

**NEW
DATES & VENUE**

TUESDAY 6 - THURSDAY 8 DECEMBER 2016 | NOVOTEL YANGON MAX, YANGON

MYANMAR'S COMPLETE ICT SOLUTIONS, MOBILE, BROADBAND, SATELLITE & BROADCASTING EVENT

***Myanmar ICT market news.... Issue of August 2016
Telecoms & Mobile Infrastructure***

-through 2014 and 2015 and leading into 2016 total foreign investment in the Myanmar telecommunications market reached US\$2.8 billion on an annual basis. The anticipated growth in the market is reflected by Huawei's internal turnover target of 1 US\$ billion by 2018.

-more than 11,700 towers have been built to date, with industry sources suggesting the need to build a total of 20,000 to enable complete country coverage.

-the mobile market is classified as a *fast grower* by the GSMA. The latest Q4 2015 figures recorded 37.5 million connections covering a population of 54.1 million. The leading operators are respectively MPT, Telenor and Ooredoo.

-the fourth mobile licence has been awarded to a consortium of Myanmar companies, who have partnered internationally with Viettel; the working arrangements are still in process, but the Vietnamese telco is expected to invest US\$1.5 billion in establishing a 3G network. Currently the service is anticipated for launch in April 2017.

Mobile & Mobile Data Services

-there is an exponential surge in demand for data services. The leading operators in Myanmar have quickly adapted to upgrading their networks to handle increasing demand for data services and the roll out of 3G and 4G services. Ooredoo claims 500,000 4G users since the launch of services in May, with 4G coverage available to 4.6 million people. Telenor launched 4G services in the capital city (Nay Pyi Taw) in July and is trialling 4G in several cities. MPT is well placed to offer upgraded services. (Source: *Myanmar Times*)

-the growth of 4G will depend on additional radio frequency. The auction for 40MHz on the 2600 MHz band will begin on the 17th October

-Demand for Facebook and Gmail is driving data. A survey by *Mileage Communications Myanmar* showed that 71.3% of respondents subscribe to Facebook, while 22.8% use Gmail.

-App based service potential is most apparent in the digital payments, agricultural and healthcare markets. Yoma Bank is awaiting final approval to launch Wave Money, a joint venture with Telenor. With less than 10% of the population having access to a bank account mobile based financial services is expected to revolutionise access to banking services.

-meeting demand for data services requires the permissions for the International Gateway agreement to be signed off and this is expected to happen in the next two months.

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Broadband/FTTH

-in April 2016 68 licences were issued for telecoms services. This list comprised 34 nationwide licences, 13 network services and 19 application service licences.

-With a current 1% penetration level in broadband access the market is in open play, but ultimately the challenge will be delivery of the 'last mile' connection.

-several licence holders are well placed to launch new broadband services. One of these, MFOCN, currently has a 12,500 kms of network in place and is building out a network of 20,000 kms by the end of 2016.

Satellite Services

-projected satellite demand is expected to grow from 1,418 MHz to 2,458 MHz by 2029. Current usage is for cellular backhaul (38%), VSAT (29%), television (28%) and others (5%). (source: SAT Consult)

-a wide range of satellite services are in the process of being launched. KBZ Gateway opened its first earth station in May 2016 to build connections between 6000 sites over the next five years. In addition to serving the needs of the KBZ group member companies VSAT services are being launched to the Myanmar enterprise markets in the next few weeks.

Broadcasting

-CNN has teamed up with for local language production of CNN's 24 hour news channel with local media outlet, belonging to Shwe Than Lwin Media company.

-the liberalisation of the sector will start with a content law, which is expected to be passed shortly.

-there is strong demand for local content production and enabling access to international programming and channels.

Enterprise Solutions

-The B2B market is a major opportunity for the telcos, as the number of registered companies grows rapidly with liberalisation of the economy. According to the UN's ESCAP report of 2014 the number of SME's grew to 126,237 by 2014.

-As Myanmar is a long way behind ASEAN levels of investment and IT infrastructure spend there are extensive opportunities in the provision of services to enterprises, from cloud computing to 'SaaS' and 'IaaS'.

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'Many big companies are seeking to improve their information technology systems now some international sanctions have been rolled back and communications have improved through the building of mobile phone voice and data networks.' *Financial Times* (26.11.15)

OUTLOOK: Telecommunications development remains a fundamental pillar in the evolution of Myanmar's economy and supports the development of other sectors, particularly financial services (*THE REPORT Myanmar 2016*, Oxford Business Group).

Sources: The information in this report is sourced from publishers as quoted and is supplemented by meetings with industry contacts in Yangon and Nay Pyi Taw.

To take advantage of the opportunities book your space at the CommuniCast Myanmar 2016, to be held from 6 – 8 December in Yangon. For further information please contact Rupert Owen, email: rowen@oesallworld.com Tel: + 44 20 7840 2121

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