

Thailand Telecommunications Report Q2 2016

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Abstracts

BMI View: In 2016, the focus in the Thai mobile sector will be on 4G as the 2015 spectrum auctions saw operators forking out exorbitant amounts for 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. On the fixed broadband side, the NBTC and ICT ministry have laid out investment and roll-out plans for a national broadband network, using proceeds from the spectrum auction, enlisting state-owned CAT and TOT to carry it out. However, the lack of regulator independence and a political agenda in telecoms still inhibit development of the industry.

Latest Updates And Industry Developments

Total mobile subscriptions fell sharply to 83.09mn in Q315 as a result of the compulsory SIM registration drive which lasted till August. This was a 23.4% y-o-y contraction of total mobile subscribers. However, a notable effect was the resulting rise in 3G/4G subscriptions as a percentage of total mobile subscriptions to 92%, from 82% a year earlier, and we forecast total 3G/4G subscriptions to reach 92.55mn by end-2020.

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 6.04mn in Q315, y-o-y growth of 9.2%. We believe this steady increase will continue in 2016 and reach 6.29mn by the year-end.

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