

Sri Lanka Telecommunications Report Q1 2016

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Abstracts

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BMI View: Prepaid subscribers dominate the mobile market and ARPU has been trending lower as operators engage in price competition to retain their subscriber market share. Although 4G LTE and LTE Advanced technology is now present in the market, we believe that take-up of data services is still limited in the medium term due to the price-sensitive nature of the consumer market. As the high telecoms tax continues to squeeze operator margins, smaller operators have been expressing interests in divesting their local operations; which could lead to consolidation in the sector. SLT's new fibre-optic network, which is still being rolled out, will bring fixed broadband to the next stage.

Latest Updates & Industry Developments

Over 74% of mobile phone subscriptions remain prepaid which limits the market for premium services, and average ARPU has declined steadily as operators compete aggressively on price. Further consolidation is likely in the mobile market with telecoms tax eroding operator revenues. Dialog Axiata continues to dominate the mobile market with an estimated 41.8% share of subscriptions in H115.

Improvements in broadband coverage and speed are vital to the future of the telecoms industry in Sri Lanka, and there is pressure on SLT to complete its fibre-optic network on time by end 2016. Broadband subscriptions are forecast to reach 3.2m by 2019.

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