

# Philippines Telecommunications Report Q3 2016

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## Abstracts

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BMI View: Telstra and San Miguel Corp's plans to pool their strength for the launch of a third mobile network have not materialised. We believe the regulator's lack of power in providing support to the new entrant, coupled with the duopolistic market power of the incumbents, proved to be barriers to entry. We maintain our long-held view that the Philippines' market would progress at a much faster pace with added competition from a third player, the absence of which means there is little incentive for Philippines Long Distance Telephone Company (PLDT) and Globe Telecom to develop better services.

### Latest Updates And Industry Developments

Mobile subscriptions reached 116.8mn at the end of 2015, representing a penetration rate of 116%. We forecast this to increase to 119.8% by end-2020, but downside risks to growth lie in rising consumer affluence, which will shift consumers' preference from prepaid to postpaid.

Blended gross prepaid ARPU was PHP104.40 in Q415, while postpaid ARPU was PHP906.30. Despite the mobile market effectively being a duopoly, ARPU continues to trend lower. We believe the move towards higher revenue-generating products and subscribers will be key to reversing falling ARPU.

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