

Thailand Telecommunications Report Q4 2016

<https://marketpublishers.com/r/TA08F1993DEEN.html>

Date: September 2016

Pages: 79

Price: US\$ 1,295.00 (Single User License)

ID: TA08F1993DEEN

Abstracts

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BMI View: Following the 4G spectrum auctions in late 2015 and the re-auction in May 2016, competition in the telecoms sector has been fiercer than ever. Efforts to migrate 2G subscribers to 3G and 4G networks have led to increased costs from marketing expenses and handset subsidies, and this has been reflected in operators' Q216 financials with DTAC experiencing an 89.7% y-o-y fall in net profits and True drawing a net loss for the quarter. While the licensing of spectrum through auctions has incentivised operators to speed up service development and network rollouts, the lack of regulator independence and a political agenda in telecoms will continue to weigh on the industry, and this could be aggravated by the establishment of the new Digital Economy and Society Ministry.

Latest Updates And Industry Developments

Jas Mobile failed to generate the estimated USD2.1bn required for the first instalment of the 4G spectrum licence it won last year. DTAC and True have walked away from the auction and AIS became the receiver of the spectrum block at Jas's winning bid. The failure of Jas to enter the market will ensure that competition amongst the three incumbent players will heat up.

Total mobile subscriptions have rebounded to 86.54mn in Q116 after falling for three consecutive quarters in 2015 as a result of the compulsory SIM registration drive which lasted till August. This figure still represents a 7.4% reduction from Q115 figures. However, a notable effect was the resulting rise in 3G/4G subscriptions as a percentage of total mobile subscriptions to 95%, from 85% a year earlier, and we forecast total 3G/4G subscriptions to reach 86.6mn by end-2020.

Despite the focus on the mobile sector this year, latest fixed broadband subscription data from the regulator has shown a strong continuous growth in subscribers, to 6.4mn in Q116, y-o-y growth of 14.3%. We believe this steady increase will continue into 2016, reaching 6.85mn by the year-end.

Contents

BMI Industry View

SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (Thailand 2013-2020)

Industry Risk/Reward Index

Asia Pacific Risk/Reward Index

Table: APAC Telecoms Risk/Reward Index, Q416

Industry Risk/Reward Index

Market Overview

Market Drivers & Trends

Mobile

Table: 3G & 4G Uptake by Operator ('000)

Wireline Voice & Broadband

Table: Broadband Market Growth

Table: Thai Broadband Market (2015e)

Pay TV/ Convergence

Regulatory Development

Regulatory Overview

Industry Risks

Main Development: Concessions Vs Licensed Spectrum

Additional Developments

Table: Thailand's Regulatory Bodies And Their Responsibilities

Competitive Landscape

Table: Mobile Market Overview

Table: AIS

Table: DTAC

Table: True

Table: Broadband Connections

Company Profile

TOT

True Corporation

Advanced Info Service (AIS)

DTAC

Demographic Forecast

Table: Population Headline Indicators (Thailand 1990-2025)

Table: Key Population Ratios (Thailand 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Thailand 1990-2025)

Table: Population By Age Group (Thailand 1990-2025)

Table: Population By Age Group % (Thailand 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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