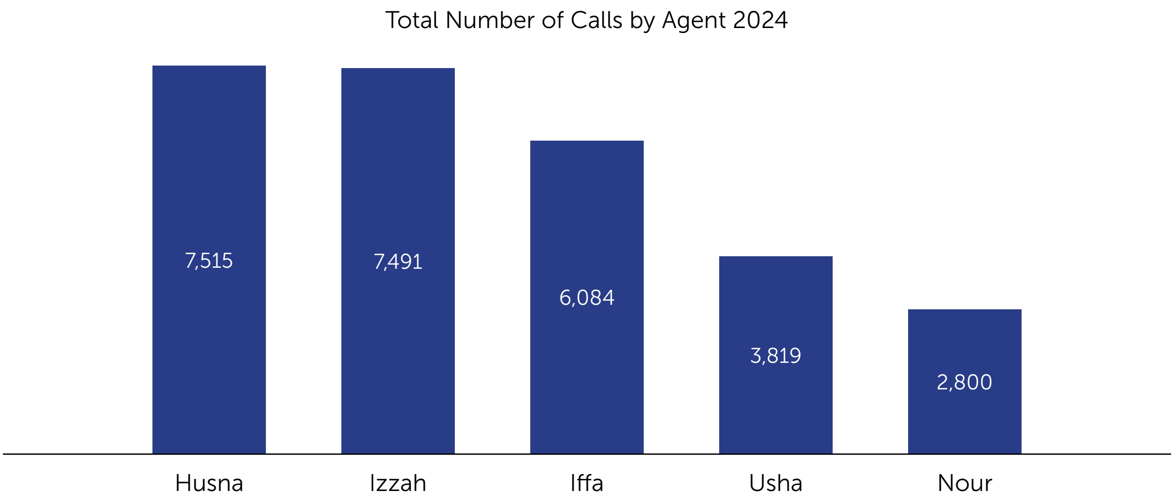


OVERVIEW OF MCMC 3C PERFORMANCE IN 2024

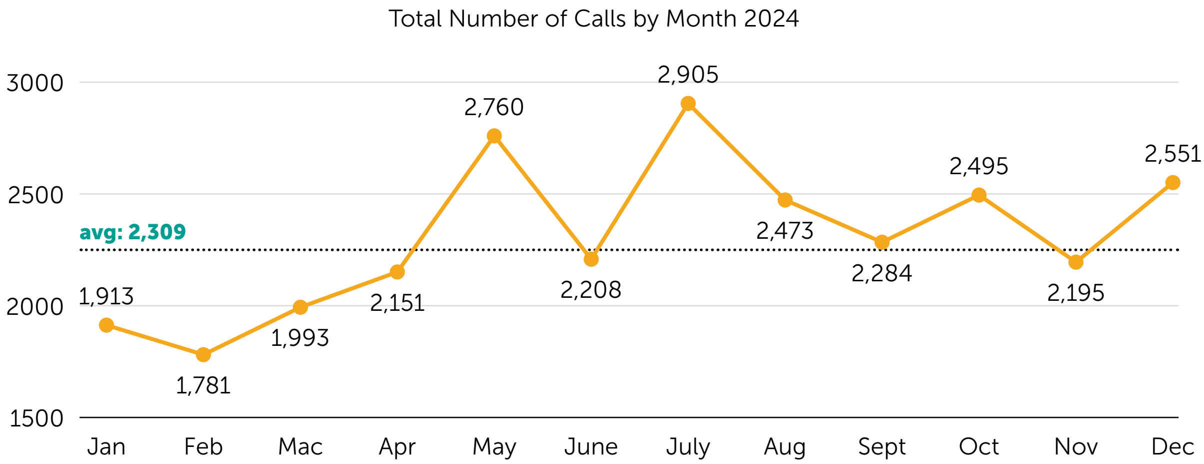
No. of Calls	Q1 Total Calls	Q2 Total Calls	Q3 Total Calls	Q4 Total Calls
27,709	5,687	7,119	7,662	7,241

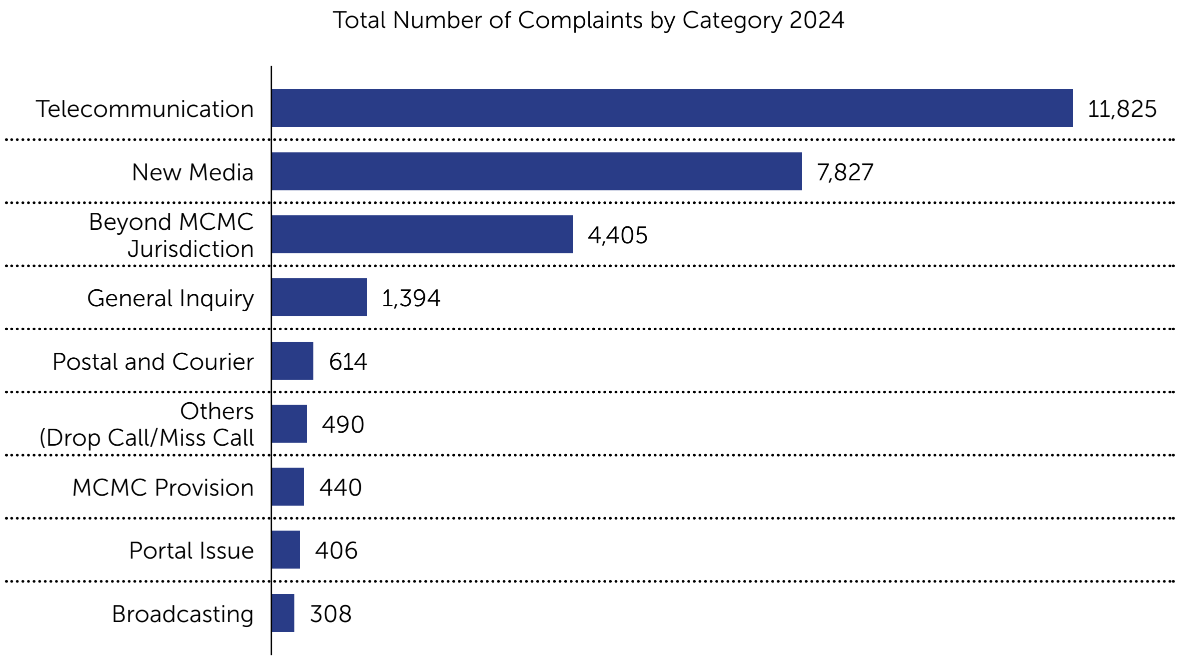
MCMC 3C Performance 2024

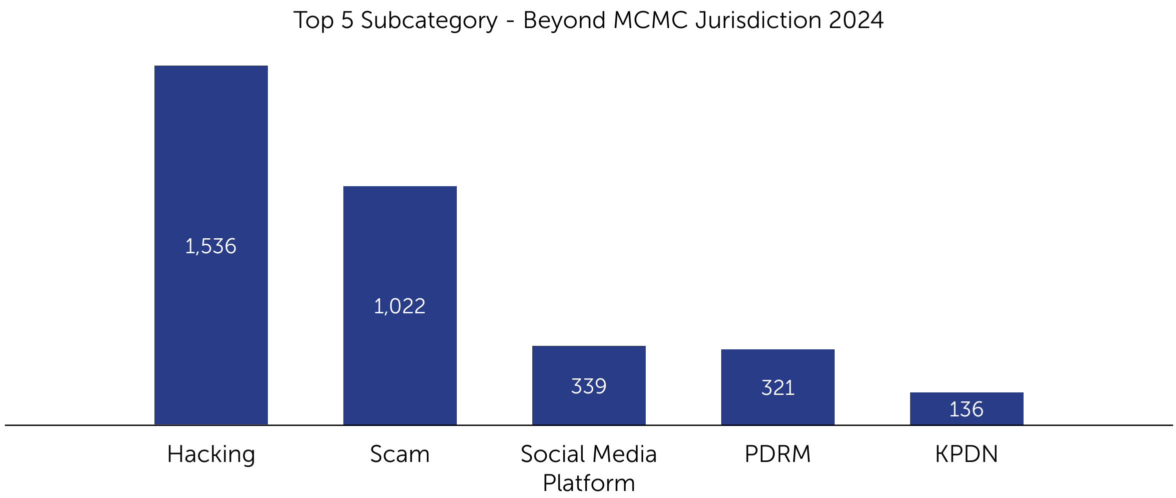
No.	Month	Answered within 20 secs	Answered within 40 secs
1.	January	98.2%	98.5%
2.	February	99.1%	99.9%
3.	March	98.9%	99.9%
4.	April	99.5%	100.0%
5.	May	98.8%	100.0%
6.	June	98.2%	99.8%
7.	July	98.2%	99.9%
8.	August	98.2%	100.0%
9.	September	94.9%	99.6%
10.	October	94.0%	99.4%
11.	November	95.0%	99.4%
12.	December	93.0%	99.4%



Source: MCMC
Figure 7.49: Overview of MCMC 3C Performance in 2024


Total Number of Calls by Month 2024
3000
2500
2000
1500
avg: 2,309
1,913
1,781
1,993
2,151
2,760
2,208
2,905
2,473
2,284
2,495
2,195
2,551
Jan
Feb
Mac
Apr
May
June
July
Aug
Sept
Oct
Nov
Dec


Total Number of Complaints by Category 2024
Telecommunication
11,825
New Media
7,827
Beyond MCMC Jurisdiction
4,405
General Inquiry
1,394
Postal and Courier
614
Others (Drop Call/Miss Call
490
MCMC Provision
440
Portal Issue
406
Broadcasting
308


Top 5 Subcategory - Beyond MCMC Jurisdiction 2024
1,536
1,022
339
321
136
Hacking
Scam
Social Media Platform
PDRM
KPDN

The highest number of calls received fell under the Telecommunication category, constituting 42.7%, followed by New Media (28.2%) and Beyond MCMC Jurisdiction (15.9%). On average, approximately 97.2% of total calls received by MCMC 3C were answered within 20 seconds. This high response rate underscores the critical role of MCMC 3C agents in maintaining the call centre's reputation while effectively managing consumer expectations.

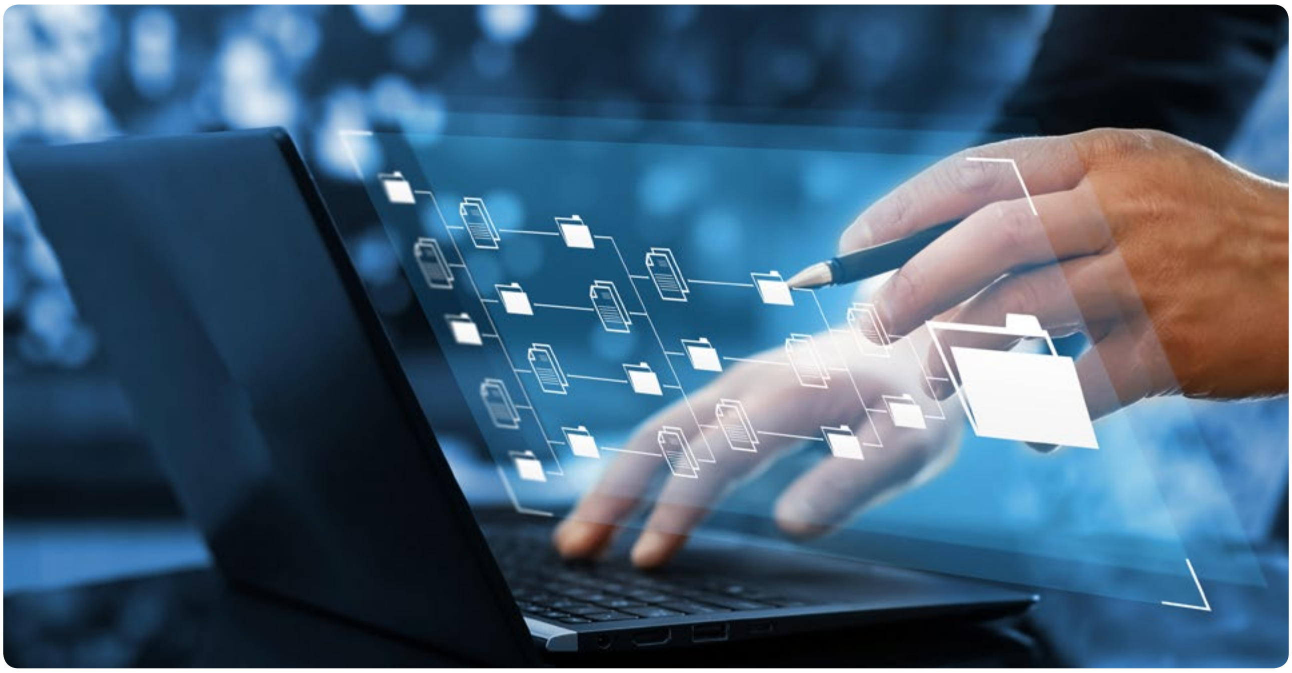
Complaint Handling Through aduan@cfm.my

CFM also received queries and complaints via email through aduan@cfm.my. Throughout 2024, CFM responded to 4,720 emails, advising potential complainants to lodge their complaints through the MCMC Complaint Redress Portal. The detailed activity report by quarter for 2024 is presented below.

SUMMARY OF COMPLAINT HANDLING VIA ADUAN@CFM.MY IN 2024

No.	Activity	No. of Incidents			
		1Q	2Q	3Q	4Q
1.	Advise Lodging Complaints on the Complaint Redress Portal (CRP)	1,588	1,302	836	994
2.	Follow-Up Email to CFM (ccmd@cfm.my)	49	33	63	1
3.	Follow-Up Email to Service Providers	2	0	0	0
4.	Follow-Up Email to MCMC (i.e. network, scam, spam, etc.)	5	1	2	3
5.	Beyond CFM Jurisdiction	347	370	323	238
6.	CC Email to aduan@cfm.my	1,372	2,073	1,360	187
Total		**3,363**	**3,779**	**2,584**	**1,423**

Source: *MCMC*
Figure 7.50: *Summary of Complaint Handling via aduan@cfm.my in 2024*



The General Consumer Code of Practice

The General Consumer Code of Practice for the Communications and Multimedia Industry Malaysia (GCC) is a self-regulatory industry code under the purview of CFM. It outlines the standards to be observed by service providers to ensure the efficient and quality delivery of services and serves as a key point of reference for consumers.

The latest iteration of the GCC was registered by MCMC in November 2022. Subsequently in 2023, CFM conducted four engagement sessions with selected service providers, namely Maxis Berhad, XOX Berhad, Symphonet Sdn Bhd and Telekom Malaysia Berhad, to raise awareness and promote compliance with the revised code. These briefings resulted in the following outcomes:

A

Promoting Compliance:

The primary objective was to ensure service providers were fully informed of the new features, functionalities, and improvements introduced in the updated GCC. These sessions helped service providers better understand the expectations for fair and transparent service delivery to consumers.

B

Ensuring Understanding:

CFM provided in-depth briefings on the purpose, scope, and key provisions of the code, including enhancements made in the latest version. This enabled service providers to adapt more efficiently to the changes.

C

Addressing Queries and Concerns:

The briefings also served as a platform for service providers to raise questions and seek clarification on the new provisions. The CFM team responded to queries and provided necessary guidance to ensure clear understanding of the GCC.

Additionally, as part of its continuous education efforts for the Complaints and Compliance Management team, CFM organised an engagement session with tribunal agencies on 20 February 2024 to gain insights into tribunal practices and complaint handling guidelines. The outcome of this session contributed to the development of a framework for Alternative Dispute Resolution (ADR), and a formal paper was subsequently submitted to MCMC on 26 April 2024.

CFM Ensures Industry Compliance

CFM monitors service providers to ensure greater compliance with the GCC, with the aim of improving service quality for consumers. In 2024, CFM issued seven caution notices to service providers for various breaches of the GCC. The issues highlighted in these notices included the provision of inaccurate information by customer service agents, the premature closure of complaints after a third resolution without proper engagement, and the dissemination of misleading information by dealers, among others.

LIST OF SERVICE PROVIDERS ISSUED WITH CAUTION NOTICES FOR GCC BREACHES IN 2024

No.	Service Providers	Date of Issuance
1.	Maxis Berhad	26 February 2024
2.	Telekom Malaysia Berhad	18 March 2024
3.	Maxis Berhad	15 April 2024
4.	Maxis Berhad	27 June 2024
5.	XOX Berhad	28 June 2024
6.	Pinggir Armada Sdn Bhd	23 July 2024
7.	Symphonet Sdn Bhd	19 August 2024

Source: *MCMC*
Figure 7.51: *List of Service Providers Issued with Caution Notices for GCC Breaches in 2024*

CFM's Advocacy and Outreach Initiatives

In 2024, CFM undertook a Brand Survey to assess public awareness and perception of the organisation, as part of preparations for a future rebranding exercise. The survey results revealed that only 4% of the 793 respondents were aware of CFM and its functions.

In response, CFM developed a three-year Communication Strategy Plan (2025–2027), aimed at positioning the organisation as a trusted and knowledgeable authority in educating, representing, and protecting consumer interests within the C&M industry. The strategy focuses on strengthening collaboration with CFM members and relevant agencies, enhancing public presence through on-the-ground engagement, reviving the CFM Rangers initiative, and participating in nation-building programmes.

Throughout 2024, efforts were centred on increasing CFM's visibility in consumer protection and advocacy initiatives. CFM conducted and participated in 19 programmes, including community talks, public carnivals, advocacy booths in shopping malls, and MADANI Rakyat events. These activities collectively reached and engaged over 3,000 individuals nationwide.

#jompakatHEBAH! Campaign (July – December 2024)

One of CFM's key initiatives in 2024 was the rollout of the #jompakatHEBAH! campaign, a six-month effort from July to December 2024 aimed at increasing CFM's visibility while advocating consumer rights in telecommunications and multimedia services.

CFM implemented the campaign through a range of activities, including on-the-ground events such as webinars and pocket talks held at community centres, universities, and public carnivals. In addition, CFM established a media collaboration with Berita Harian, launching a four-month advertorial series to educate the public. This collaboration featured consumer-related articles contributed by CFM and its members.

The following is a summary of advocacy and outreach programmes conducted in 2024.

LIST OF CFM ADVOCACY AND OUTREACH ACTIVITIES IN 2024

No.	Date	Programme
1.	3-4 February 2024	Youth Empowerment Fair 2024, Kuala Lumpur Convention Centre
2.	23 February 2024	Delegation Visit from Suruhanjaya Perkhidmatan Air Negara (SPAN)
3.	8 March 2024	#JomPakatHEBAH! Program: Knowledge Sharing and Engagement Session with CFM, Royal Chulan Hotel, Kuala Lumpur
4.	27 April 2024	Program Jendela Kehidupan: Community Engagement with the Orang Asli (Kg. Kolam Air and Kg. Jeram Kedah), Lenggeng, Negeri Sembilan
5.	3-5 May 2024	Program MADANI Rakyat (Northern Zone), Tapak Pesta Sungai Nibong, Penang
6.	9 May 2024	TeaTalk @MCMC: CFM Platform - Penyelesaian Isu Perkhidmatan Telekomunikasi Anda, MCMC HQ, Cyberjaya
7.	19 May 2024	Program Ekspresi Bulan Kebangsaan 2024, Stesen Sentral Kuala Lumpur, organised by the Jabatan Penerangan Malaysia
8.	6 June 2024	Webinar with MMU Students: CFM - Platform Penyelesaian Isu Perkhidmatan Telekomunikasi Anda, CFM Rangers Initiative
9.	15 July 2024	Courtesy Visit to the Communications and Multimedia Appeal Tribunal (TRKM) office, Putrajaya
10.	27 July 2024	Complaint & Advocacy Booth, GM Mall, Bukit Tinggi, Klang
11.	6-7 September 2024	Karnival Komunikasi (Southern Zone), Hutan Bandar Putra, Kulai, Johor
12.	13 September 2024	INTAN Minister's Conversation 2024, National Institute of Public Administration (INTAN), Kuala Lumpur
13.	27 October 2024	PKD Paya Jaras Open Day, Sungai Buloh, Selangor
14.	23 November 2024	Labuan Connect! 2024, Federal Territory of Labuan, organised by MCMC
15.	29-30 November 2024	Karnival Komunikasi 2024, IWK Eco Park, Pantai Dalam
16.	3 December 2024	Program Keselamatan Siber: Jom Bijak Internet, Tamu Hotel and Suites, Kuala Lumpur
17.	6-8 December 2024	Rock n Riuh, Sepang International Circuit, Selangor
18.	11 December 2024	#JomPakatHEBAH! Program with UniMAP 2024, Universiti Malaysia Perlis

Source: *MCMC*
Figure 7.52: *List of CFM Advocacy and Outreach Activities in 2024*

COMMUNICATIONS AND MULTIMEDIA CONTENT FORUM OF MALAYSIA (CMCF)

The Communications and Multimedia Content Forum of Malaysia (CMCF) was designated by MCMC as the consumer forum in March 2001. It serves as a platform for the Malaysian content ecosystem, bringing together stakeholders including content creators, distributors, and industry professionals. CMCF's primary objective is to promote and elevate the Malaysian content industry at both local and international levels.

Through advocacy, research, and collaborative initiatives, CMCF aims to foster innovation, raise industry standards, and support the growth of Malaysia's dynamic media and entertainment sector. By encouraging the exchange of ideas and promoting creative excellence, CMCF plays a vital role in shaping the future of content creation in the country.

In 2024, CMCF successfully welcomed 10 new members, further strengthening its diverse representation within the content ecosystem. The new members comprise film associations, legal firms, and technology platforms, with TikTok joining under the category of Technology, Media, and Digital Service Providers. This expansion enhances CMCF's capacity to collaboratively address industry challenges and promote ethical content practices.

CMCF spearheaded and participated in numerous events and initiatives, with a strong emphasis on community engagement and industry collaboration. These efforts reflect CMCF's continued commitment to raising awareness and driving meaningful change within the content industry.

#InvestInWomen: Inclusivity and Empowerment in the Digital Space

One of the key events in 2024 was a collaboration with the National Council of Women's Organisations (NCWO) and the Kuala Lumpur and Selangor Coalition of Women Organization (KLSCWO). In conjunction with International Women's Day, a forum themed #InvestInWomen: Inclusivity and Empowerment in the Digital Space was held on 1 March 2024. The event served as a significant platform to highlight the vital role of women in the digital era.

The first half of the programme featured a forum with prominent guest speakers, including Aireen Omar, Dr Kiranjit Kaur, Maria Chin Abdullah, Serene Lim, and Tehmina Kaoosji. This was followed by an interactive Content Code review session, which aimed to gather feedback on provisions related to women in the digital space.

Workshops and Training in Educational Institutions

CMCF partnered with the Ministry of Education to train over 300 educators during the Persidangan Edufluencer KPM held in Melaka, focusing on digital safety, ethical content creation, and managing online toxicity. In addition, CMCF conducted outreach sessions at higher education institutions such as UiTM Shah Alam and Xiamen University, engaging over 500 students in discussions on digital responsibility and ethical content creation. These sessions aimed to empower students to navigate online spaces responsibly while addressing challenges such as misinformation.

For younger audiences, CMCF also introduced foundational principles of online safety and digital literacy through workshops tailored for school-aged students.

Animation for Advocacy: Short Film Animation Competition

One of CMCF's notable achievements in 2024 was the successful organisation of a Short Film Animation Competition. This initiative engaged aspiring animators to develop Public Service Announcements (PSAs) aimed at promoting awareness of responsible content creation.

CMCF received 107 submissions, with six selected as winners. These winning PSAs are now being used to amplify CMCF's advocacy efforts, particularly among youth audiences, encouraging ethical and informed digital behaviour. The competition not only served as a platform for creative expression but also demonstrated the impactful role of animation in advancing advocacy messages.

Comprehensive Training and Workshops

In 2024, CMCF conducted a series of targeted training sessions and workshops tailored to the needs of various stakeholder groups. These initiatives aimed to promote ethical content practices, strengthen digital responsibility, and support the effective adoption of the 2022 Content Code.

a. Corporate and Media Professionals

CMCF collaborated with the National Press Club (NPC) on nationwide initiatives to upskill media practitioners, emphasising ethical journalism and the importance of self-regulation in an evolving media landscape. As part of these efforts, Inside the Scoop, a dedicated session with broadcasters such as Media Prima and Astro, focused on ethical reporting standards, particularly in relation to sensitive topics like children's content and suicide. These initiatives were complemented by ongoing dialogues with broadcasters and media specialists, which helped deepen understanding of the 2022 Content Code and encouraged its broader adoption across the industry.

b. Influencers and Edufluencers

The Creators IRL Masterclasses engaged influencers on ethical content creation, highlighting their role in shaping public discourse through digital platforms. In parallel, training sessions for edufluencers emphasised the role of educators as digital content creators, equipping them with the tools to promote responsible and impactful online engagement.

c. Athletes and Coaches

In collaboration with Majlis Sukan Negara, CMCF delivered specialised training for sports professionals. These sessions addressed online harms such as cyberbullying and provided guidance on fostering safe and respectful digital interactions.

Policy Contributions: Local and Global

In 2024, CMCF made significant contributions to policy development at both local and international levels. By providing expert input and participating in key discussions, CMCF played a pivotal role in shaping regulations and guidelines aligned with evolving industry needs and global best practices.

CMCF actively participated in various policy-making platforms, contributing to discussions that influence content regulation and digital governance:

a. United Nations Workshop with the Ministry of Economy

CMCF contributed to the second Cooperation Framework for 2026–2030, focusing on governance, participation, rights, and social cohesion. Emphasis was placed on the rights of persons with disabilities (PWD), children's rights, and women's rights.

b. Amendments to the CMA 1998 and the Online Safety Bill

CMCF contributed to national legislative consultations, particularly on issues related to content standards and regulatory updates that align with enhanced digital governance goals.

c. Ministry of Health Regulations on Electronic Cigarettes

CMCF provided expert input on content standards related to the advertising and promotion of electronic cigarettes.

d. Southeast Asia Regional Centre for Counter-Terrorism (SEARCCT) European Advertising Standards Alliance

CMCF participated in planning meetings on violence prevention strategies involving non-governmental organisations and civil society organisations.

e. Input to International Council for Ad Self-Regulation (ICAS) and European Advertising Standards Alliance (EASA)

CMCF supported the development of international standards on digital marketing, non-tobacco nicotine product advertising, and Out-of-Home advertising, reinforcing its role in global content policy discourse.

Public Statements and Policy Support

CMCF issued several media statements throughout the year in support of government initiatives and the broader regulatory agenda:

a. Support for Influencer Self-Regulation

CMCF backed Communications Minister YB Datuk Fahmi Fadzil's call for influencers to adopt ethical content practices and promoted the Content Code as a framework for self-regulation. The statement also advocated for child online safety through digital literacy, parental guidance, and a national framework involving all stakeholders.

b. Regulating Children's Social Media Use

CMCF supported the call by YB Datuk Fahmi Fadzil and MCMC for parents to prevent children under 13 from using social media, citing risks such as scams, emotional harm, and privacy breaches. The forum stressed parental responsibility and open communication regarding digital safety.

c. Religious Content Alignment with JAKIM

CMCF endorsed the Minister's call for religious content to follow JAKIM's guidance, particularly in the selection of certified Islamic speakers. This aligns with the Content Code 2022, which mandates compliance with national religious authorities. The statement emphasised that such alignment is essential to ensure accuracy and prevent misunderstandings in religious content.

d. Support for Social Media Licensing Framework

CMCF expressed readiness to regulate social media content under its role as an industry forum, aligning with MCMC's proposed licensing framework. The forum highlighted the Content Code as an established foundation for self-regulation.

e. Advocacy for AI Governance

CMCF welcomed the government's proposal for AI governance, calling for self-regulation of AI-generated content. The forum advocated transparency, trust-building, and safeguards against misleading content in the digital space.

f. Stance on Sharenting

CMCF supported YB Datuk Fahmi Fadzil's concerns on the risks of sharenting, which refers to parents sharing excessive information about their children online. The statement promoted responsible content sharing in line with the Content Code, emphasising child privacy and digital safety.

CMCF also supported responses to parliamentary questions on various content-related issues, including suicide-related and mental health content, and highlighted its contributions to updated guidelines and advocacy efforts.

Strategic Collaborations with Key Stakeholders

Collaboration remained at the heart of CMCF's efforts in 2024, with partnerships formed across various industries to advance shared objectives and strengthen the ecosystem for ethical content creation and regulation. These strategic alliances facilitated impactful initiatives, broadened outreach, and reinforced the importance of self-regulation in addressing contemporary content challenges.

a. Collaboration with KPWK and Zero Suicide Sarawak

CMCF collaborated with the Ministry of Women, Early Childhood, and Community Wellbeing Development (KPWK) and Zero Suicide Sarawak in developing the Sarawak Suicide Reporting Card (SASaR). This reference guide, available in three languages, is designed to support media practitioners and content creators in reporting suicide ethically and responsibly.

b. Partnership with AIDA and Shining Star Learning Hub

CMCF partnered with the Autism Inclusiveness Direct Action Group (AIDA) and Shining Star Learning Hub to raise awareness among parents, guardians, and individuals with autism regarding the risks of the digital age. The initiative promotes self-regulation as a tool to navigate online challenges effectively.

c. Memorandum of Understanding with UiTM

A Memorandum of Understanding was signed between CMCF and Universiti Teknologi MARA (UiTM) to collaborate on research, academic programmes, and community engagement initiatives centred on responsible content creation and dissemination. The partnership also aims to integrate the Content Code into UiTM's academic syllabus to promote ethical standards among future content creators.

d. Engagements with Global Technology Platforms

CMCF also strengthened its collaboration with leading global technology companies to enhance its advocacy efforts. With Google, CMCF jointly organised the Kids & Family Online Safety Workshop, which brought together regulators, NGOs, and parents to share strategies for creating safe digital environments and promoting family-friendly online experiences. In partnership with TikTok, CMCF launched the #ThinkTwice campaign to combat cyberbullying and encourage responsible content sharing. TikTok also conducted specialised training for CMCF's social media team to enhance engagement practices.

Meanwhile, collaboration with Meta included support for workshops and campaigns aimed at educating content creators and families on online safety and ethical content practices. This included participation in the Creators IRL campaign, which highlighted the importance of self-regulation in the digital landscape.

Complaints-Handling and Complaints Bureau Operations

Complaints continued to be effectively managed through the CMCF complaints portal, ensuring timely and fair resolution of issues raised by the public and industry stakeholders. In 2024, a total of 763 cases were handled, with the Complaints Bureau addressing nine of these cases.

This resulted in the issuance of five Complaints Bureau orders and four advisory orders, reinforcing the standards set out in the Content Code and promoting responsible content practices across the industry. Additionally, Tier 1-level support remained in place for complaints lodged with MCMC, reflecting a collaborative approach to content regulation.

Community Awareness and Public Relations

Strategic public relations initiatives played a key role in raising awareness of CMCF, the Content Code, and the broader importance of self-regulation. Through targeted activities, impactful campaigns, and proactive media engagement, CMCF successfully positioned itself as a leading advocate for responsible content practices. Press releases, media appearances, and collaborations with stakeholders were leveraged to amplify messaging across both traditional and digital platforms.

These efforts not only enhanced the organisation's visibility but also underscored the continued relevance of the Content Code in today's fast-evolving media environment. As a result, these initiatives achieved a notable PR value of RM 24,769,428.72, underscoring the effectiveness of CMCF's outreach and engagement strategies in promoting ethical content standards.

POSTAL FORUM

The postal industry, including its subset of courier services, is undergoing accelerated transformation in 2024. Rising consumer expectations, coupled with advancements in technology, are driving the need for higher service standards. Consumers now demand faster delivery times, more personalised experiences, and improved quality of service.

In response to these evolving trends and shifts in consumer behaviour, the Postal Forum continues to uphold its mandate under Section 50 of the Postal Services Act 2012 (PSA 2012) to represent and protect consumer interests within the postal services industry.

Key Highlights in 2024:

1. Code of Practice for Postal Services

On 30 December 2024, the Postal Forum achieved a major milestone with the development and approval of the Code of Practice for Postal Services (CPPS) by MCMC. The CPPS sets clear standards for the postal industry, serving as a reference for both consumers and licensees, and establishing a self-regulatory framework for postal services. It empowers consumers, ensures fair treatment, and protects their economic interests, regardless of their role as senders or recipients.

Developed in collaboration with licensees, government agencies, NGOs, and other stakeholders, the CPPS addresses critical areas such as service quality, consumer rights, dispute resolution, data protection, and operational transparency. This collaborative approach ensures the Code is responsive to the diverse needs of all parties within the postal ecosystem.

2. Empowering Consumer: Expanding Reach through Engagement and Advocacy

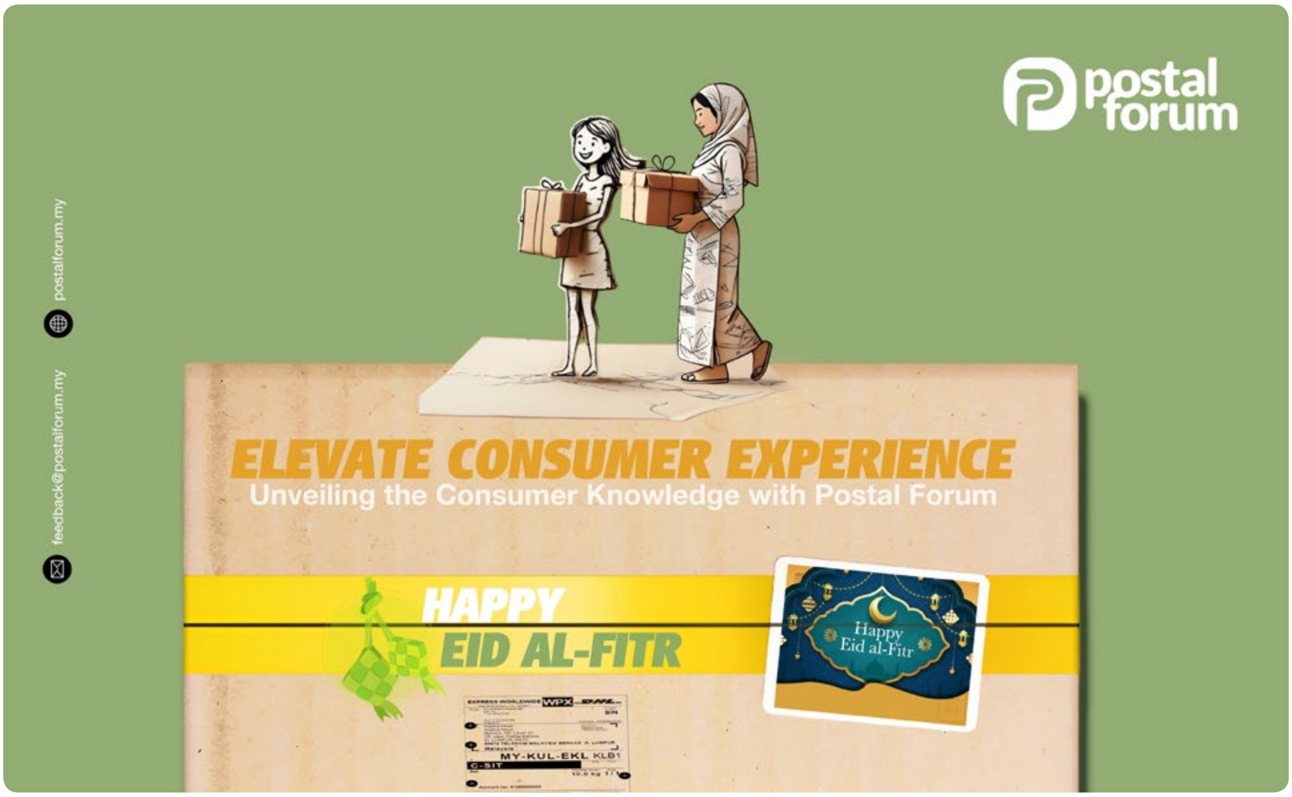
Throughout 2024, the Postal Forum successfully implemented over 32 consumer-focused initiatives, directly engaging more than 1,000 participants and reaching over 2 million individuals through both digital and traditional media platforms. These campaigns enhanced public awareness and educated consumers on key aspects of postal service usage.

Topics included practical guidance on securing parcels, such as proper packaging and labelling, declaring parcel value and contents, and the use of parcel insurance for added protection. Consumers were also informed about licensees' terms and conditions, how to avoid parcel-related fraud and scams, and where to seek recourse if complaints were not addressed by licensees. Through these efforts, the Postal Forum reinforced its commitment to advocating for fair treatment and providing guidance on effective complaint resolution, thereby fostering trust and confidence in the postal ecosystem.

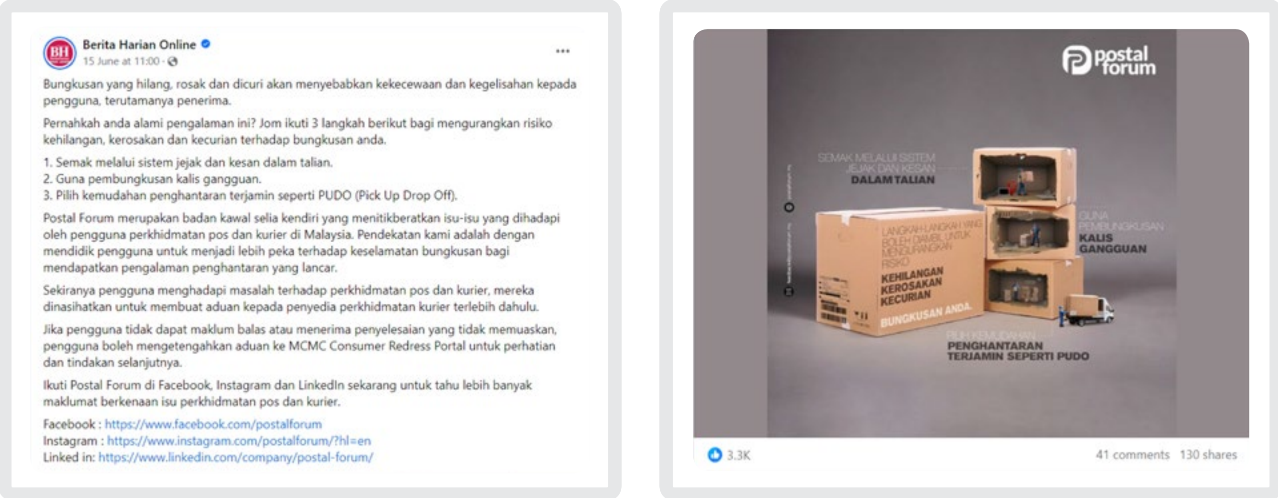
POSTAL FORUM'S CONSUMER AWARENESS PROGRAMMES IN 2024

No.	Date	Programme
1.	15 February 2024	Community Awareness Programme at NADI Felda Soeharto, Kuala Kubu Bharu
2.	4 May 2024	Program Kesedaran Komuniti: Program Kemampanan Komuniti Bandar (PKKB) peringkat Majlis Daerah Pengkalan Hulu
3.	28 – 30 June 2024	Karnival Jom Heboh Melaka
4.	16 March 2024	Public Awareness Programme at SK Desa Aman, Sg Buloh
5.	11 December 2024	Jom Pakat Hebah Programme at UniMAP

Source: *MCMC*
Figure 7.53: *Postal Forum's Consumer Awareness Programmes in 2024*

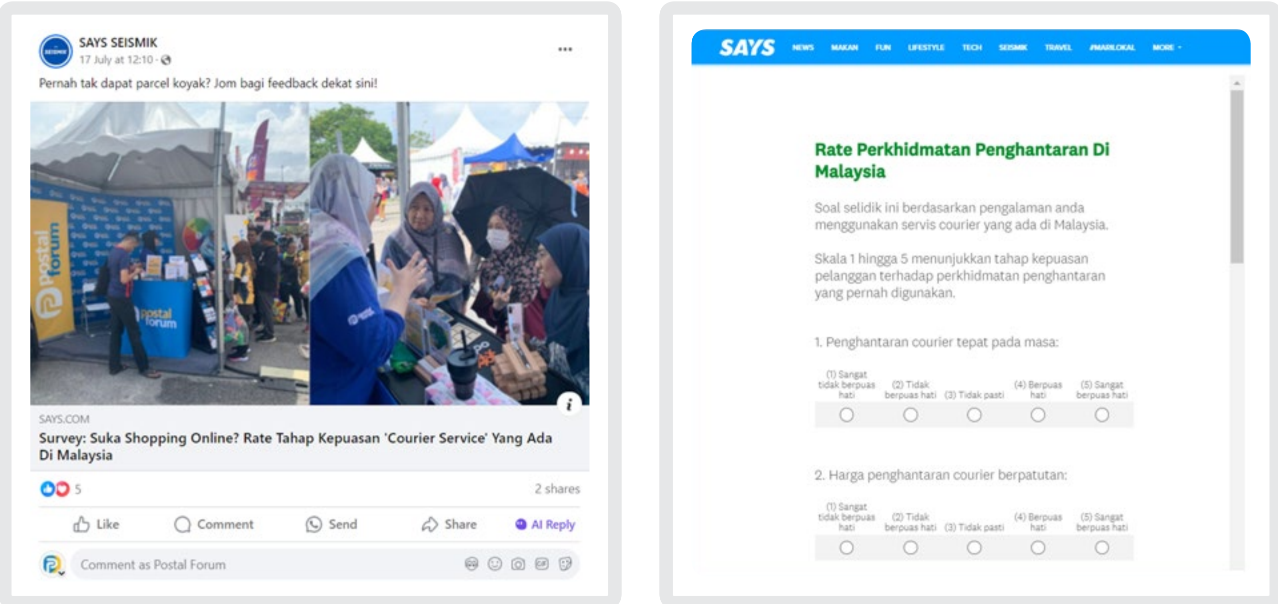


Source: *MCMC*
Figure 7.54: *Postal Forum's Consumer Empowerment Efforts Featured in New Straits Times on 13 April 2024*



Source: MCMC
Figure 7.55: *Parcel Safety Tips Shared on Berita Harian Facebook, 15–22 June 2024*

Additionally, a social survey and a follow-up social media story highlighting the Postal Forum and its key functions were published in July and October 2024, respectively. These initiatives aimed to gauge public awareness and further educate consumers on the Forum's role in advocating for their rights and enhancing service standards across the postal and courier industry.



Source: MCMC
Figure 7.56: *Social Survey on Postal Forum Functions, July & October 2024*

To support continuous engagement, the Postal Forum also publishes a monthly Consumer Affairs Report for its members (licensees), featuring consumer advisory statistics and relevant research articles aimed at fostering industry improvements. In addition, a quarterly Consumer Bulletin highlights the Forum's key initiatives and addresses critical issues related to postal and courier services. These efforts reflect the Postal Forum's commitment to enhancing the consumer experience while supporting the sustainable growth of the industry.

The Forum has also strengthened its representation of consumer interests, as demonstrated by its growing membership base. This includes the addition of six new Ordinary Members and a significant 334% increase in the Associate Membership category.

7

3. Enhancing Industry: Industry Improvement Programme and Engagement

In 2024, the Postal Forum reaffirmed its commitment to strengthening the postal and courier industry by organising a series of ten industry engagement and development programmes. These included workshops, training sessions, seminars, and stakeholder engagements, all strategically designed to address the evolving challenges faced by licensees and consumers. The initiatives aimed to equip licensees with the knowledge, skills, and tools necessary to improve operational efficiency, adopt technological advancements, and elevate overall quality of service.

This comprehensive approach has contributed significantly to driving improvements across the industry, enhancing customer satisfaction, and increasing the sector's competitiveness in an ever-changing landscape.

A key highlight in 2024 was the Postal Forum's role as co-host of the inaugural Hari Kurier Negara alongside the Association of Malaysian Express Carriers. During the event, the Postal Forum showcased participants of the MyKURIER Safety Star Rating programme and marked the launch of the Courier Safety Passport programme through a Memorandum of Understanding, reinforcing its commitment to safety and excellence in the courier sector.

POSTAL FORUM'S INDUSTRY IMPROVEMENT PROGRAMMES AND ENGAGEMENT SESSIONS IN 2024

No.	Date	Programme
1.	Jan-Oct 2024	MyKURIER Safety Star Rating Phase 2
2.	9 November 2024	Hari Kurier Negara
3.	9 November 2024	Launch of Courier Safety Passport Program
4.	6 March 2024	Personal Data Protection Act (PDPA) 2010
5.	31 July 2024	Awareness about the Anti-Money Laundering Act (AMLA) and its implication to the courier industry
6.	26 November 2024	MCMC Consumer Redress Portal (CRP) Refresher
7.	19 June 2024	Elevating Customer Service Experience in the Postal Courier Industry

Source: *MCMC*
Figure 7.57: *Postal Forum's Industry Improvement Programmes and Engagement Sessions in 2024*

Consumer Advisory: Strengthening Consumer Complaint Management

The Postal Forum made significant progress in enhancing consumer satisfaction and reducing complaints within the postal and courier industry. Among the key initiatives was the launch of the Quick Tools Checklist, designed to help consumers address common issues promptly. In addition, public awareness campaigns such as the Ship Out Your Bulky Parcel video and the Prohibited Items newsletter, developed in collaboration with licensees, were rolled out. Several licensees also supported these initiatives by sharing the content at their outlets and through social media platforms. These efforts aimed to educate consumers on best practices, including shipping restrictions, appropriate packaging, and other essential guidelines.

To further strengthen complaint management, the Postal Forum also reviewed and updated its Frequently Asked Questions (FAQs) and the Best Practices Guide for Complaint Handling, making these resources available online for wider industry adoption. Collectively, these measures contributed to a decline in consumer complaints, improved public awareness, and enhanced the overall quality of service delivered by licensees.

In 2024, the Postal Forum effectively handled 7,876 cases received through the Consumer Redress Portal (CRP), implementing swift intervention measures by escalating complaints to licensees within three business days. These interventions included providing recommendations and suggestions to facilitate prompt and effective resolutions, addressing the concerns of affected consumers.

Since December 2023, the Postal Forum has also managed 100% of second-level complaints for all postal and courier licensees, ensuring a comprehensive and consistent approach to complaint resolution.

Based on the complaints received, the top three issues were: late delivery (43% of total complaints), poor service delivery (19%), and lost letters or parcels (11%). Notably, complaints related to late delivery showed a 58% improvement compared to 2023. Overall, the top three complaint categories recorded a 9% reduction in 2024 compared to the previous year.

MONTHLY TABULATION OF COMPLAINTS RECEIVED FROM ICMS

Month	Issues			Total Top 3 Issues	Total Complaint
	Late delivery	Poor service delivery	Lost letters/ parcels		
Jan	352	137	82	571	752
Feb	258	115	73	446	604
Mar	390	114	84	588	789
Apr	378	106	116	600	792
May	287	139	96	522	712
Jun	264	187	107	558	766
Jul	172	117	56	345	499
Aug	160	138	42	340	494
Sep	237	84	26	347	466
Oct	252	132	46	430	603
Nov	295	126	58	479	662
Dec	363	120	76	559	737
Total	**3,408**	**1,515**	**862**	**5,785**	**7,876**

Source: *MCMC*
Figure 7.58: *Monthly Tabulation of Complaints Received from ICMS*

MALAYSIAN TECHNICAL STANDARDS FORUM BHD (MTSFB)

The Malaysian Technical Standards Forum Bhd (MTSFB) was incorporated on 8 June 2004 and subsequently designated and registered by MCMC as the Technical Standards Forum on 27 November 2004, pursuant to Sections 94 and 184 of the CMA 1998.

MTSFB is responsible for the development and maintenance of technical codes related to network interoperability requirements and the promotion of network facility safety. Its scope also includes other technical aspects such as network provisioning, application services, and the certification of communications equipment, in accordance with Chapter 9 of Part V and Chapter 3 of Part VII of the CMA 1998.

Technical Codes Development

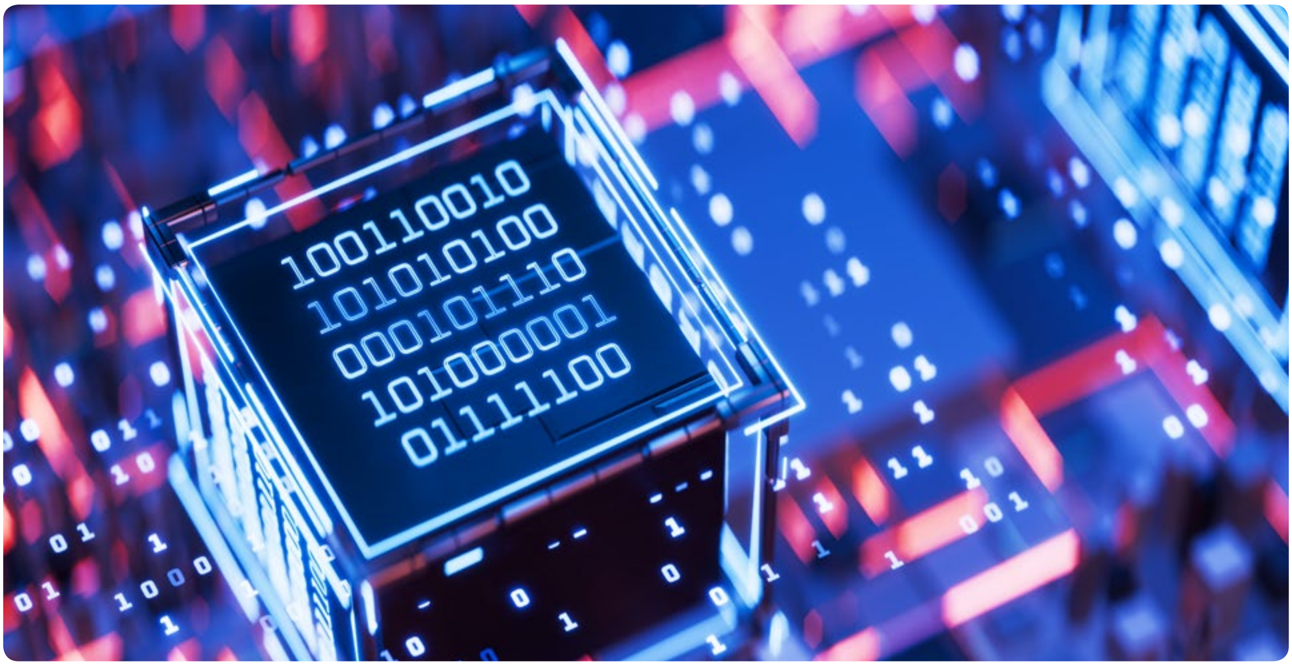
As of 31 December 2024, a total of 115 technical codes have been registered under the CMA 1998, of which 77 remain active. Among these, 28 technical codes are specifically intended for the certification of communications equipment under the Communications and Multimedia (Technical Standards) Regulations 2000 (TSR 2000).

In 2024, 11 new technical codes were registered, covering various subjects such as network security, smart cities, the Internet of Things, and green data centres. The list of registered technical codes for 2024 is provided in Table 7.59.

LIST OF TECHNICAL CODES REGISTERED IN 2024

No.	Programme
1.	MCMC MTSFB TC T011:2024 - Digital Terrestrial Television Broadcast Service Receiver - Common Test Suite (Third Revision)
2.	MCMC MTSFB TC G004:2024 - Specification for Green Data Centres (First Revision)
3.	MCMC MTSFB TC G009:2024 - Information and Network Security - Requirements (Second Revision)
4.	MCMC MTSFB TC G014:2024 - Business Continuity Management – Requirements (First Revision)
5.	MCMC MTSFB TC G015:2024 - Information and Network Security - Incident Management (First Revision)
6.	MCMC MTSFB TC G024:2024 - Fixed Network Facilities – In-building and External (First Revision)
7.	MCMC MTSFB TC G038:2024 - End-to-End (E2E) Quality of Service (QoS) and Quality of Experience (QoE) using Crowdsource Application Approach (First Revision)
8.	MCMC MTSFB TC G045:2024 - Internet of Things - Device Security Requirements
9.	MCMC MTSFB TC G046:2024 - Internet Protocol (IPv6) - Security Requirements
10.	MCMC MTSFB TC G047:2024 - Smart City - Data Integration Platform
11.	MCMC MTSFB TC G048:2024 - Smart City Platforms Interoperability Requirements

Source: *MCMC*
Figure 7.59: *List of Technical Codes Registered in 2024*



The development process for each technical code includes a one-month public comment exercise, designed to gather feedback from interested parties on the draft versions. During this period, MTSFB also conducted public engagement sessions targeting stakeholders who may be impacted by or have an interest in the proposed technical codes. These sessions brought together MTSFB subject matter experts to share insights and provide clarifications to the intended audience. In total, MTSFB organised seven public engagement sessions throughout 2024, as detailed in Table 7.60.

LIST OF PUBLIC COMMENT EXERCISES AND ENGAGEMENT SESSIONS IN 2024

No.	Technical Codes	Public Comment Exercise	Public Engagement Session
1.	a. Cellular Vehicle-to-Everything (V2X) System Architecture and Specifications b. Specifications for Green Data Centre (First Revision)	25 April – 24 May 2024	17 May 2024
2.	End-to-End (E2E) Quality of Service (QoS) and Quality of Experience (QoE) using Crowdsource Application Approach (First Revision)	24 May – 23 June 2024	13 June 2024
3.	a. Prediction and Measurement of RF-EMF Exposure from Base Station b. Digital Identity Security Management (DISM) c. Malaysia Cybersecurity Maturity Capability (MyCMC) d. IoT - Conformance Assessment of Baseline Security Requirements for Consumer Devices	18 July – 16 August 2024	7 August 2024
4.	Internet Protocol Version 6 (IPv6) - Deployment Specifications for Segment Routing over Internet Protocol version 6	1 - 31 August 2024	14 August 2024
5.	a. Land Mobile Radio Equipment – Specifications b. Communications Infrastructure Asset Management (CIAM)	22 August – 21 September 2024	10 September 2024
6.	Voice over LTE - System and Device Compatibility	1 – 30 October 2024	16 October 2024
7.	a. Basic Civil Works – Last Mile Fixed Network Telecommunications Pole b. Fixed Network Facilities - In-building and for Brownfield	21 October – 20 November 2024	12 November 2024

Source: *MCMC*
Figure 7.60: *List of Public Comment Exercises and Engagement Sessions in 2024*

Collaborations with Various Stakeholders

In line with its focus on expanding outreach in 2024, MTSFB established key collaborations with a range of national and international stakeholders across the telecommunications and technology industries. These strategic partnerships are outlined in Table 7.61.

MTSFB'S COLLABORATIONS, ACTIVITIES, AND KEY FOCUS AREAS

No.	Strategic Partners	Collaboration Activities and Key Scopes
1.	National Cyber Security Agency Malaysia (NACSA)	Memorandum of Understanding (MoU) exchange with the National Cyber Security Agency (NACSA) in conjunction with the NACSA Cybersecurity Summit 2024. The MoU covers the collaboration between the two parties on the development, awareness, promotion and adoption of the relevant technical codes and best practices, the development and implementation of cyber security policy and strategies, and the joint promotion of information and activities relating to cyber security, among others.
2.	Persatuan Penyedia Infrastruktur Telekomunikasi Malaysia (PPIT)	MoU exchange with Persatuan Penyedia Infrastruktur Telekomunikasi Malaysia (PPIT) with the goal of ensuring clear, forward-thinking and relevant standards that enable innovation while maintaining reliability, security, sustainability and interoperability of the infrastructure.
3.	Keysight Technologies Malaysia	Collaboratively organised the 5G Certification Workshop with Keysight Technologies, together with Global Certification Forum (GCF) and SIRIM Berhad which targeted audience including telecommunications professionals, network engineers, industry experts, regulatory bodies, technology vendors, and academia, all of whom are involved in the deployment, testing, and regulation of 5G networks.
4.	Smart Manufacturing Ecosystem	Engagement with Penang State Government for the Communication, Security and Governance Framework for Smart Manufacturing, along with panel discussion of related topics on smart manufacturing areas and digital transformation sharing by Malaysian subject matter experts. MTSFB collaborated with MIDA, Northern Corridor Economic Region (NCER), Digital Penang, Federation of Malaysian Manufacturers (FMM) Penang, Penang Skill Development Centre (PSDC) and a few manufacturers, such as Inari and Clarion, for the event and getting feedback for framework development. The framework will be refined and published in 2025.

Source: MCMC
Figure 7.61: MTSFB's Collaborations, Activities, and Key Focus Areas

World Telecommunication Standardisation Assembly 2024 (WTSA-24)

Malaysia, through MCMC and MTSFB, has actively contributed to ITU standardisation activities since WTSA 2012. In preparation for WTSA-24, Malaysia participated in regional meetings under the Asia-Pacific Telecommunity (APT) Preparatory Group for the ITU World Telecommunication Standardisation Assembly 2024 (APT WTSA-24) to develop APT Common Proposals (ACPs). These meetings provided a platform for APT members to collaborate and align positions on key issues and regional priorities.

Malaysia was honoured with the role of Vice Chair for Working Group 1: ITU-T Working Methods under APT WTSA-24, further underscoring its leadership in regional standardisation efforts.

APT submitted a total of 45 ACPs to WTSA-24 as contributions from the Asia-Pacific region. Malaysia actively participated in the development of 14 ACPs, serving as the lead country for three proposals and as an assisting country for 11. These contributions addressed critical areas such as cybersecurity, artificial intelligence, the metaverse, cloud-based event data technologies, and initiatives to nurture the next generation of standardisation experts.

During WTSA-24, the Malaysian delegation played a significant role across various working groups and committees, which collectively reviewed 252 contributions from ITU member states. The assembly concluded with the adoption of one modified recommendation, 44 amended resolutions, eight new resolutions, and the establishment of ITU-T Study Group 21 on technologies for multimedia, content delivery, and cable television.

In conclusion, WTSA-24 served as a valuable platform for Malaysia to engage with international counterparts, share best practices, and strengthen its position in global telecommunications standardisation efforts.

Chapter 8:

OUTLOOK

This chapter sets out the outlook for the C&M industry, as well as postal and courier industry. It highlights forecasts on emerging technologies, economic performance and sustainability initiatives within the industry.

TELECOMMUNICATIONS

MOBILE AND FIXED MARKET IN SOUTHEAST ASIA

Market Outlook and Drivers

The telecommunications industry in Southeast Asia has been facing various challenges. The rapid change of user behaviours, new technologies such as AI and 5G, growing competitions, increasing cyberattacks, sustainability needs, and regulatory requirements; continue to disrupt the industry. Besides, the telecom industry is facing economic uncertainties from the current geopolitical situations such as currency exchanges, interest rates, tariffs, and international trades.

Nevertheless, as shown in the figure below, 2024 was a pivotal year for the telecommunications industry in Southeast Asia1 as the market bounced back with a 0.6% YoY growth to US$46.7 billion after seeing a decline for two consecutive years in 2022 and 2023. As the market rebounds and settles down, the total revenue will be back in the uptrend with an estimated increase of 2.5% YoY to US$47.9 in 2025 and with a compound annual growth rate (CAGR) of 2.6% within the next five years to US$53.2 billion in 2029.

These growths are predominantly driven by continuous strong adoption of fixed broadband and mobile data services. The fixed broadband market is estimated to increase by 5.0% YoY in 2025 to US$11.5 billion and will continue to grow at a CAGR of 3.7% to US$13.2 billion in 2029. Fixed broadband adoption in Southeast Asia is still low, with household penetration at 43%. The market growth will be driven by higher service adoption as telecom operators expand their fiber coverage. Increased competition among fixed broadband operators also leads to competitive service pricing and hence lower the barriers to adoption for end users. This is shown by strong performance in the fixed broadband market as reported by operators such as AIS, PLDT, and Telkom Indonesia.

Meanwhile, as a mobile-first market, Southeast Asia will continue to see continuous growth in the mobile market. Mobile data revenue will be up by 5.2% YoY in 2025 to US$27.1 billion and will continue to increase to US$32.1 billion in 2029 with a 5.2% CAGR. Despite the high market maturity and penetration, the mobile data market growth will be fueled by the wider use of digital services and applications, data-intensive content such as video streaming and gaming, as well as fixed-line alternatives. However, the solid growth in fixed broadband and mobile data will be offset by the decline in legacy services such as fixed and mobile voice services.

SOUTHEAST ASIA TELECOM REVENUE 2022-2029 BY TYPE OF SERVICE (US$ BILLION)

	2022	2023	2024	2025	2026	2027	2028	2029	CAGR (2024-2029)	2025 Growth (YoY)
Mobile Data	24.1	24.9	25.8	27.1	28.4	29.6	30.9	32.1	4.5%	5.2%
Mobile Voice	9.5	8.5	7.8	7.3	7.1	6.8	6.6	6.4	-4.1%	-6.2%
Fixed Broadband	10.8	10.7	11.0	11.5	12.0	12.4	12.8	13.2	3.7%	5.0%
Fixed Voice	2.5	2.3	2.1	1.9	1.7	1.7	1.6	1.5	-5.8%	-10.1%
Total	**46.9**	**46.4**	**46.7**	**47.9**	**49.1**	**50.4**	**51.8**	**53.2**	**2.6%**	**2.5%**

Source: *GlobalData*
Figure 8.1: *Southeast Asia Telecom Revenue 2022-2029 by Type of Service (US$ billion)*

Malaysia Outlook

The telecommunications market in Malaysia is somewhat mature at higher service penetration rates compared to most other Southeast Asian countries. Nevertheless, the market is still growing faster than the overall region, with 3.0% YoY estimated growth in 2025 and 5.1% CAGR until 2029, as shown in the table below. In line with the regional trend, the growth in the Malaysian telecommunications market is driven by mobile data and fixed broadband services at CAGRs of 7.7% and 9.5%, respectively.

Malaysia's total mobile data service revenue is expected to increase from RM17.6 billion in 2024 to RM21.5 billion by 2029 with a CAGR of 4.1%. This projected increase in mobile data revenue is mainly driven by the increasing number of mobile internet subscriptions, the growing adoption of 5G services, and a rise in average revenue per user (ARPU) for mobile data.

Unlike the mobile market, fixed broadband adoption is relatively low in Malaysia. The market growth will be predominantly driven by the increase in service adoption amid the expansion in fibre coverage. The household fixed broadband (including fixed wireless access) penetration rate is expected to increase to 74% in 2029, as estimated by GlobalData. The higher adoption is also driven by the government's proactive approach and initiatives. For example, Pelan Jalinan Digital Negara (JENDELA) to increase broadband speed throughout the country and Pakej RAHMAH to further drive adoption in selected groups such as students and lower-income families.

Competition is increasing as operators broaden their initiatives and capabilities to protect and expand their market shares despite industry consolidation (CelcomDigi merger). The fixed-mobile convergence is progressing well in the market. Most major operators offer both fixed and mobile services and are integrating both services to provide seamless user experience. Mobile-focus operators such as CelcomDigi and Maxis are expanding their fibre coverage to narrow down the gap in fixed broadband while the fixed incumbent, Telekom Malaysia (TM) is strengthening its mobile portfolio to catch up with market leaders. Besides, the wholesale network approach provides a level playing field for all operators in the 5G market.

SOUTHEAST ASIA TELECOM SERVICE REVENUE 2022-2029 BY COUNTRY (US$ BILLION)

	2022	2023	2024	2025	2026	2027	2028	2029	CAGR (2024-2029)	2025 Growth (YoY)
Indonesia	13.6	13.8	13.8	14.3	15.0	15.6	16.2	16.8	4.0%	3.5%
Malaysia	7.0	7.0	7.0	7.4	7.6	7.8	8.0	8.2	3.0%	5.1%
The Philippines	7.6	7.5	7.5	8.0	8.3	8.6	8.9	9.2	2.0%	2.1%
Singapore	2.5	2.7	2.7	2.7	2.7	2.7	2.7	2.7	4.1%	6.4%
Thailand	9.7	9.0	9.1	8.8	8.8	8.8	8.8	8.9	0.2%	0.9%
Vietnam	6.3	6.4	6.5	6.7	6.9	7.0	7.2	7.4	-0.5%	-4.1%
Total	**46.9**	**46.4**	**46.7**	**47.9**	**49.1**	**50.4**	**51.8**	**53.2**	**2.6%**	**2.5%**

Source: *GlobalData*
Figure 8.2: *Southeast Asia Telecom Revenue 2022-2029 by Country (US$ billion)*
Malaysian companies include CelcomDigi, Maxis, Telekom Malaysia, TIME, U-Mobile, and other smaller providers including MVNOs.

MALAYSIA TELECOM SERVICE REVENUE 2022-2029 (RM BILLION)

	2022	2023	2024	2025	2026	2027	2028	2029	CAGR (2024-2029)	2025 Growth (YoY)
Mobile Data	16.2	16.9	17.6	18.4	19.1	19.9	20.7	21.5	4.1%	4.5%
Mobile Voice	6.8	6.4	6.0	5.9	5.8	5.7	5.6	5.5	-1.9%	-1.7%
Fixed Broadband	5.6	6.1	6.6	7.0	7.3	7.5	7.7	7.8	3.6%	6.1%
Fixed Voice	2.5	2.4	2.1	1.6	1.4	1.4	1.3	1.3	-9.6%	-22.3%
Total	**31.0**	**31.7**	**32.3**	**32.9**	**33.6**	**34.4**	**35.3**	**36.1**	**2.3%**	**1.9%**

Source: *GlobalData*
Figure 8.3: *Malaysia Telecom Revenue 2022-2029 by Type of Service (RM billion)*

5G

5G Development in Southeast Asia

5G has been the key driver for mobile operators not only to increase network capacity, but also to enhance their portfolio with new services as well as to gain a competitive advantage in the market. Southeast Asian operators were among the early operators in the world to launch 5G networks. Philippine operators launched their networks in 2019, only a few months after the launch of the first commercial 5G networks in South Korea and the US. This was followed by Singapore and Thailand in 2020, Indonesia and Malaysia in 2021, and Vietnam in 2024. Today, 5G networks in Southeast Asian countries have covered most populated areas, led by Singapore with 99% population coverage nationwide, Thailand with more than 95%, and Malaysia with over 82%. In Indonesia and the Philippines, while operators have deployed 5G in most cities nationwide, the coverage is still limited to key areas.

Operators have also been enhancing their 5G infrastructure by enabling new features and capabilities. The last couple of years saw most operators implemented 5G Standalone (5G SA) to achieve higher speeds and latency, improve security, and enable new features such as network slicing. 5G SA is crucial for industrial applications and, ultimately, as the foundational architecture for the next phase – 5G Advanced, as defined in the 3GPP Release 18 standards. 5G Advanced is the bridge for operators to evolve to the next generation of cellular technology, 6G. It supports new capabilities such as supports of extended reality (XR), RedCap, accurate positioning, AI and ML enhancements across the network stacks, and energy efficiency.

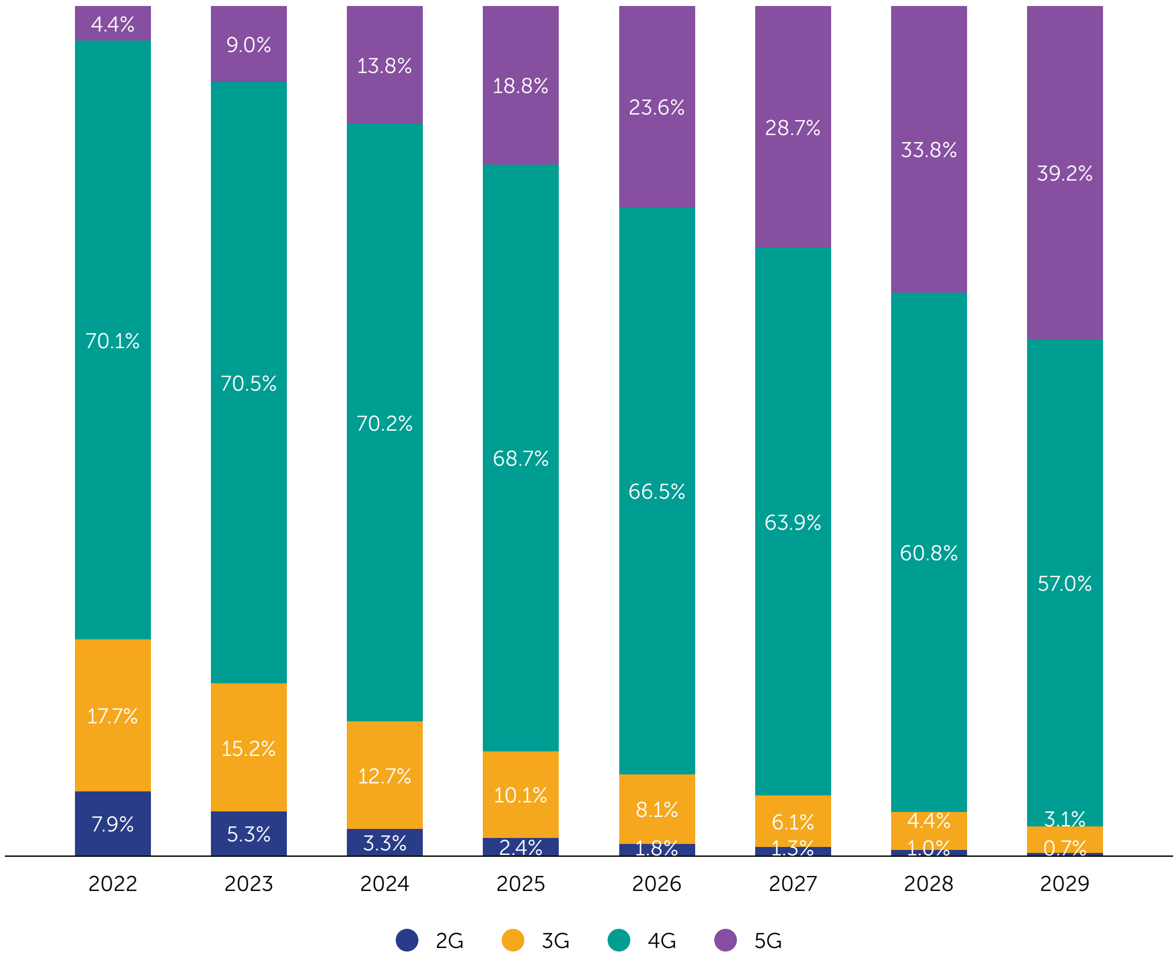
This can enable new applications and unlock wider use cases in IoT, public safety, connected vehicles, and many other industrial solutions.

2025 will see Southeast Asian entering the 5G Advanced phase. Singaporean operators are leading the region with Singtel and M1's deployments of their 5G Advanced in November 2024 and January 2025, respectively. Digital Nasional Berhad (DNB) announced its 5G Advanced initiatives in February 2025 while the Thailand regulator planned to award frequency bands for 5G Advanced in the first quarter of 2025.

The rapid development of 5G in Southeast Asia in coverage as well as network capabilities, is driving the adoption of the technology. 5G in the region has surpassed 100 million users in 2024, accounting for 13.8% of the total mobile subscribers, as shown in the figure below. The total 5G users is estimated to increase threefold within the next five years to 330.6 million (39.2% of the total subscribers) in 2029. This leads to a drastic increase in the overall 5G data traffic from 27.8 exabytes in 2024 to 44.5 exabytes in 2025 and to 143.3 exabytes in 2029.

Meanwhile, data traffic per user per month is expected to increase steadily from 15.4 GB/month in 2024 to 20.7 GB/month in 2025 and 38.8 GB/month in 2029. The growth is driven by wider coverage, broader ecosystem, device affordability, and new applications such as streaming, cloud gaming, and mixed reality. Enterprise use cases will also be a key growth engine for 5G.

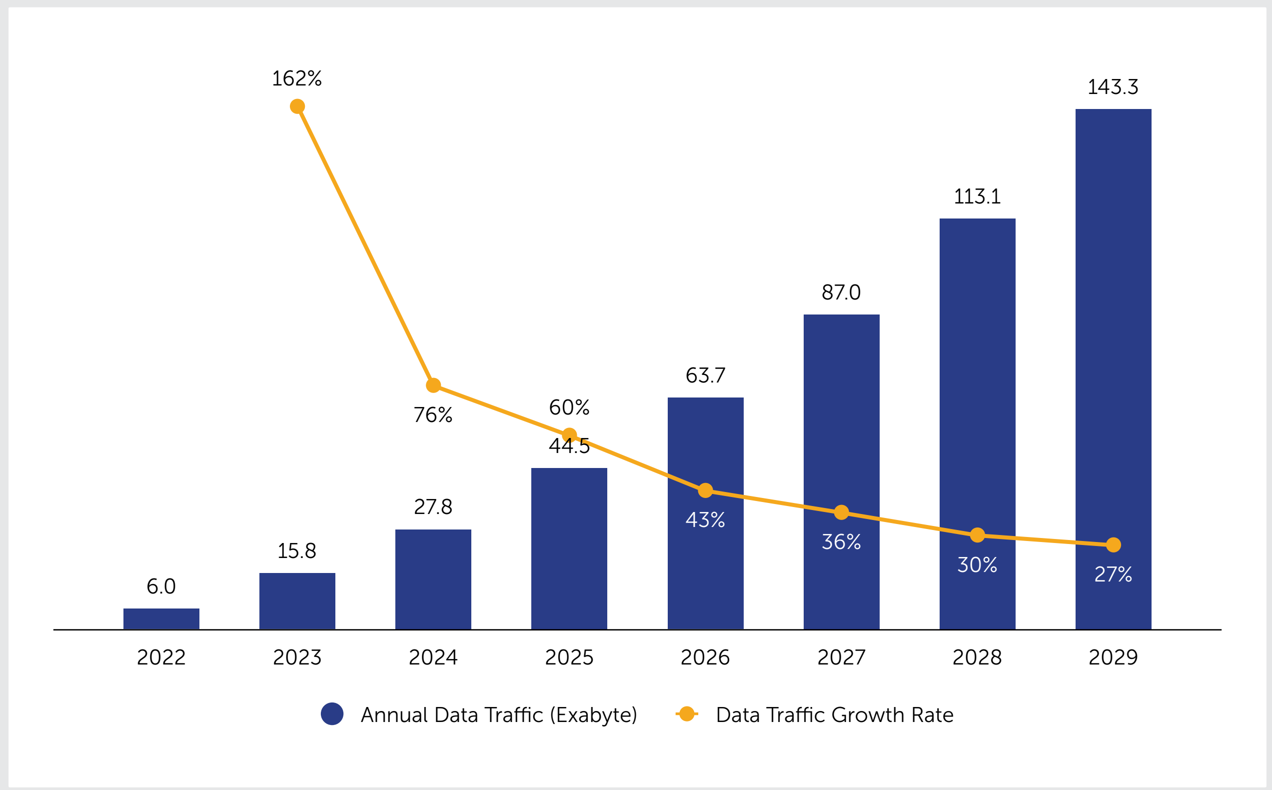
SOUTHEAST ASIA MOBILE SUBSCRIPTIONS BY GENERATION 2022-2029



	2022	2023	2024	2025	2026	2027	2028	2029
Mobile Data	63.8	39.9	25.5	19.0	14.3	10.8	8.2	6.3
Mobile Voice	142.7	115.1	99.2	80.2	65.4	49.9	36.8	25.9
Fixed Broadband	566.7	535.2	547.3	544.4	534.8	522.0	504.1	480.2
Fixed Voice	35.2	68.5	107.7	148.7	190.0	234.3	280.7	330.6
Total	**808.5**	**758.7**	**779.7**	**792.3**	**804.6**	**817.1**	**829.9**	**842.9**

Source: *GlobalData*
Figure 8.4: *Southeast Asia Mobile Subscriptions by Generations 2022-2029 (million user)*

SOUTHEAST ASIA MOBILE SUBSCRIPTIONS BY GENERATION 2022-2029



	2022	2023	2024	2025	2026	2027	2028	2029
5G Yearly Data Traffic (Exabyte)	6.0	15.8	27.8	44.5	63.7	87.0	113.1	143.3
Growth Rate	162.1%	76.0%	60.0%	43.1%	36.4%	30.1%	26.7%	162.1%

8

Source: *GlobalData*
Figure 8.5: *Southeast Asia 5G Mobile Data Traffic 2022-2029*

Enterprise 5G

The enterprise segment is believed to be the key driver for operators to monetise their 5G infrastructure. Operators offer 5G connectivity services to complement their network portfolio such as fixed wireless access, fiber back-up, SD-WAN underlay, and private 5G. There are also wider collaborations between operators, technology vendors, industry players, and enterprises to co-develop industrial solutions like smart factory, smart cities, and connected ports and airports, although most initiatives are still in the proof-of-concept (POC) and pilot stages.

GlobalData research shows that 39% of global enterprise 5G deployments are in the government sector, 17% in transport and logistics, 14% in manufacturing, 4% in energy and utilities, while the rest are scattered across other sectors. These four industries (government, transport and logistics, manufacturing, and energy and utilities) are the early adopters of enterprise 5G driven by tangible use cases. For example, government agencies and city councils are leveraging 5G to enable bandwidth-intensive, secure and dedicated network in smart cities, public safety and critical communications applications. Transport and logistics operators are implementing 5G-enabled connected vehicles, drones, smart ports and airports to enhance their operational efficiencies. Manufacturers are using 5G for process automation, remote operations, and robotics as part of their IT-OT convergence initiatives. These industries are also the major sectors contributing to the overall gross domestic product (GDP) of Southeast Asian countries. Early deployments in Southeast Asia include 5G smart factory by AIS in Thailand, remote inspections and surveillance at Keppel Bay by M1 in Singapore, and private networks at the Petronas liquified natural gas (LNG) complex by Telekom Malaysia.

Private 5G is gaining traction and shows high potential in the market. Singaporean and Thailand operators have implemented various private 5G networks across industries. Malaysian operators are collaborating with major companies across industries to implement private 5G networks. Globe and PLDT in the Philippines launched respective private 5G network solutions. Operators will also begin to commercialise their trials and POCs from previous years. GlobalData research shows that 77% of Southeast Asian enterprises are considering and/or investing in the technology. This will drive the market to grow by 10.5% YoY to US$56 million in 2025.

Besides, Singtel launched Paragon, a 5G orchestration platform that integrates 5G capabilities as well as other technology stacks such as cloud, edge, security, APIs, and third-party applications. Singtel's Paragon is also used by several other operators as part of their enterprise 5G offerings including AIS in Thailand and Maxis in Malaysia.

Malaysia 5G Outlook

The first 5G wholesale network by DNB is progressing well, covering over 80% of the country's population. DNB has also enabled 5G Advanced in February 2025. In November 2024, Malaysia announced another significant move by awarding U-Mobile, the third largest mobile operator to implement the country's second wholesale network. U-Mobile is partnering with Huawei and ZTE to deploy the 5G network and plans to complete its network rollout by the middle of 2026.

Nonetheless, the overall 5G subscribers and usage in Malaysia will continue to increase steadily from 2025 until 2029, consistent with the trends in Southeast Asia. 5G subscribers in Malaysia are estimated to reach 46.9 million in 2029. The high adoption will largely be driven by market maturity and wider device availability, fueled by nationwide coverage as well as competitive plans and innovative enterprise solutions offered by operators.

The enterprise segment will continue to be the focus for operators in 2025 and onward. There are various industry collaborations through operator-led initiatives, such as Maxis 5G Alliance, CelcomDigi AiX, and Telekom Malaysia 5G Sphere and Enterprise 5G Labs. Operators will begin to commercialise their use cases mainly in high-growth industries such as government, manufacturing, and oil and gas. Operators will also continue to broaden their partner ecosystem not only with technology vendors, but also with industry players to strengthen IT-OT convergence propositions and enhance their vertical offerings. Besides, 2025 will also see wider integration of 5G with operators' existing enterprise solutions such as RedCap and industrial solutions in IoT and edge computing in cloud.

TELECOM ENTERPRISE ICT SERVICES

As the telecommunications market matures, operators are looking for new opportunities to drive revenues. With strong infrastructure capabilities combined with existing relationships with enterprises, telecom operators are developing adjacent enterprise ICT solutions to expand revenue streams while retaining the competitive advantage in networks. This includes managed cloud services, cloud interconnects, managed networks including local area network (LAN), managed security services, secure access service edge (SASE), and industrial IoT solutions. These markets are growing solidly driven by enterprise digital transformations. As shown in the table below, the addressable telecom enterprise ICT market in Malaysia is expected to increase by 18.4% to RM78.1 billion in 2025 and will continue to grow at a double-digit CAGR of 18.9% to RM133.9 billion in 2028. This promising opportunity drives the need for telecom operators to transform beyond connectivity to become a technology company, or commonly referred to as a 'techco'.

MALAYSIA ENTERPRISE TELECOM ICT MARKET 2022-2028 (RM BILLION)

	2022	2023	2024	2025	2026	2027	2028	CAGR (2023-2028)
Cloud	8.7	11.1	13.7	17.1	21.4	27.1	34.6	25.6%
IoT	13.5	17.0	21.0	25.9	32.0	39.3	48.3	23.2%
Networking	6.4	7.2	7.9	8.7	9.4	10.2	11.1	9.0%
Enterprise Applications	6.2	7.0	7.6	8.4	9.2	10.0	10.8	9.3%
Communications and Collaboration	5.0	5.4	5.6	6.0	6.6	7.5	8.5	9.5%
Security	2.8	3.4	4.1	4.8	5.8	6.9	8.2	19.0%
Data and Analytics	1.6	2.0	2.4	2.9	3.4	4.1	4.9	20.0%
Data Center and Hosting	1.4	1.7	1.9	2.1	2.4	2.7	3.1	13.0%
Mobility	0.8	1.0	1.3	1.5	1.8	2.2	2.7	20.4%
Edge Computing	0.3	0.4	0.5	0.7	0.9	1.2	1.6	35.2%
Total	**46.6**	**56.2**	**66.0**	**78.1**	**93.0**	**111.3**	**133.9**	**18.9%**

Source: *GlobalData*
Figure 8.6: *Malaysia Enterprise Telecom ICT Market 2022-2028 (RM billion)*

Most operators are undergoing telco-techco transformation, not only to increase operational agility and efficiency through cloud migration and AI/Gen-AI use cases, but also to enhance their enterprise products and solutions by expanding their partner ecosystem and building platform and service capabilities. For example, Philippines Globe Telecom migrated their customer portals and online marketplace to AWS to increase scalability, enhance user experience, and gain deeper customer views through analytics services. Indosat Ooredoo Hutchinson in Indonesia partners with Nokia and NVIDIA to deploy AI-RAN to improve network scalability and performance as well as to enable edge computing.

For external use cases – products and services – AIS is working with hundreds of partners across multiple industries to strengthen its industrial solutions while Singtel developed several platform-based solutions for 5G (Paragon), cloud (CUBE), and AI (RE:AI) for enterprises. Several operators such as CelcomDigi, Maxis, and Starhub made acquisitions of IT service companies to expand their service capabilities. The revenue proportion of enterprise ICT services is still relatively small for most operators compared to traditional telecom business. However, this high-growth opportunity of this segment can drive operators' overall business, especially to cushion the decline in the legacy services.

SUSTAINABILITY

Sustainability has become a crucial part of any organisation, from service providers to technology vendors and enterprises, as well as the consumer. For operators, sustainability is redefining network infrastructure, product development, and go-to-market initiatives. Operators are increasingly using renewable energy and carbon trading to reduce their greenhouse gas (GHG emission) and to achieve net-zero carbon emissions goals.

Most operators globally have set their carbon neutral goals by 2050, while leading players have their targets much earlier – AT&T in 2035, Vodafone and Orange in 2040, and Singtel in 2045. The use of renewable energy has become standard practice. Some operators take further steps to reduce their carbon emissions with green network solutions, the use of electric vehicles in their operations, and AI technologies. Globe Telecom Philippines deployed Nokia AVA for Energy Efficiency SaaS, while Singtel partnered with Ericsson to implement energy-efficient AIR3269 radios. Besides, sustainability is one of the key features of 5G Advanced technologies.

Leading global operators are also integrating sustainability elements into their offerings such as carbon accounting tools and sustainability-driven IoT solutions. Vodafone developed 'Carbon Enablement Calculators' to help customers understand carbon savings, while Orange Business offers Smart Eco-Energy to optimise the energy consumption of its customers' buildings.

Sustainability is still in the early stages but progressing well in Malaysia. Operators such as CelcomDigi, Maxis, and Telekom Malaysia have set their net-zero carbon emissions goals by 2050. For instance, Telekom Malaysia aims to reduce carbon emission by 45% by 2030. Meanwhile, Maxis has also implemented carbon emission reduction initiative via solar systems for its rural sites across the country to minimise the need for generator sets. Additionally, the provider plans to replace all its field operation fleets with electric vehicles by 2028. Malaysian operators have also achieved various industry certifications and ratings. Telekom Malaysia scored 46/100 on S&P Global Corporate Sustainability Assessment, achieved CDP Rating of B, FTSE Russel 3.6, and FTSE4Good Bursa Malaysia 4 out of 4 stars.

In 2025, Malaysian operators are expected to drive broader initiatives aligned with their sustainability targets. Deploying 5G Advanced will help operators minimise the increase in energy consumption amid the rapid growth of data demand. Operators will also increase their investment in sustainability to have a broader use of renewable energy at offices, data centers, and network sites. There will also be more carbon trading to offset the continuous increase in energy usage. Further, operators will integrate sustainability into their portfolios, such as offering carbon calculators in their cloud, network, and IoT services for their customers.

CONTENT SERVICES

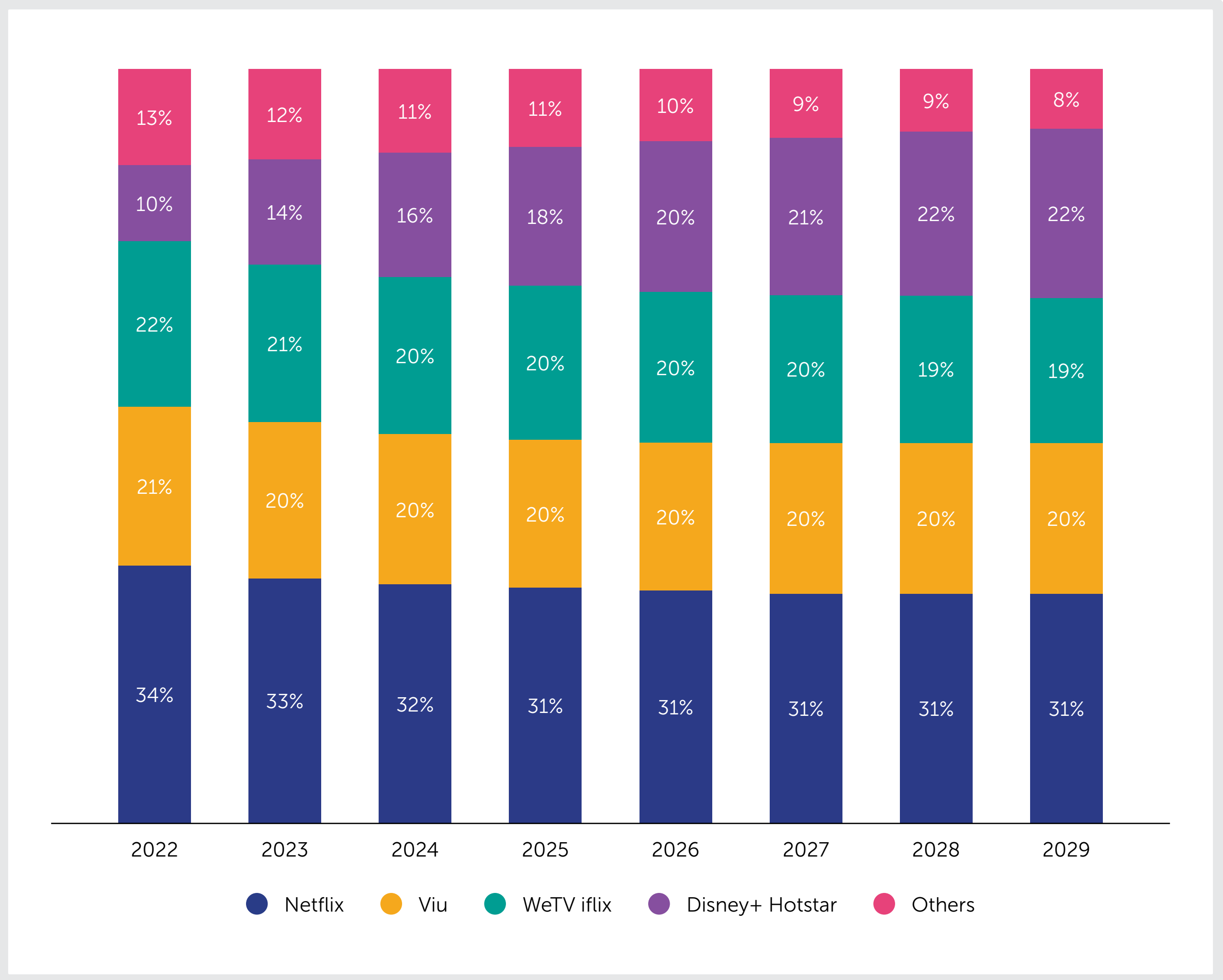
KEY TRENDS

In line with global and regional trends, the cord-cutting phenomenon continues to shape the content industry in Malaysia. The market evolves as the demand is shifting from pay TV to video-on-demand (VOD) services. Pay TV subscriptions are estimated to decline steadily at -2.5% CAGR to 5.4 million users in 2029. Revenue is expected to drop steeper at -6.3% CAGR due to price erosion, lower demand for premium packages and alternative services. Nevertheless, the pay TV market will remain significant in the country, driven by vernacular content and exclusive sports programmes offered by traditional providers. Astro is leading the market and is expected to retain its position within the forecast period until 2029.

Meanwhile, VOD subscriptions are estimated to reach 5.3 million in 2029, and surpass pay TV subscriptions within the next five years. The growth is driven by extensive content catalogs, flexibility in viewing (anytime, anywhere), flexibility in subscriptions (e.g., no lock-in contracts), and lower subscription costs. There is a variety of services available from global content providers such as Netflix, Disney+, Viu, iQIYI, WeTV Iflix, and Apple TV. Netflix is estimated to retain its lead in subscriber share until 2029 as one of the early VOD providers in the country. This is followed by Viu and WeTV iflix, which are known for Asian content, and Disney+ Hotstar (Western and Indian content).

There is also a broader partnership between domestic telecom operators and content providers to offer multi-play services (e.g., bundles of fixed broadband, mobile, and content services). For example, Astro and Telekom Malaysia offer Netflix, Disney+ Hotstar, and Viu as add-ons to their services. These bundled services attract subscribers through greater values and seamless onboarding like integrated billing and support. Additionally, wider broadband availability enables service providers to reach more users throughout the country.

MALAYSIA VIDEO ON DEMAND SUBSCRIPTION SHARE 2022-2029 (%)



Source: *GlobalData*
Figure 8.7: *Malaysia Video on Demand Subscription Share 2022-2029 (%)*

MARKET OUTLOOK

In 2025, service and content availability, digital experience, and personalisation will continue to drive VOD market in Malaysia. Emerging technologies such as AI are expected to influence user behaviour and market demand. The technology is still in the early phase, but rapid advancements in AI and gen-AI have accelerated the development of AI-generated videos. Not only are there various video editing tools available in the market, but also an increasing number of video generation models, such as the recent release of Alibaba Cloud's Qwen and Google's Veo. Fable Studio, a startup media company, launched Showrunner, a streaming platform that allows users to generate leveraging AI and share their content with other users. Besides, there is a growing trend of interactive content, including shoppable videos.

While companies like Netflix, Viu, WeTV iflix and Disney+ Hotstar are gaining footholds in Malaysia, the VOD market is still developing, driven by other providers such as Amazon Prime Video, HBO Max, Apple TV, and YouTube. These are the major global players with comprehensive content and strong capabilities but were late to the local market. Local providers are also developing and enhancing their respective VOD services such as Astro's Sooka and Tonton.

SUSTAINABILITY

Content providers' GHG emission is largely driven by their operations such as data centers, broadcast, and operations centers. A streaming service emits approximately 55 grams of CO2 per hour. Nonetheless, global players are ahead in their sustainability journey. Netflix has committed to halve its carbon emissions by 2030 while Disney aims to achieve net-zero GHG emissions from Scope 1 and 2 by 2030.

In Malaysia, with a commitment to reach carbon neutrality by 2040, Astro has reduced its Scope 1 and 2 GHG emission by 2.5% in FY2025 (ending 31 January 2025). This is driven by initiatives and programmes such as workspace consolidation and measures to prevent refrigerant leakage in cooling systems. Astro has also increased the use of renewable energy, generating 1.6 million kWh from solar panels, equivalent to 7.8% of total consumption at its main broadcast and operation center.

Another key domestic player, Media Prima, started its sustainability journey in 2024 by measuring its GHG emissions and developing its roadmap to reduce emissions. However, there are already ongoing initiatives such as 25% reduction of energy consumption through the use of energy-saving LED modules.

POSTAL AND COURIER

KEY TRENDS

The postal, courier and express industry in Malaysia increased drastically during the Covid pandemic and the growth is forecasted to reach RM9.53 billion (USD2.24 billion) by 2030, with a 6.0% CAGR from 2025 to 2030[1]. The e-commerce market in Malaysia is mature, driven by a high adoption of Internet and online payment services, as well as shift in consumer behaviours. Besides, there is a wider availability of marketplace platforms such as Shopee, Lazada, and Temu. There is also a growing competition among the logistics providers. The local incumbent, Pos Malaysia, recorded solid growth in parcel traffic despite a steep decline in the number of letters. Other global (e.g., DHL, FedEx), regional (Ninja Van), and local providers such as GDEX, City-Link Express, are also seeing increases in their parcel traffic and are expanding their infrastructure footprint. The marketplace platform providers such as Shopee and Lazada have also expanded vertically to provide logistics as part of their offerings. Further, the government is playing key roles in driving the e-commerce market through initiatives such as Pelan Accelerator Kurier Negara (PAKEJ) and improved logistics infrastructure.

MARKET OUTLOOK

Consumer behaviour will continue to shift, driven by higher customer expectations such as same-day and next-day delivery and delivery flexibility (e.g., at a specific time and location). This is driving service providers to further innovate to meet the rising market demand. 2025 will also see wider adoption of digital technologies such as IoT-enabled real-time tracking, AI-powered route optimisation, delivery drones, and warehouse automation. Besides, cybersecurity is becoming more important technology for postal and courier providers in protecting customers' sensitive data such as contact details and addresses. For example, China Unicom, YunHuan Technology, and ZTE launched drone-based blood delivery in a city in China leveraging 5G-A. The deployment has reduced delivery times from 40 minutes to 15 minutes, reducing wastage, driving efficiency and cost savings. In Malaysia, Pos Malaysia leverages cloud, analytics, AI, and IoT to enhance its estimated time of arrival (ETA). The company achieved 37% better ETA accuracy and 70% higher operational efficiency.

SUSTAINABILITY

The sustainability initiatives in the postal and courier industry in Malaysia are still new but progressing well. Carbon emissions are largely from delivery fleets but are also contributed by operational hubs and warehouses. Pos Malaysia is taking the lead in this space with the plan to reduce 50% in Scope 1 and 2 emissions by 2030 (2021 baseline) and achieve net-zero emissions by 2050. Pos Malaysia's key initiatives include using electric vehicles (EV) for last-mile delivery. It has deployed over 250 EVs and plans to expand its EV adoption for last-mile delivery to 28% by 2025 and 100% by 2030. Besides, Pos Malaysia is also part of the International Post Corporation (IPC) Sustainability Measurement and Management System and has been assessed according to the FTSE4Good criteria.

GDEX has also been driving sustainability initiatives for several years. It uses electric motorcycles for last-mile delivery in urban locations in Klang Valley, installed solar systems at its headquarters and hubs to cover 15% of the energy consumption at respective locations, and uses sustainable packaging. Meanwhile, City-Link Express announced its ESG plans last year, including the use of EVs in its delivery fleet.

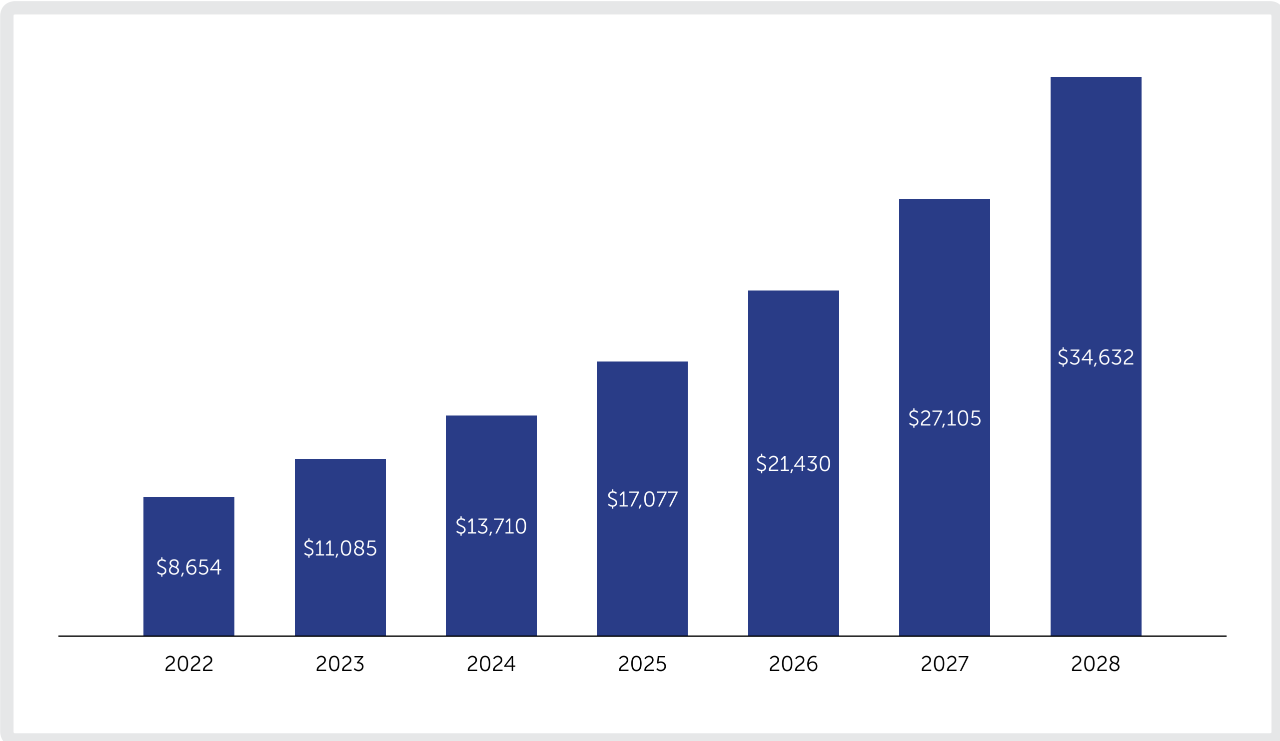
[1] *Mordor Intelligence: Malaysia Courier, Express and Parcel Market Analysis. The market overview includes Pos Malaysia, DHL Group, FedEx, J&T Express and Ninja Van.*

CLOUD

KEY TRENDS

The cloud market in Malaysia is still growing strongly driven by increased demand from enterprises as well as higher competition from global players such as Alibaba Cloud, AWS, Google Cloud, and Microsoft. Enterprises continue to migrate data and workloads from traditional on-premises data centers to hosted environments, to achieve higher agility, scalability, and flexibility within IT as well as to address business needs such as accelerating time-to-market, enhancing operational efficiencies, and reducing costs. GlobalData study shows that the average workload in the cloud has gone up from 23% in 2020 to over 50% in 2024. Besides, hyperscalers' expansion in the country is accelerating the local cloud development through their wider service catalog, more advanced solutions, and broader partner ecosystem. This is driving the Malaysian cloud market to increase from RM13.7 billion in 2024 to RM34.6 billion in 2028 at a CAGR of 25.6%, as shown below.

MALAYSIA CLOUD MARKET (RM MILLION) 2022-2028



Source: *GlobalData*
Figure 8.8: *Malaysia Cloud Market (RM million) 2022-2028*

MARKET OUTLOOK

As adoption increases, data and applications will be hosted across multiple locations, environments, and providers. This often leads to challenges such as complexity in managing workload across multiple environments/providers, orchestrating different applications, vendor lock-ins, data compliance, security, operational efficiency, and cost savings. Hence, 2025 will see an increased focus on multi-cloud and FinOps solutions to address these challenges. GlobalData's study shows that over 60% of Malaysian enterprises are prioritising managed cloud services and management platform within the next two years.

Besides, cloud use cases are moving up the stack from hosting services to enablement platforms for business applications, industrial solutions, and digital transformation. There is a growing demand for industry cloud driven by specific needs across different verticals. For example, sovereign cloud addresses data residency for industries like government and BFSI, and edge computing for heavy industries such as manufacturing, energy, and construction.

AI is another key driving factor for cloud. Database and storage infrastructure are crucial for model training and inferencing, and hence, to ensure successful AI deployments. There is also a higher demand for cloud-based AI development platforms and cloud-based AI applications. Cloud providers are taking the lead in this space with their end-to-end solutions across the stacks – from the infrastructure layer to development tools, models, and applications.

SUSTAINABILITY

Domestic cloud providers such as Telekom Malaysia and Maxis have aligned their net-zero carbon emissions goals with the country's target, by 2050. There are various initiatives to lower carbon emissions. For example, Telekom Malaysia's higher use of renewable energy (40%) and energy-efficient cooling systems in its cloud data centers. Its data centers have Green Building Index (GBI) certification and have Power Usage Effectiveness (PUE) of between 1.6 to 1.8. Other local providers such as AVM Cloud, IGS, and Exabytes have integrated sustainability into their offerings, but there are still limited initiatives in reducing internal emissions. Meanwhile, global cloud providers such as AWS, Google, and Microsoft have advanced sustainability targets and initiatives. For example, Amazon and Google have net-zero goals by 2030 through their plans to use clean energy, carbon trading, as well as sustainable solutions. Amazon has met its 100% renewable energy goal in 2023, seven years ahead of its initial target in 2030. Its global facilities had a PUE rating below 1.15 in 2023.

Cloud can also help enterprises with their ESG initiatives. Migrating to cloud reduces the need for on-premises infrastructure, which translates to lower Scope 2 emissions. Cloud providers also often have more advanced power management and highly efficient facilities compared to in-house data centers. AWS and Google Cloud claimed that their cloud services are 4.1 and 1.8 times more energy efficient than on-premises. Furthermore, cloud providers are increasingly adding carbon accounting features in their offerings to provide estimated emissions associated with their cloud usage.

APPENDIX 1

Note	
1.	Where a table is not accompanied by a source acknowledgement, that table carries data that emanated solely from the Malaysian Communications and Multimedia Commission (MCMC).
2.	Preliminary figures are italicised.
3.	Revised figures are underlined.
4.	Figures presented in tables are as at the end of the period. Hence the penetration rate for a given year is calculated using the number of subscriptions and estimated population as at the end of the year. This is different from the Malaysian demographic practice of using mid-year population as the the population for that year. If the practices need to be syncronised to the demographic norm, then the penetration rates as at the end of June of that year must be used.
5.	The added total may differ due to rounding.
6.	Wilayah Persekutuan includes Federal Territory Kuala Lumpur, Federal Territory Labuan and Federal Territory Putrajaya.

SYMBOLS AND ABBREVIATIONS	
DOSM	Department of Statistics, Malaysia
MCMC	Malaysian Communications and Multimedia Commission

MALAYSIA BASIC INDICATORS

Year	Quarter	Population	Households	Domestic Product (GDP)		Consumer Price Index (CPI)
				Current prices	Constant prices	
		(million)	('000)	(RM billion)	(RM billion)	
Note		a	b		c	d
2022	4	33.0	8,062.1	<u>468.2</u>	<u>398.7</u>	128.9
2023	1	33.2	8,099.2	<u>443.3</u>	<u>381.4</u>	129.7
	2	33.4	8,152.4	<u>439.7</u>	<u>378.4</u>	130.2
	3	33.5	8,170.0	<u>463.2</u>	<u>397.9</u>	130.7
	4	33.7	8,223.8	<u>476.7</u>	<u>410.3</u>	131.0
2024	1	34.0	8,942.3	465.0	397.5	131.9
	2	34.1	8,962.8	472.5	400.7	132.7
	3	34.1	8,976.9	490.7	419.2	133.2
	4	34.2	8,988.8	502.9	430.7	133.4

Source: *DOSM, MCMC*

Explanatory notes:

a. *Population projections as at end of period, based on census 2020.*
b. *Number of households derived by dividing populations by average household size. A household consists of related and/or unrelated persons who usually live together and make common provisions for food and other essentials of living.*
c. *Base year is 2015.*
d. *Base year is 2010. The CPI reported against a quarter, refers to the average index for the period spanning 1st January to the end of that quarter.*

PENETRATION RATES AT A GLANCE (%)

Year	Quarter	Fixed broadband per 100 premises	Mobile broadband per 100 inhabitants	Mobile cellular per 100 inhabitants	Pay TV per 100 households
Note		a	b	c	d
2022	4	47.6	131.0	145.3	80.6
2023	1	48.6	132.0	146.7	79.6
	2	49.1	133.3	148.1	78.5
	3	49.9	133.8	148.6	77.3
	4	50.6	134.5	148.7	76.4
2024	1	46.9	132.1	146.7	68.7
	2	47.5	132.5	147.3	66.9
	3	48.2	132.0	146.4	66.0
	4	48.7	131.1	145.4	65.4

Explanatory notes:

a. *The fixed broadband penetration rate per 100 premises is calculated by dividing the total fixed broadband by total number of premises and multiplying by 100. Number of premises include household and non-household. Public Wi-Fi subscriptions are not taken into account. Only subscriptions with speed of 1Mbps and above is taken into account for calculation.*

b. *The mobile broadband penetration rate per 100 inhabitants is calculated by dividing the total mobile broadband by total number of population and multiplying by 100. A penetration rate over 100% can occur because of multiple subscriptions.*

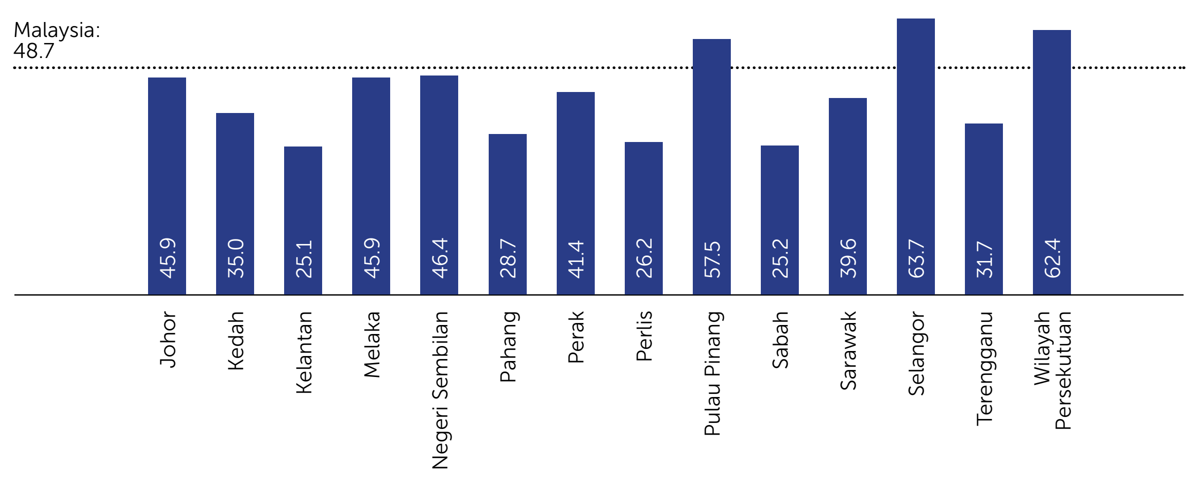
c. *The mobile cellular penetration rate refers to the total subscriptions divided by total number of population and multiplied by 100. A penetration rate over 100% can occur because of multiple subscriptions.*

d. *The pay TV penetration rate per 100 households is calculated by dividing the number of household subscriptions by the number of households and multiplied by 100.*

FIXED BROADBAND PENETRATION RATE PER 100 PREMISES BY STATE (%)

Year	2022	2023				2024			
Quarter	4	1	2	3	4	1	2	3	4
Note									
State									
Johor	42.0	43.2	44.3	45.3	46.2	43.6	44.4	45.2	45.9
Kedah	33.4	34.5	35.7	36.3	36.8	33.8	34.2	34.8	35.0
Kelantan	23.6	24.8	25.5	26.0	26.4	23.5	24.0	24.8	25.1
Melaka	46.0	47.0	47.7	48.3	48.8	44.4	44.9	45.6	45.9
Negeri Sembilan	42.0	43.2	44.6	45.6	46.2	44.1	44.9	45.8	46.4
Pahang	29.9	30.9	31.7	32.2	32.6	27.7	28.1	28.6	28.7
Perak	39.0	40.0	41.1	41.6	41.8	40.0	40.5	41.0	41.4
Perlis	30.0	31.0	31.9	32.9	33.5	25.7	25.9	26.1	26.2
Pulau Pinang	56.7	57.6	58.6	59.5	60.5	55.9	56.7	57.1	57.5
Sabah	28.8	29.7	27.5	29.7	29.4	24.2	24.4	24.8	25.2
Sarawak	38.0	38.9	39.7	40.4	40.6	38.3	38.7	39.3	39.6
Selangor	61.2	61.6	62.1	62.5	63.0	62.8	62.9	63.4	63.7
Terengganu	34.2	35.3	35.8	36.3	37.2	30.7	30.8	31.4	31.7
Wilayah Persekutuan	58.7	59.8	60.0	60.9	60.5	60.1	60.8	61.5	62.4
Malaysia	**47.6**	**48.6**	**49.1**	**49.9**	**50.6**	**46.9**	**47.5**	**48.2**	**48.7**

FIXED BROADBAND PENETRATION RATE PER 100 PREMISES BY STATE, 2024 (%)



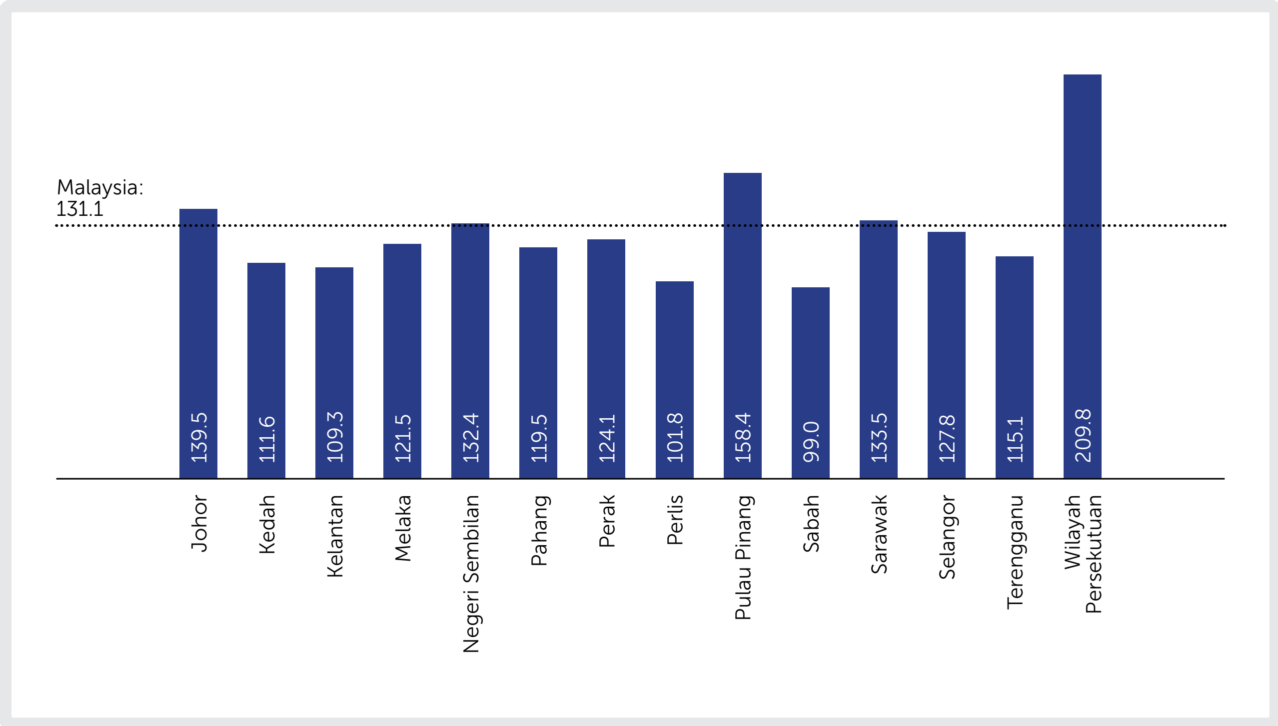
Explanatory notes:

The fixed broadband penetration rate per 100 premises is calculated by dividing the total fixed broadband by total number of premises and multiplying by 100. Number of premises include household and non-household. Public Wi-Fi subscriptions are not taken into account. Only subscriptions with speed of 1Mbps and above is taken into account for calculation.

MOBILE BROADBAND PENETRATION RATE PER 100 INHABITANTS BY STATE (%)

Year	2022	2023				2024			
Quarter	4	1	2	3	4	1	2	3	4
Note									
State									
Johor	139.0	143.7	143.2	144.1	144.1	140.0	142.0	138.6	139.5
Kedah	112.6	114.2	118.5	118.6	116.3	114.6	111.9	111.5	111.6
Kelantan	113.0	116.1	115.6	115.9	115.2	112.5	111.2	109.1	109.3
Melaka	121.9	113.7	125.2	120.1	119.1	114.7	116.1	117.7	121.5
Negeri Sembilan	144.9	144.1	139.5	143.9	143.5	143.5	137.1	135.4	132.4
Pahang	121.3	120.5	122.0	123.2	126.2	123.3	119.5	119.2	119.5
Perak	123.6	122.9	126.1	126.9	128.1	127.6	127.2	125.3	124.1
Perlis	107.9	104.5	105.0	103.0	107.4	103.8	101.6	101.1	101.8
Pulau Pinang	163.1	166.4	169.0	161.4	164.4	158.2	163.8	164.5	158.4
Sabah	100.7	100.2	96.5	97.8	98.9	96.9	97.7	98.3	99.0
Sarawak	129.0	128.3	128.1	129.4	131.4	129.8	130.2	131.7	133.5
Selangor	123.4	126.1	129.7	131.0	132.2	131.5	132.4	130.1	127.8
Terengganu	115.7	114.6	118.6	121.1	121.6	117.2	116.5	116.3	115.1
Wilayah Persekutuan	206.6	206.7	207.7	209.9	205.7	202.8	207.6	214.5	209.8
Malaysia	**131.0**	**132.0**	**133.3**	**133.8**	**134.5**	**132.1**	**132.5**	**132.0**	**131.1**

MOBILE BROADBAND PENETRATION RATE PER 100 INHABITANTS BY STATE, 2024 (%)



Explanatory notes:

The mobile broadband penetration rate per 100 inhabitants is calculated by dividing the total mobile broadband by total number of population and multiplying by 100. A penetration rate over 100% can occur because of multiple subscriptions.

NUMBER OF BROADBAND SUBSCRIPTIONS

Year	Quarter	Fixed broadband (million)	Mobile broadband (million)	Total (million)	Fixed broadband penetration rate per 100 premises (%)	Mobile broadband penetration rate per 100 inhabitants (%)
Note		a	b		c	d
2022	4	4.22	43.24	47.46	47.6	131.0
2023	1	4.33	43.77	48.10	48.6	132.0
	2	4.40	44.49	48.89	49.1	133.3
	3	4.49	44.77	49.26	49.9	133.8
	4	4.57	45.33	49.91	50.6	134.5
2024	1	4.62	44.89	49.51	46.9	132.1
	2	4.68	45.13	49.81	47.5	132.5
	3	4.76	45.02	49.78	48.2	132.0
	4	4.81	44.78	49.60	48.7	131.1

Explanatory notes:

The added total may differ due to rounding

a. Includes ASDL, SDSL, VDSL, Satellite, FTTH, Fixed wireless and GigaWire.
b. Includes prepaid, postpaid, and Pay Per Use.
c. The fixed broadband penetration rate per 100 premises is calculated by dividing the total fixed broadband by total number of premises and multiplying by 100. Number of premises include household and non-household. Public Wi-Fi subscriptions are not taken into account. Only subscriptions with speed of 1Mbps and above is taken into account for calculation.
d. The mobile broadband penetration rate per 100 inhabitants is calculated by dividing the total mobile broadband by total number of population and multiplying by 100. A penetration rate over 100% can occur because of multiple subscriptions.

NUMBER OF FIXED BROADBAND SUBSCRIPTIONS BY SPEED RANGE

Year	Quarter	1 Mbit/s - 30 Mbit/s	30 Mbit/s - 50 Mbit/s	50 Mbit/s - 100 Mbit/s	100 Mbit/s - 500 Mbit/s	500 Mbit/s - 1 Gbit/s	≥ 1 Gbit/s
		(million)					
Note							
2022	4	0.10	1.32	0.11	2.04	0.64	0.02
2023	1	0.08	1.34	0.12	2.09	0.67	0.02
	2	0.07	1.34	0.14	2.15	0.68	0.02
	3	0.06	1.34	0.15	2.20	0.72	0.02
	4	0.05	0.38	0.11	2.72	1.30	0.02
2024	1	0.04	0.34	0.11	2.75	1.35	0.02
	2	0.04	0.32	0.12	2.81	1.37	0.03
	3	0.03	0.28	0.12	2.89	1.41	0.03
	4	0.03	0.26	0.12	2.93	1.45	0.04

Explanatory notes:

The added total may differ due to rounding.
Each speed range includes the lower bound speed; i.e. 1 Mbit/s - 10 Mbit/s means 1 Mbit/s to less than 10 Mbit/s.

NUMBER OF FIXED BROADBAND SUBSCRIPTIONS BY TECHNOLOGY

Year	Quarter	Fibre optic	Copper	Others
		(million)		
Note		a	b	c
2022	4	4.12	0.07	0.03
2023	1	4.25	0.05	0.03
	2	4.33	0.04	0.03
	3	4.43	0.04	0.03
	4	4.51	0.03	0.03
2024	1	4.56	0.03	0.04
	2	4.62	0.02	0.04
	3	4.69	0.02	0.05
	4	4.75	0.02	0.05

Explanatory notes:

The added total may differ due to rounding

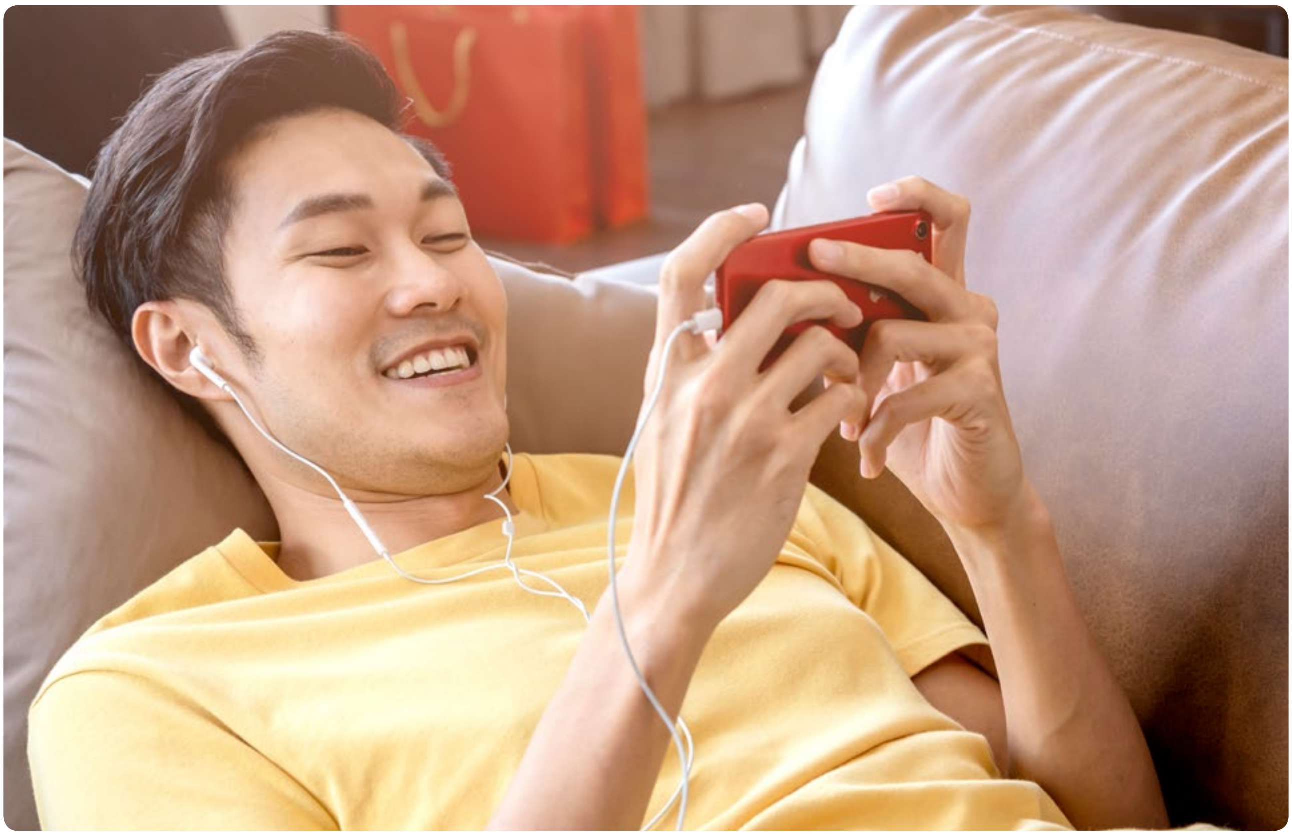
a. Includes FTTH/B and VDSL.
b. Includes ADSL and SDSL.
c. Includes Satellite, Fixed wireless and GigaWire.

NUMBER OF MOBILE BROADBAND SUBSCRIPTIONS BY TECHNOLOGY

Year	Quarter	At most 3G	At most 4G	At most 5G
		(million)		
2022	4	0.17	42.67	0.40
2023	1	0.15	42.59	1.03
	2	0.14	42.95	1.40
	3	0.10	41.62	3.05
	4	0.09	36.97	8.28
2024	1	0.08	32.89	11.93
	2	0.01	30.30	14.81
	3	0.01	27.73	17.29
	4	0.00	26.58	18.20

Explanatory notes:

The added total may differ due to rounding



NUMBER OF MOBILE CELLULAR SUBSCRIPTIONS AND PENETRATION RATE

Year	Quarter	Postpaid	Prepaid	Total	Penetration rate per 100 inhabitants
		('000)			(%)
Note					a
2022	4	14,294	33,658	47,952	145.3
2023	1	14,344	34,309	48,653	146.7
	2	14,456	34,984	49,440	148.1
	3	14,620	35,095	49,714	148.6
	4	14,825	35,311	50,137	148.7
2024	1	14,970	34,889	49,858	146.7
	2	15,229	34,927	50,156	147.3
	3	15,483	34,449	49,931	146.4
	4	15,749	33,913	49,662	145.4

Explanatory notes:

a. *The mobile cellular penetration rate refers to the total subscriptions divided by total number of population and multiplied by 100. A penetration rate over 100% can occur because of multiple subscriptions.*

MOBILE CELLULAR PENETRATION RATE PER 100 INHABITANTS BY STATE

State	2021	2022	2023	2024
	(%)			
Johor	148.8	153.9	159.3	154.8
Kedah	131.2	125.4	128.6	123.0
Kelantan	125.9	126.0	126.9	120.7
Melaka	132.0	134.0	130.4	131.5
Negeri Sembilan	157.1	157.7	156.7	145.9
Pahang	132.0	133.4	137.9	130.5
Perak	140.2	139.5	142.4	137.4
Perlis	136.3	122.3	119.5	112.4
Pulau Pinang	177.6	185.0	185.1	179.3
Sabah	98.5	108.4	106.7	105.8
Sarawak	130.7	143.0	145.9	146.6
Selangor	131.0	136.9	147.0	144.1
Terengganu	125.0	128.4	132.1	125.1
Wilayah Persekutuan	247.3	256.5	230.3	275.7
Malaysia	**142.1**	**145.3**	**148.7**	**145.4**

MOBILE NUMBER PORTABILITY

Year	Quarter	Postpaid	Postpaid
		('000)	
2022	4	895.4	329.7
2023	1	900.5	321.7
	2	880.3	298.4
	3	957.1	321.8
	4	1,009.1	329.5
2024	1	977.3	294.6
	2	963.7	277.4
	3	939.5	260.2
	4	879.2	267.3

PERCENTAGE OF MOBILE CELLULAR SUBSCRIPTIONS BY GENDER

Year	Male	Female
	%	
2019	63.1	36.9
2020	61.9	38.1
2021	61.8	38.2
2022	56.9	43.1
2023	62.2	37.8
2024	61.9	38.1

NUMBER OF SHORT MESSAGE SERVICES

Year	Quarter	Total (million)	Per subscription
Note		a	
2022	4	405.4	8.5
2023	1	359.8	8.4
	2	374.1	7.6
	3	306.2	6.0
	4	275.8	5.4
2024	1	248.9	5.0
	2	293.9	5.9
	3	271.3	5.4
	4	250.7	5.0

Explanatory notes:

a. Figure refers to the number of SMSes sent within the period.

NUMBER OF PAY TV SUBSCRIPTIONS AND PENETRATION RATE

Year	Quarter	Number of subscriptions			Penetration rate per 100 households
		Households	Non households	Total	
		('000)			(%)
Note					a
2022	4	6,499.8	9.6	6,509.4	80.6
2023	1	6,449.4	9.3	6,458.6	79.6
	2	6,396.9	9.1	6,406.0	78.5
	3	6,315.4	9.1	6,324.5	77.3
	4	6,294.1	9.0	6,303.1	76.4
2024	1	6,212.9	8.9	6,221.7	68.7
	2	6,065.1	9.3	6,074.4	66.9
	3	5,993.9	9.4	6,003.4	66.0
	4	5,948.2	9.7	5,957.9	65.4

Explanatory notes:

Pay TV is inclusive of IPTV and Satellite TV

a. *The pay TV penetration rate per 100 households is calculated by dividing the number of household subscriptions by the number of households and multiplied by 100.*

NUMBER OF CERTIFICATION AUTHORITIES

Year	Quarter	Number of licences
Note		
2022	4	4
2023	1	4
	2	4
	3	4
	4	4
2024	1	4
	2	4
	3	4
	4	4

Explanatory notes:

Refers to Certification Authorities licenced under the Digital Signature Act 1997.

NUMBER OF CERTIFICATES AS AT ISSUED BY TYPE

Year	Quarter	Domestic holder			Foreign holder	Total
		Individual	Organisation		Organisation	
			Corporate	Government	Government & Corporate	
		('000)				
2022	4	60.4	778.4	17,735.8	0.1	18,574.7
2023	1	60.4	812.4	18,330.1	0.1	19,203.0
	2	60.4	873.8	18,956.6	0.1	19,891.0
	3	60.4	989.2	19,174.0	0.1	20,223.7
	4	73.3	1,106.8	19,431.1	0.1	20,611.4
2024	1	128.7	1,218.5	20,238.3	0.1	21,585.6
	2	496.9	1,360.0	21,192.5	0.1	23,049.5
	3	837.0	1,542.0	21,527.4	0.1	23,906.6
	4	1,561.5	1,737.5	21,898.2	0.1	25,197.3

APPENDIX 2

Note	
1.	Commencing 2018, statistics from courier services were collected from all active courier licensees who conducted courier activity. Prior 2018, data was collected from top 10 courier licensees in terms of traffic and revenue.
2.	Where a table is not accompanied by a source acknowledgement, that table carries data that emanated solely from MCMC.
3.	Preliminary figures are italicised. Revised figures are underlined.
4.	The added total may differ due to rounding.
5.	Wilayah Persekutuan includes Federal Territory Kuala Lumpur, Federal Territory Labuan and Federal Territory Putrajaya.

POSTAL INFRASTRUCTURE

Year	Post office	Mini post office	Postal agent	Stamp vendor	Mobile post office	Post office accepting financial transaction	Sorting office	International office of exchange
Note	a	b	c	d	e	f	g	h
2020	674	136	232	381	21	674	20	1
2021	662	126	231	381	9	662	15	1
2022	638	227	225	381	9	638	8	1
2023	627	230	215	381	9	627	8	1
2024	627	230	207	131	9	627	8	1

Source: *Pos Malaysia Berhad*

Explanatory notes:

a. *Post office refers to post office with online system.*
b. *Mini Post Office is privately run by third party individual or business (eg. Sundry shops) to provide retail postal services similar to a post office. However, a Mini Post Office does not provide services by Amanah Saham Nasional Berhad (ASNB) and Jabatan Pengangkutan Jalan (JPJ).*
c. *A postal agent is typically a representative appointed within a community to whom Pos Malaysia Berhad delivers mails on behalf of his/her community. The community will then come to the agent's premise to collect their mails.*
d. *A stamp vendor is a third party (individual/businesses) who is authorised by Pos Malaysia Berhad to sell postage stamps on its behalf.*
e. *Mobile post office refers to post offices installed in a train, a road transport vehicle or a boat which serve regions without permanent post offices. They deliver mail and offer post office counter services. This category also includes rural delivery staff providing post office counter services on their rounds. Users can deposit parcels, letters or express items with them or make payments to them*
f. *Post offices accepting financial transactions include permanent offices and mobile offices (including rural delivery personnel) providing financial services (money orders, Cash on Delivery (COD), payments, etc.).*
g. *Sorting centres are infrastructure whose main activity is sorting. Sorting sections of post offices open to the public and delivery offices are not included in this category.*
h. *A processing hub for international inbound and outbound postal and courier items.*

POST OFFICE BY STATE

Year	State	Post office			Mini post office		
		Urban	Rural	Total	Urban	Rural	Total
2020	Johor	53	25	78	3	6	9
	Kedah	29	17	46	6	4	10
	Kelantan	7	21	28	1	11	12
	Melaka	28	0	28	3	0	3
	Negeri Sembilan	19	20	39	0	1	1
	Pahang	14	27	41	9	15	24
	Perak	50	33	83	3	6	9
	Perlis	9	0	9	1	0	1
	Pulau Pinang	38	1	39	7	0	7
	Sabah	14	28	42	2	4	6
	Sarawak	21	39	60	18	5	23
	Selangor	77	15	92	16	4	20
	Terengganu	13	15	28	3	6	9
	Wilayah Persekutuan	61	0	61	2	0	2
	Total	**433**	**241**	**674**	**74**	**62**	**136**
2021	Johor	56	20	76	1	8	9
	Kedah	33	11	44	4	6	10
	Kelantan	7	21	28	3	9	12
	Melaka	26	0	26	2	0	2
	Negeri Sembilan	18	21	39	0	1	1
	Pahang	18	23	41	9	14	23
	Perak	47	36	83	4	5	9

Year	State	Post office			Mini post office		
		Urban	Rural	Total	Urban	Rural	Total
2021	Perlis	9	0	9	0	0	0
	Pulau Pinang	38	0	38	7	0	7
	Sabah	11	30	41	0	6	6
	Sarawak	22	38	60	0	22	22
	Selangor	83	8	91	14	2	16
	Terengganu	13	15	28	4	3	7
	Wilayah Persekutuan	58	0	58	2	0	2
	Total	**439**	**223**	**662**	**50**	**76**	**126**
2022	Johor	54	20	74	16	10	26
	Kedah	33	11	44	8	6	14
	Kelantan	6	21	27	4	10	14
	Melaka	25	0	25	4	0	4
	Negeri Sembilan	18	21	39	1	1	2
	Pahang	17	23	40	5	18	23
	Perak	45	36	81	7	6	13
	Perlis	8	0	8	0	1	1
	Pulau Pinang	38	0	38	12	0	12
	Sabah	10	29	39	0	14	14
	Sarawak	18	38	56	0	35	35
	Selangor	80	8	88	39	5	44
	Terengganu	12	15	27	8	5	13
	Wilayah Persekutuan	52	0	52	12	0	12
	Total	**416**	**222**	**638**	**116**	**111**	**227**

Year	State	Post office			Mini post office		
		Urban	Rural	Total	Urban	Rural	Total
2023	Johor	53	20	73	17	10	27
	Kedah	33	11	44	7	5	12
	Kelantan	5	21	26	5	11	16
	Melaka	25	0	25	5	0	5
	Negeri Sembilan	18	21	39	2	2	4
	Pahang	17	23	40	5	18	23
	Perak	44	36	80	9	6	15
	Perlis	8	0	8	0	1	1
	Pulau Pinang	37	0	37	13	0	13
	Sabah	10	28	38	0	14	14
	Sarawak	18	38	56	0	35	35
	Selangor	80	8	88	29	5	34
	Terengganu	12	15	27	8	6	14
	Wilayah Persekutuan	46	0	46	17	0	17
	Total	**406**	**221**	**627**	**117**	**113**	**230**
2024	Johor	53	20	73	17	9	26
	Kedah	33	11	44	7	5	12
	Kelantan	5	21	26	5	11	16
	Melaka	25	0	25	5	0	5
	Negeri Sembilan	18	21	39	3	1	4
	Pahang	17	23	40	8	16	24
	Perak	44	36	80	10	5	15
	Perlis	8	0	8	0	1	1

Year	State	Post office			Mini post office		
		Urban	Rural	Total	Urban	Rural	Total
2024	Pulau Pinang	37	0	37	13	0	13
	Sabah	10	28	38	0	14	14
	Sarawak	18	38	56	0	35	35
	Selangor	80	8	88	36	4	40
	Terengganu	12	15	27	9	5	14
	Wilayah Persekutuan	46	0	46	11	0	11
	Total	**406**	**221**	**627**	**124**	**106**	**230**

Source: *Pos Malaysia Berhad*

POSTAL EMPLOYMENT

Year	Administrative	Call centre	Pick up & despatch	Sorting crew	Others	Total
Note					a	b
2020	8,327	255	10,625	3,105	550	22,862
2021	8,372	192	8,569	2,385	303	19,821
2022	7,098	140	7,902	1,493	795	17,428
2023	6,843	145	7,183	1,022	919	16,112
2024	5,174	135	7,104	1,223	2,625	16,261

Source: *Pos Malaysia Berhad*

Explanatory notes:

a. *Others include supervisor of postmen and wakil posmen.*
b. *Commencing 2018, the calculation for number of postal employment consist of full time and part time employees established or unestablished employees under contract to the designated operator, INCLUDING persons employed by contractors, or temporary employee taken on during holiday periods or for occasional events. However, retired employees as well as workers in subsidiaries abroad (if applicable) should be EXCLUDED. Prior 2018, the calculation for number of postal employment EXCLUDES persons employed by contractors, or temporary employee taken on during holiday periods or for occasional events.However,retired employees as well as workers in subsidiaries abroad (if applicable) should be EXCLUDED.*

   Full time employees means all employees performing their functions during normal working hours. Normal working hours means the number of working hours per week set by the designated operator for full time employment.

   Part time employees include employees working for less than the normal working hours each week.

POSTAL DELIVERY

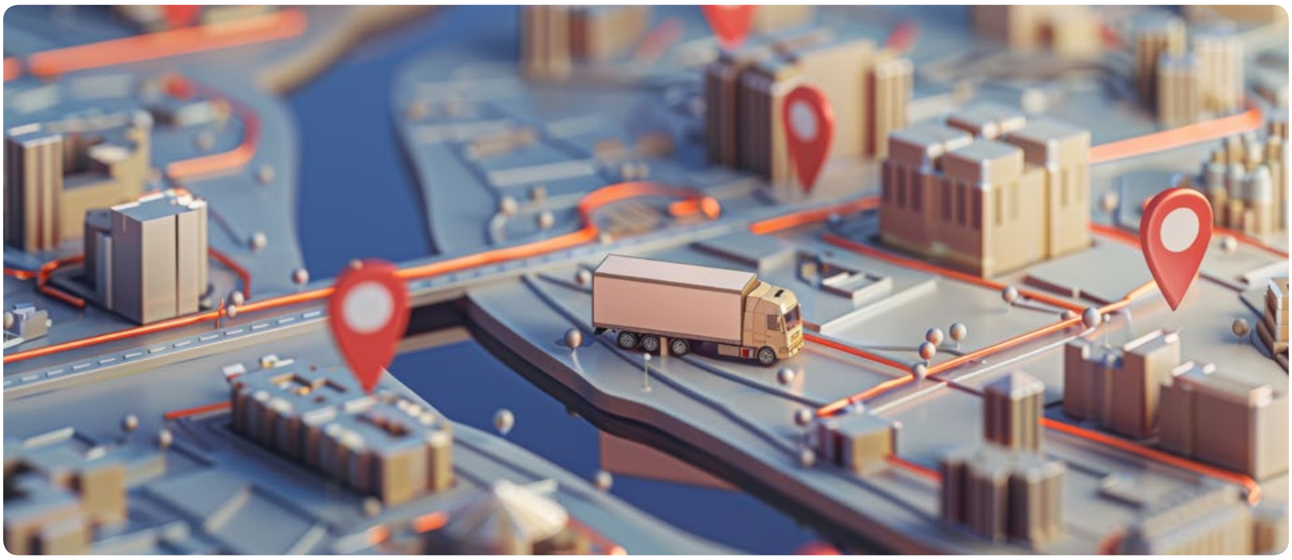
Year	Average number		Percentage		Number			
	Deliveries PER WORKING day in urban areas	Deliveries PER WEEK in rural areas	Population having mail DELIVERED at home	Population having to COLLECT mail from a postal establishment	Letter box	Post office box	Postal establishments having post office box	Automated parcel locker
2020	1	5	94	6	2,486	95,047	254	170
2021	1	5	80	20	2,440	95,514	233	153
2022	1	5	94	6	1,967	95,483	233	94
2023	1	5	94	6	1,706	90,782	226	59
2024	1	5	94	6	1,775	94,754	238	0

Source: *Pos Malaysia Berhad*

POSTAL COVERAGE AND SERVICE

Year	Average area covered by a permanent post office (km^2)	Average number of inhabitant served by a permanent post office
2020	356	35,413
2021	444	51,833
2022	465	52,594
2023	470	55,137
2024	470	54,343

Source: *Pos Malaysia Berhad*



POSTAL VEHICLE

Year	Motorcycle	Van	Lorry/Truck	Trailer	Aircraft
Note	a	a,b	c		
2020	7,198	4,288	354	6	0
2021	6,473	4,150	325	6	0
2022	5,457	2,845	318	6	0
2023	5,198	3,087	308	6	0
2024	4,729	2,789	265	5	0

Source: *Pos Malaysia Berhad*

Explanatory notes:

a. Commencing 2018, number of vehicles refer to vehicles owned by Pos Malaysia Berhad and vehicles owned by outsource contractors related to postal and courier activities. Prior to 2018, number of vehicles refers to vehicles owned by Pos Malaysia Berhad only.
b. Commencing 2019, number of vans includes 14 Pos On Wheels (POW) vans in Peninsular Malaysia.
c. Commencing 2019, number of lorries/trucks includes 6 Go2U (Pos Laju mobile units) and 18 POW lorries in Sabah & Sarawak.

POSTAL MACHINE

Year	Number				
	Post automated machine	Franking machine	Cancelling machine	Facing cum cancelling machine	Sorting machine with automatic address reading
2020	94	3,330	30	3	7
2021	94	3,336	30	3	7
2022	94	3,409	30	3	6
2023	81	3,421	30	2	6
2024	97	3,475	26	2	6

Source: *Pos Malaysia Berhad*

POSTAL TRAFFIC

Year	Number of letter post item ('000)		
	Domestic service	International service - issued	International service - received
2020	456,868.0	23,682.6	7,216.9
2021	364,957.0	8,259.1	4,743.0
2022	362,085.2	5,283.6	5,220.1
2023	317,418.5	4,360.1	4,598.0
2024	265,024.9	3,214.5	4,354.0

Source: *Pos Malaysia Berhad*

Number of express item ('000)			Others ('000)	
Domestic service	International service - issued	International service - received	Advertising item - domestic service	Users of digital mailbox item
462.8	2,899.9	593.0	5,955.8	27.6
48.6	453.7	544.6	899.6	-
1.8	611.4	307.0	2,269.5	0.0
0.0	947.6	237.0	7,623.4	0.0
0.0	1,172.2	241.3	6,817.6	0.0

POSTAL TRAFFIC - SPECIAL TREATMENT

Year	Number of post free item, domestic service ('000)	Number of registered item ('000)		
		Domestic service	International service - issued	International service - received
2020	2,321.9	19,262.0	1,289.0	523.4
2021	2,339.1	15,410.9	1,111.8	510.3
2022	1,784.7	17,886.1	865.3	351.4
2023	1,646.4	19,345.3	642.7	294.9
2024	1,583.2	21,909.4	862.8	257.2

Source: *Pos Malaysia Berhad*

POSTAL PARCEL SERVICE

Year	Ordinary parcel ('000)			Insured parcel	
	Domestic service	International service - issued	International service - received	Domestic service	International service - issued
2020	793.6	83.8	150.5	183	0
2021	750.5	19.4	169.7	1,468	0
2022	170.2	40.5	133.4	1,325	0
2023	143.2	39.2	107.9	1,597	0
2024	1,593.0	34.4	93.0	1,400	0

Source: *Pos Malaysia Berhad*

FINANCIAL SERVICE

Year	Money order ('000)					
	Domestic service		International service			
	Number	Value - issued (RM)	Number - issued	Value - issued (RM)	Number - received	Value - received (RM)
2020	129.4	33,329.3	0.02	0.3	0.000	0.0
2021	152.4	59,949.5	0.00	0.0	0.000	0.0
2022	181.7	50,853.9	0.002	0.1	0.000	0.0
2023	202.9	40,559.2	0.00	0.0	0.000	0.0
2024	163.3	28,742.1	0.00	0.0	0.000	0.0

Source: *Pos Malaysia Berhad*

PHILATELY

Year	Stamp issue			SODA ('000)	
	Special	Commemorative	Definitive	New member	Total member
Note	a	b	c	d	
2020	5	1	1	2.6	111.3
2021	7	2	0	2.7	114.2
2022	9	2	0	3.0	117.1
2023	10	2	0	3.0	120.1
2024	6	7	0	2.0	122.1

Source: *Pos Malaysia Berhad*

Explanatory notes:

a. *Shows the beauty, uniqueness, pride, heritage, art, culture, personality, development of science and technology, civilisation, history as well as the uniqueness of flora and fauna of Malaysia.*
b. *Commemorates important events in history which took place locally or internationally or events that are significant such as inaugural ceremony, anniversary and etc.*
c. *Featuring national aspects such as agriculture, crops and so on. Normally, it will change once every 5 years.*
d. *Standing Order Deposit Account. For purchase of philatelic items including first day covers via order whereby customer can register as a member and the order will be sent to the customer's address each time new themed stamps are launched.*

COURIER INFRASTRUCTURE

Year	Hub	Branch	Gateway	Franchise	Affiliate	Agent
Note	a	b	c	d	e	f
2020	380	1,219	35	203	17	4,129
2021	363	1,704	37	471	13	10,734
2022	403	1,155	48	507	13	10,771
2023	387	838	50	416	15	10,502
2024	284	852	58	541	2	9,284

Explanatory notes:

a. Hub refers to location to consolidate shipments on the large scale at major terminals and to redistribute the smaller scale of shipments to their respective destinations. In the field of logistics and supply chains, however, the hub concept has been often introduced in various terms in accordance with functionality: for example, logistics centre, logistics zone, freight terminal, distribution centre and warehouse.

b. Branch refers to other than an office of a company which is located somewhere other than the company's main office location. A branch office is simply another location, and is still involved in the business activities of the company.

c. Gateway refers to a point at which freight moving from one area to another is interchanged between transportation lines (airport).

d. Franchise refers to a legal and commercial relationship between the owner of a trademark, service mark, trade name, or advertising symbol and an individual or group wishing to use that identification in a business.

e. In logistic industry cases, the terms affiliate and associate are used synonymously to describe a company whose parent only possesses a minority stake in the ownership of the company.

f. An appointed agent other than at the principal office who is responsible for all of the logistical aspects of transporting materials or parcels, including scheduling, packing, routing, documentation, tracking, customs clearance, compliance, client communications, and negotiating on behalf of principal office the best terms and pricing.

g. Drop-in-centre refers to delivery of shipment to a transporter, without passing through the warehouse or through the normal logistic supply chain. Some logistics companies or couriers use the word Drop-off-center.

h. Others includes service centre, kiosk, etc.

i. Parcel locker refers to automated parcel lockers are strategically located at post offices, petrol stations, supermarkets, universities, train stations and residential areas. It provides a convenient (self-service), secure and automated service to customers to collect and drop their items for shipment that is available 24/7.

j. Kiosk refers to kiosk that operate in strategic locations such as shopping malls, petrol stations and LRT stations. The counters may open for extended hours (according to the premise owners) and focused on serving customers who are located within these facilities.

k. Service center refers to special services such as counters, distribution centre, counter, courier hub, retail point, service point, lodge in located at selected shop lots to provide convenience and priority to customers.

l. Drive-thru refers to a drive through counter concept for ease of customers to lodge an item or purchase products without having to leave their vehicle.

*** Commencing Q4 2021, there are five (5) new categories collected under courier infrastructure –service centre, kiosk, drive-thru and office. Prior Q4 2021, these new categories were captured under Others.*

Drop-in-centre	Others	Parcel locker**	Kiosk**	Service centre**	Office**	Drive-thru**
g	h	i	j	k		l
5,881	381	-	-	-	-	-
7,923	-	681	34	1,119	37	19
8,317	-	648	31	2,038	55	19
4,238	-	688	23	4,667	53	17
2,770	-	592	22	4,318	41	2

COURIER INFRASTRUCTURE BY STATE

Year	States	Hub	Branch	Gateway	Franchise	Affiliate	Agent
Note		a	b	c	d	e	f
2020	Johor	44	154	1	42	0	368
	Kedah	16	70	1	10	1	167
	Kelantan	12	76	0	8	0	187
	Melaka	12	40	0	5	0	112
	Negeri Sembilan	13	66	0	4	0	151
	Pahang	18	93	0	10	1	128
	Perak	20	138	0	24	10	234
	Perlis	2	16	0	0	0	61
	Pulau Pinang	28	83	3	14	3	222
	Sabah	21	83	6	12	1	245
	Sarawak	20	82	7	15	0	354
	Selangor	137	154	16	40	1	1,220
	Terengganu	9	60	0	6	0	95
	Wilayah Persekutuan	28	104	1	13	0	585
	Total	**380**	**1,219**	**35**	**203**	**17**	**4,129**
2021	Johor	41	193	2	82	0	1450
	Kedah	14	97	2	31	1	475
	Kelantan	15	99	0	41	0	327
	Melaka	11	52	0	15	0	441
	Negeri Sembilan	10	73	0	14	0	471
	Pahang	19	107	0	30	0	456
	Perak	20	181	0	60	7	666
	Perlis	1	17	0	5	0	108
	Pulau Pinang	28	103	4	29	3	666

Drop-in-centre	Others	Parcel locker**	Kiosk**	Service centre**	Office**	Drive-thru**
g	h	i	j	k		l
875	40	-	-	-	-	-
155	8	-	-	-	-	-
81	6	-	-	-	-	-
274	10	-	-	-	-	-
298	9	-	-	-	-	-
197	7	-	-	-	-	-
353	20	-	-	-	-	-
32	2	-	-	-	-	-
490	14	-	-	-	-	-
76	7	-	-	-	-	-
82	6	-	-	-	-	-
2,031	135	-	-	-	-	-
43	9	-	-	-	-	-
894	108	-	-	-	-	-
5,881	**381**	**-**	**-**	**-**	**-**	**-**
913	-	18	6	157	2	1
281	-	2	0	49	0	2
173	-	0	0	63	2	1
293	-	4	0	39	3	2
363	-	9	2	69	2	1
248	-	2	0	52	1	1
605	-	10	1	65	1	0
35	-	0	0	12	0	1
421	-	9	2	58	1	2

Year	States	Hub	Branch	Gateway	Franchise	Affiliate	Agent
Note		a	b	c	d	e	f
2021	Sabah	18	100	5	15	0	583
	Sarawak	25	107	7	15	0	363
	Selangor	129	372	15	76	1	3,226
	Terengganu	13	84	0	32	0	196
	Wilayah Persekutuan	19	119	2	26	1	1,306
	Total	**363**	**1,704**	**37**	**471**	**13**	**10,734**
2022	Johor	46	144	2	96	0	1,425
	Kedah	16	67	2	45	1	518
	Kelantan	17	43	0	54	0	414
	Melaka	12	34	0	22	0	442
	Negeri Sembilan	13	40	0	23	0	478
	Pahang	25	75	0	29	0	479
	Perak	29	114	0	50	7	699
	Perlis	1	11	0	4	0	128
	Pulau Pinang	28	83	4	34	3	757
	Sabah	24	84	7	12	1	615
	Sarawak	29	84	11	14	0	394
	Selangor	129	262	18	70	1	3,018
	Terengganu	16	42	0	34	0	243
	Wilayah Persekutuan	18	72	4	20	0	1,161
	Total	**403**	**1,155**	**48**	**507**	**13**	**10,771**
2023	Johor	46	114	4	87	1	1,437
	Kedah	20	48	3	32	0	523
	Kelantan	16	36	1	39	0	428
	Melaka	12	25	0	19	0	438

Drop-in-centre	Others	Parcel locker**	Kiosk**	Service centre**	Office**	Drive-thru**
g	h	i	j	k		l
307	-	4	1	16	1	0
156	-	2	0	30	4	0
2,733	-	325	14	323	15	5
123	-	4	0	46	1	2
1,272	-	292	8	140	4	1
7,923	**-**	**681**	**34**	**1,119**	**37**	**19**
1,049	-	17	5	284	3	1
367	-	5	0	87	1	2
256	-	0	0	102	2	1
325	-	4	0	74	2	2
367	-	9	2	108	2	1
263	-	0	0	87	1	1
671	-	2	1	146	2	0
41	-	0	0	23	0	1
529	-	11	2	112	2	2
337	-	5	1	37	5	0
117	-	1	0	67	9	0
2,595	-	328	13	615	19	4
163	-	1	0	64	1	2
1,237	-	265	7	232	6	2
8,317	**-**	**648**	**31**	**2,038**	**55**	**19**
470	-	12	2	648	2	1
193	-	9	0	215	2	2
157	-	0	0	231	1	1
148	-	4	0	187	1	1

Year	States	Hub	Branch	Gateway	Franchise	Affiliate	Agent
Note		a	b	c	d	e	f
2023	Negeri Sembilan	14	35	0	18	0	466
	Pahang	25	51	0	26	0	526
	Perak	30	73	1	44	8	706
	Perlis	1	10	0	6	0	129
	Pulau Pinang	26	52	4	20	1	711
	Sabah	23	73	7	9	2	565
	Sarawak	26	69	10	13	0	362
	Selangor	117	172	16	63	1	2,841
	Terengganu	16	32	1	26	2	299
	Wilayah Persekutuan	15	48	3	14	0	1,071
	Total	**387**	**838**	**50**	**416**	**15**	**10,502**
2024	Johor	34	111	5	105	0	1,283
	Kedah	10	53	4	35	0	492
	Kelantan	17	43	2	56	0	379
	Melaka	6	28	0	18	0	402
	Negeri Sembilan	10	37	0	19	0	423
	Pahang	18	55	0	32	0	486
	Perak	17	73	2	55	0	650
	Perlis	2	11	0	9	0	128
	Pulau Pinang	23	51	4	40	1	636
	Sabah	13	67	9	8	0	327
	Sarawak	18	66	13	13	0	289
	Selangor	92	168	14	92	1	2,624
	Terengganu	13	37	2	33	0	257
	Wilayah Persekutuan	11	52	3	26	0	908
	Total	**284**	**852**	**58**	**541**	**2**	**9,284**

Drop-in-centre	Others	Parcel locker**	Kiosk**	Service centre**	Office**	Drive-thru**
g	h	i	j	k		l
176	-	9	0	234	1	1
85	-	1	0	239	1	1
325	-	1	1	343	2	0
31	-	0	0	37	0	0
321	-	14	2	253	2	2
71	-	2	0	147	5	0
80	-	0	0	165	8	0
1,484	-	363	11	1,280	19	4
74	-	2	0	184	1	2
623	-	271	7	504	8	2
4,238	**-**	**688**	**23**	**4,667**	**53**	**17**
249	-	4	2	613	4	0
123	-	10	0	198	2	0
85	-	0	0	218	1	0
90	-	0	0	187	1	0
107	-	3	0	230	0	0
55	-	1	0	225	1	0
200	-	0	1	311	2	0
18	-	0	0	36	0	0
207	-	7	2	223	1	0
22	-	2	0	127	0	0
31	-	0	0	147	8	0
1,127	-	336	10	1,168	14	1
34	-	0	0	178	0	0
422	-	229	7	457	7	1
2,770	**-**	**592**	**22**	**4,318**	**41**	**2**

COURIER EMPLOYMENT

Year	Administrative	Call centre	Pick up & despatch	Sorting crew	Others	Total employees
Note					a	b
2020	13,167	2,757	94,565	10,926	7,883	129,298
2021	14,430	3,042	110,071	15,026	11,753	154,322
2022	11,811	2,942	118,327	17,114	11,792	161,986
2023	11,302	2,607	63,866	13,508	10,960	102,243
2024	9,852	2,189	79,048	17,174	13,317	121,580

Explanatory notes:

a. *Others in courier employment include employees in sales, marketing, finance, internship and non-operational, etc.*

b. *Commencing 2018, the calculation for number of courier employment consist of full time and part time employees established or unestablished employees under contract to the designated operator, INCLUDING persons employed by contractors, or temporary employee taken on during holiday periods or for occasional events. However, retired employees as well as workers in subsidiaries abroad (if applicable) should be excluded. Prior 2018, the calculation for number of courier employment EXCLUDES persons employed by contractors, or temporary employee taken on during holiday periods or for occasional events.However,retired employees as well as workers in subsidiaries abroad (if applicable) should be excluded.*

Full time employees means all employees performing their functions during normal working hours. Normal working hours means the number of working hours per week set by the designated operator for full time employment.

Part time employees include employees working for less than the normal working hours each week.

COURIER VEHICLE

Year	Motorcycle	Van	Car	Lorry/Truck	Trailer	Bulk carrier vessel	Aircraft
2020	34,490	9,842	37,505	7,249	138	2	166
2021	51,821	10,627	39,694	8,598	160	4	26
2022	71,115	9,976	33,605	8,674	172	4	32
2023	15,044	10,190	23,283	8,990	177	3	125
2024	17,345	9,891	33,069	9,933	183	3	43

Explanatory notes:

a. *Commencing 2018, number of vehicles refers to vehicles owned by courier companies, outsource contractors and employees' personal vehicles used for courier activities. Prior 2018, number of vehicles refers to vehicles owned by courier companies only.*

COURIER TRAFFIC

Year	Document ('000)		Parcel ('000)		Others ('000)	
	Domestic	International	Domestic	International	Domestic	International
Note					a	
2020	107,301.1	2,525.7	303,160.7	19,658.0	28,498.8	888.0
2021	94,623.4	2,026.0	623,178.2	31,185.5	19,559.1	204.3
2022	60,959.4	1,687.1	617,798.2	15,023.1	11,243.6	162.2
2023	46,724.2	2,133.5	807,880.2	14,962.2	7,052.2	399.4
2024	40,235.5	2,064.1	1,192,927.2	21,767.8	5,896.5	429.1

Explanatory notes:

a. *Includes non-priority mail, walk-in courier, prepaid, post express, etc.*

LIST OF ABBREVIATIONS

2G	2nd Generation
3G	3rd Generation
4G	4th Generation
5G	5th Generation
A	
ACE	"Access", "Certainty", "Efficiency"
ADEX	Advertising Expenditure
ADSL	Asymmetric Digital Subscriber Line
AI	Artificial Intelligence
API	Application Programming Interfaces
ARPU	Average Revenue Per User
ASP	Applications Service Provider
C	
C&M	Communications and Multimedia
CAGR	Compound Annual Growth Rate
CASP	Content Applications Service Provider
CFM	Communications and Multimedia Consumer Forum of Malaysia
CMA	Communications and Multimedia Act 1998
D	
DTH	Direct-to-Home
DTT	Digital Terrestrial Television
F	
FTA	Free-To-Air
G	

Gbps	Gigabits Per Second
GCC	General Consumer Code of Practice
GLC	Government-linked Company
GLIC	Government-linked Investment Company
GTC	General Terms and Conditions
I	
ICT	Information and Communications Technology
IoT	Internet of Things
IPTV	Internet Protocol Television
ISP	Internet Service Provider
ITU	International Telecommunication Union
L	
LTE	Long Term Evolution
M	
Mbps	Megabits Per Second
MCS	Mobile Content Services
MNC	Multi-National Companies
MNO	Mobile Network Operator
MSA	Commission Determination on the Mandatory Standard on Access
MSQoS	Mandatory Standards for Quality of Service
MVNO	Mobile Virtual Network Operator
MyIX	Malaysia Internet Exchange
N	
NADI	National Information Dissemination Centre
NFP	Network Facilities Provider

NSP	Network Service Provider
O	
OTT	Over-the-Top
P	
PEDi	Pusat Ekonomi Digital * Effective 1 March 2024, PEDi has been re-branded to National Information Dissemination Centre (NADI).
Q	
QoS	Quality of Service
R	
RAO	Reference Access Offers
S	
SGOV	State Government
SIM	Subscriber Identity Module
SMS	Short Messaging Service
SVoD	Subscription Video on Demand
U	
UPU	Universal Postal Union
USD	United States Dollar
USP	Universal Service Provider
V	
VoLTE	Voice Over LTE

Notes: *Revised figures are underlined.*

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