

Cambodia and Laos Telecommunications Report Q3 2016

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Abstracts

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BMI View: Viettel has reportedly been chosen by the government as the foreign partner for Myanmar's fourth and final mobile operator, to be licensed by end-2016. Through a joint venture model, Viettel can replicate its tried-and-tested developing market strategy. However, the new operator's challenges include slowing organic mobile subscriber growth, ongoing price competition and corporate governance. Meanwhile Cambodia's mobile market has experienced significant growth in the last few years, but the momentum has come at the cost of one of the lowest ARPU levels in the Asia Pacific region. The lack of growth opportunities, coupled with intense price competition and a crowded market has seen prominent companies exit the market. In Laos, low-value prepaid mobile services predominate, and customers have little incentive to upgrade to higher-value products. This makes it difficult for operators to generate a meaningful return on investment in networks and spectrum.

Latest Updates & Industry Developments

Although mobile services in Myanmar are being extended to rural parts of the country, the emphasis is on prepaid services and this is putting downward pressure on ARPUs. The replacement of 2G networks with 3G/4G platforms will be the main development trend through to 2020 and beyond.

Mobile subscriber growth in Cambodia and Laos has been negatively affected by operator consolidation in the former and the purging of inactive SIMs in the latter. Price competition undermines the value of 3G networks.

In all three markets mobile substitution acts as a disincentive for investment in wireline voice and broadband. xDSL is the primary delivery platform as fibre is too expensive. We do not expect wireline broadband to become a mass-market phenomenon in any of these three markets in the medium to long term.

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