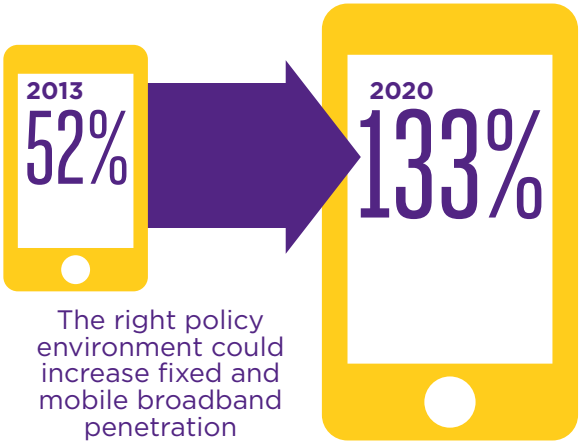
BUILDING THAILAND'S DIGITAL ECONOMY AND SOCIETY

Increased mobile broadband penetration in Thailand will enable the Government to achieve its digital economy goals and reinforce digital inclusion. The right policy environment could increase fixed and mobile broadband penetration from 52% in 2013 to 133% in 2020, leading to a cumulative GDP increase of USD23 billion (THB730 billion).

The socioeconomic impact of wider mobile broadband access is profound. From improving productivity, driving the creation of new businesses and skilled jobs, to providing access to mobile healthcare and money services and enabling smart cities.



The right policy environment could increase fixed and mobile broadband penetration

The right policies can incentivise operator investment in mobile broadband:

- Provide fair, transparent access to mobile spectrum by transitioning from a concession to a licensing regime
- Award available spectrum in the 900MHz and 1800MHz bands at the earliest opportunity to expand 3G and 4G mobile services. The swift adoption of 3G indicates there is demand for mobile broadband
- Plan to make the globally harmonised 700MHz 'Digital Dividend' band available to ensure good value mobile broadband services - providing good coverage in rural areas and inside buildings
- Maintain a level-playing field within the market between all private and state-owned companies. Network competition worldwide has driven mobile coverage and incentivised infrastructure roll-out
- Establish a business-friendly environment through transparency and stakeholder consultation to maximise the certainty of investment in cutting edge technologies and services
- An independent regulator with a clearly defined mandate contributes to improved investor confidence

Supportive government-led demand-side policies will further enhance Thailand's information and communications technology (ICT), encouraging mobile broadband usage with consumers

MOBILE IMPACT IN THAILAND

Mobile services such as DTAC 'Farmer Information Superhighway' and 'TrueMoney' demonstrate how data services can have a profound socioeconomic impact.

DTAC 'Farmer Information Superhighway' has further empowered 250,000 farmers through access to essential agricultural information and advancing techniques via mobile, improving yields and profitability.

TrueMoney is transforming access to financial services. It enables 25 million people to execute e-payment transactions and is expanding to offer person-to-person payment for unbanked customers.

Alignment with digital economy goals

The mobile sector in Thailand is helping to meet six key goals in Thailand's Digital Economy Plan. An improved policy environment will help speed up this process in future.

Digital Economy goal	Mobile sector contribution	Key policy enablers	Key risks
01 HARD INFRASTRUCTURE	Roll-out of new 4G mobile network infrastructure Investment in new mobile broadband technologies	Sufficient spectrum to enable effective provision of countrywide infrastructure and services Availability of sufficient fixed backhaul (e.g. fast-fixed broadband network)	Insufficient spectrum per operator affecting the roll-out of new services
02 SOFT INFRASTRUCTURE	Improvements to ICT abilities and skills of the population/workforce Opportunity for individuals to be employed in skilled jobs, through building of new mobile networks and related mobile services development opportunities	Legislative support to lower cost for mobile network investment e.g. appropriate spectrum governance, voluntary infrastructure sharing, removal of barriers to consent for new radio masts and sites, etc.	Lack of accountability and fairness in spectrum allocation and assignment (e.g. lack of an independent regulator), affecting investor confidence
03 SERVICE INFRASTRUCTURE	Access to country-wide mobile broadband services	Policies targeted at improving ICT infrastructure access and use in rural areas Release of additional spectrum to mobile (e.g. APT700 band for wide-area coverage) Government services digitisation and establishment of e-government	Lack of long-range (strategic) planning to support emerging technological opportunities
04 PROMOTING/ IMPLEMENTING	Increase in broadband connections penetration Substantial increment in GDP* Creation of new skilled jobs	Policies to promote a vibrant broadband market e.g. achievement of the goals of the Digital Economy Plan	Lack of long-range (strategic) planning to support development of a digital economy
05 DIGITAL SOCIETY	Development of m-applications to support local services e.g. education and health, as detailed in this report	Building awareness of the Internet and developing digital skills Policies to enhance digital literacy and development of local content (i.e. to encourage use of e-learning applications)	Lack of awareness and education towards the under-served to adapt to emerging mobile technologies
06 DIGITAL KNOWLEDGE	Development of m-applications tailored to specific sectors in the Thai market e.g. Farmer Information Superhighway, as detailed in this report	Policies to incentivise businesses to enter the mobile economy	Lack of awareness and education towards the under-served to adapt to emerging mobile technologies

*refers to broadband in general, including mobile broadband