



# Cambodia Telecoms (Mobile, Broadband and Digital Media) Market Statistics, Market Share, Analyses, and Forecast to 2021

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*Despite its status as a least developed country and upgrade its telecom infrastructure are bearing fruit.*

PUNE, INDIA, September 20, 2016 /EINPresswire.com/ -- Cambodia - Telecoms, Mobile, Broadband and Digital Media – Statistics and Analyses

Wiseguyreports added research report on “Cambodia - Telecoms, Mobile, Broadband and Digital Media – Statistics and Analyses” to its research database.

## Executive summary

### Consolidation Continues in Cambodia’s mobile sector

Despite its status as a least developed country and remaining one of the poorer countries in Southeast Asia, Cambodia’s efforts to expand and upgrade its telecom infrastructure are bearing fruit. There was very little infrastructure remaining from before the tumultuous Khmer Rouge days. As a result, Cambodia bypassed rebuilding the fixed-line market and quickly launched into alternative technologies, jump-starting its telecommunications infrastructure with digital technology. Not surprisingly, mobile services have completely overwhelmed the market. There have been between eight and ten mobile operators vigorously competing with each other in a market segment that was indeed growing at a rapid rate. At the same time the market had started to go through a process of rationalization with a reduced number of operators.

The mobile subscriber growth rate in 2015 and 2016 was a low 2% as the market reached 21.2 million subscribers in 2016. The mobile market is now mature and saturated. Further slow growth is also predicted over the next five years to 2021. By that year the market will reach mobile penetration of between 138% and 142.

In May 2016 Viettel Global announced that it was considering selling part of its stake in Cambodian unit Metfone. Viettel holds a 90% stake in Metfone. In August 2016 Smart Axiata announced plans to invest a further USD75 million during the rest of 2016 as it continues to expand its 4G LTE network nationwide.

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Limited fixed-line growth that had come about in Cambodia earlier on had mainly been through investment under foreign assistance plans, focusing on the capital Phnom Penh. Subsequently, geographical coverage did not increase significantly for a decade or more. The number of fixed telephone lines in Cambodia is slowly declining from a very small base as the mobile segment continues to expand. Overall penetration dropped from 2.3% in 2014 to 1.6% in 2015 and 1.4% in 2016.

The expansion of internet services in Cambodia has been largely overshadowed by the strong focus on mobile services. Internet take-up rates remained disconcertingly low for many years, with the country claiming one of the lowest internet penetrations in the region. The limited fixed-

line infrastructure had been a major inhibiting factor in the roll-out of both dial-up and DSL internet services.

Fixed broadband penetration is increasing moderately from a very small base. Penetration increased from 0.2 in 2012 to 0.4% in 2014 and 0.6% in 2016. Fixed broadband penetration is predicted to grow from 1.2 % in 2016 to reach between 2.2% and 2.7% by 2021.

The Ministry of Posts & Telecommunications (MPTC) officially launched the Telecommunications Regulator of Cambodia (TRC) in 2012. The move effectively transferred the regulatory role of the MPTC to the TRC, making the new authority responsible for the key areas of spectrum allocation and the regulation of pricing, among others. By 2016 the TRC was already playing a key role in the local telecom industry; there remained a significant range of regulatory and market issues still to be addressed.

In January 2016 Cambodian telecoms company Kingtel, a subsidiary of Key Bridge International (Hong Kong) Investment, has begun offering commercial fiber-based internet access services in the capital Phnom Penh and planned to launch voice telephony during early 2016.

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In May 2016 Huawei Technologies signed a memorandum of understanding (MoU) with Star Digital MUDS TV, a Cambodian telecoms and media consultancy firm. Huawei agreed to provide telecoms equipment and services to Star Digital to support the implementation of a 4G network.

In June 2016 Thailand's National Broadcasting and Telecommunications Commission (NBTC) was reported to be planning to set up a standard registration platform for pre-paid mobile SIM cards across Thailand, Cambodia, Laos and Myanmar.

#### Key Developments:

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