

Philippines Telecommunications Report Q4 2016

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Abstracts

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BMI View: Telstra and San Miguel Corp's (SMC'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. Consequently, SMC withdrew from the market in March, but a far more experienced telecoms operator Telenor has offered to partner with SMC to challenge the duopoly of PLDT. It now depends on the regulator to resolve the stand-off between SMC and the incumbents.

Latest Updates And Industry Developments

Mobile subscriptions reached 121.7mn at the end of Q1 2016, representing a penetration rate of 119%. 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 PHP101 in Q116415, while postpaid ARPU was PHP1029. 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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