

Thailand Telecommunications Report Q1 2016

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Abstracts

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BMI View: In 2015, the two major developments in the Thai telecoms industry pertain to the mobile sector, where the SIM registration drive which lasted till August saw a sharp decrease in prepaid subscriptions, although the extent to which operators were affected differed for various reasons. In addition, the 4G spectrum auction scheduled to take place in November 2015 will see operators investing in valuable spectrum which will enable them to expand their LTE networks and range of value-added-services (VAS) without having the state-owned operators taking a cut as per the previous BTO-concession model. However, the lack of regulator independence and the presence of political agenda in telecoms still inhibit the development of the industry.

Latest Updates & Industry Developments

Total mobile subscriptions fell to 88.31mn in Q215 as a result of the compulsory SIM registration drive which lasted till August. This also resulted in 3G/4G subscriptions as a percentage of total mobile subscriptions to rise to 91%, from 76% a year before, and we forecast total 3G/4G subscriptions to reach 81.65mn by end-2015, rising to 89.59mn by 2019.

Despite the focus largely on the mobile sector this year, latest fixed broadband subscription data from the regulator has shown a strong continuous growth in subscribers, to 5.99mn in Q215, representing growth of 11.3%. We believe that this steady increase will continue to reach 6.034mn by end-2015, and 6.45mn by 2019

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