

Cambodia

Cambodia has a competitive mobile market deploying the latest LTE technologies.

Mobile services: Cambodia has been one of the more competitive markets in the region, and one characterized by ongoing mergers and acquisitions. There are presently six active operators. The largest is SMART, which is majority-owned by the Malaysian AXIATA group. VIETTEL, the Vietnamese mobile group, is the second largest. Operating under the METFONE brand, it was launched in 2008 and purchased the mobile operator Beeline in 2015. CAMGSM, operating under the brand CELLCARD, is one of the oldest operators. It has been in service since 1996 and is 100 per cent locally owned. Three smaller companies also operate in the market. GSM mobile coverage is high, with subscription penetration passing the 100 per cent mark in 2011. Availability of mobile phones is high for a least developed country, and stands at 87 per cent overall (96 per cent in urban areas and 86 per cent in rural ones).¹¹⁷ Mobile broadband has developed rapidly owing to the scarcity of fixed infrastructure, and the first 3G network was launched in 2007. In 2014, SMART became the first operator to launch LTE, which is now available across 25 provinces covering over half the population. The other leading operators launched LTE in 2015. Most Internet access is via mobile phones, and almost half the population (48 per cent) had a smartphone in 2016.¹¹⁸

Fixed services: State-owned Telecom Cambodia is the main fixed telephone service provider. In addition, there are seven other licensed operators using a mixture of copper PSTN lines and wireless local loop technologies. Owing to the popularity of mobile, fixed telephone subscriptions have been in decline since 2012. Fixed broadband is provided through a mixture of technologies including ADSL, fixed wireless, cable modem and fibre. The country has an extensive national backbone, with fibre-optic networks operated by three companies. The largest is owned by VIETTEL, while the Cambodia Fibre-optic Communication Network was launched in 2006 with the backing of Chinese shareholders. Telecom Cambodia also operates some fibre-optic backbone routes. Two submarine cables land in Sihanoukville on the Gulf of Thailand. There are two Internet Exchange Points - the Cambodian Network Exchange that began in 2008 and the HTN-Cambodia Internet Exchange established in 2013.

Key indicators for Cambodia (2017)	Asia & Pacific	World
Fixed-telephone sub. per 100 inhab.	0.8	9.5
Mobile-cellular sub. per 100 inhab.	116.0	104.0
Active mobile-broadband sub. per 100 inhab.	66.9	60.3
3G coverage (% of population)	83.9	91.3
LTE/WiMAX coverage (% of population)	57.5	86.9
Individuals using the Internet (%)	34.0	44.3
Households with a computer (%)	12.5	38.9
Households with Internet access (%)	21.0	49.0
International bandwidth per Internet user (kbit/s)	31.9	61.7
Fixed-broadband sub. per 100 inhab.	0.8	13.0
Fixed-broadband sub. by speed tiers, % distribution		
-256 kbit/s to 2 Mbit/s	1.2	2.4
-2 to 10 Mbit/s	32.5	7.6
-equal to or above 10 Mbit/s	66.3	90.0

Note: Data in italics are ITU estimates. Source: ITU (as of June 2018).

Government Policy: The Ministry of Post and Telecommunications (MPT) is responsible for the sector. The *Law on Telecommunications* adopted in 2015 formally established the Telecommunication Regulator of Cambodia. The main objective of the Telecommunication Regulator of Cambodia (TRC) is to formulate regulations relating to the operation and provision of telecommunications networks and services. The *Telecom/ICT Development Policy 2020* was adopted in 2016. The policy established a number of targets to be achieved by 2020, such as 100 per cent broadband coverage in urban areas and 70 per cent in rural ones. It also targets an 80 per cent Internet penetration rate. There are three key objectives: i) to improve and expand telecommunication infrastructure and usage; ii) to develop ICT human capacity; and iii) to diversify the ICT industry and promote ICT applications.

Conclusion: With a highly competitive mobile market, Cambodia has achieved a very high rate of mobile access with the cheapest mobile-broadband prices in the region.