

Bangladesh Telecommunication Report Q4 2012

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Abstracts

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BMI View: The Bangladeshi telecommunications market harbours significant growth potential in light of the low penetration rates. Further, operators so far have been able to only offer basic 2G services as the regulator has yet to auction 3G licences, which is scheduled to take place in late 2012. Assuming that the auction proceeds smoothly, the Bangladeshi broadband market will also receive a boost, thereby spurring growth and investment in industries that require reliable high-speed internet connectivity.

Key Data:

Our fixed-line forecasts have been revised after adjustments were made to our 2010 and 2011 estimates. We continue to envisage muted growth.

Data from the ITU showed that there were more internet users than previously reported; consequently, we have upgraded our internet user forecasts. Broadband remains a strong growth industry in light of mobile solutions.

ARPUs are expected to continue trending downwards to an average of BDT145 in 2016 (average of the top three operator) due to the prevalence of prepaid subscriptions.

Key Trends And Developments

Pacific Bangladesh Telecom, which markets under Citycell, has announced that it plans to spend BDT16bn to switch from CDMA technology to GSM due to continuous bad performances in light of technology limitations. The long-awaited change, assuming that

the operator receives regulatory approval, should help bolster Citycell's outlook as it would allow subscribers of rivals firms to easily migrate to its network.

Bangladesh's finance minister has proposed the implementation of a 2% tax on mobile prepaid and postpaid subscribers in order to help fund government subsidy programmes on areas such as food and fuel, and prevent the country's fiscal deficit from widening. While the levy is not substantial, BMI is concerned that consumers, especially low-income subscribers, could still scale back on mobile expenditure, thereby hindering industry growth.

Bangladesh rose to 12th position in BMI's Asia Pacific Telecoms Risk/Reward Ratings with a Telecoms Rating score of 48.9. Even though the opposition Bangladesh Nationalist Party (BNP)'s political impotence makes it easier for the ruling Bangladesh Awami League to govern, given the minimal risk of political gridlock, we highlight that the ruling government still has to contend with a confrontational domestic political culture and a politically unstable geographic region. In particular, we highlight the regularity of labour unrest in the readymade garment sector and the humanitarian spillover from the ongoing crisis in neighbouring Myanmar.

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