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Kazakhstan and Central Asia Telecommunications Report Q1 2016

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Abstracts

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BMI View: We maintain a cautiously optimistic outlook for the Central Asian telecommunications market as a whole.

There are some growth opportunities in the region, particularly with regard to 3G and 4G technology Uptake.

Nevertheless, state interference and political risk remains the most important risk of doing business in the Central Asian region.

This was again amplified as government involvement became a key theme over the course of 2015.

In Turkmenistan, a new state-owned company was created to spur competition, in Kyrgyzstan, state-owned Kyrgyz Mobile Company was sold to state-owned MegaCom and in Uzbekistan, state-owned Uzmobile launched a GSM network to better compete in the mobile market.

This therefore does not appear to be a risk that is going to end in the short or long term.

Kazakhstan is the most attractive of the region and its ascension to the WTO in June 2015 should lead to wide-scale privatisation of state-owned enterprises, Including in the telecoms sector.

Transitions to 3G will continue to be vital across the region and though 4G is available,

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it will remain too expensive for mass uptake.

Key Data

Altel, the mobile subsidiary of state-owned incumbent operator Kazakhtelecom, reportedly reached 2.1mn subscribers as of May 15 2015, representing annual growth of around 100%. The company expected to reach 3mn subscribers by the end of 2015, as it continued the rollout of its 2G/3G/4G network across the country. Altel is the only licensed provider of 4G in Kazakhstan, a situation which has been criticised by rival operators in the mobile sector. Altel also planned to stop providing services over CDMA technology on July 1 2015.

Kyrgyzstan's operators MegaCom, Sky Mobile (Beeline) and NurTelecom's mobile subsidiary O! registered 67.66% (around 1.9mn), 80.25% (2.2mn) and 79.49% (1.5mn) of their respective SIM cards as of May 1, according to the National Communications Agency. All operators were required to register their SIM cards by August 8. The combined total of 5.6mn registrations to date implies that the operators now need to register around an extra 2mn SIMs by the deadline.

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