

Promoting broadband connectivity in Myanmar

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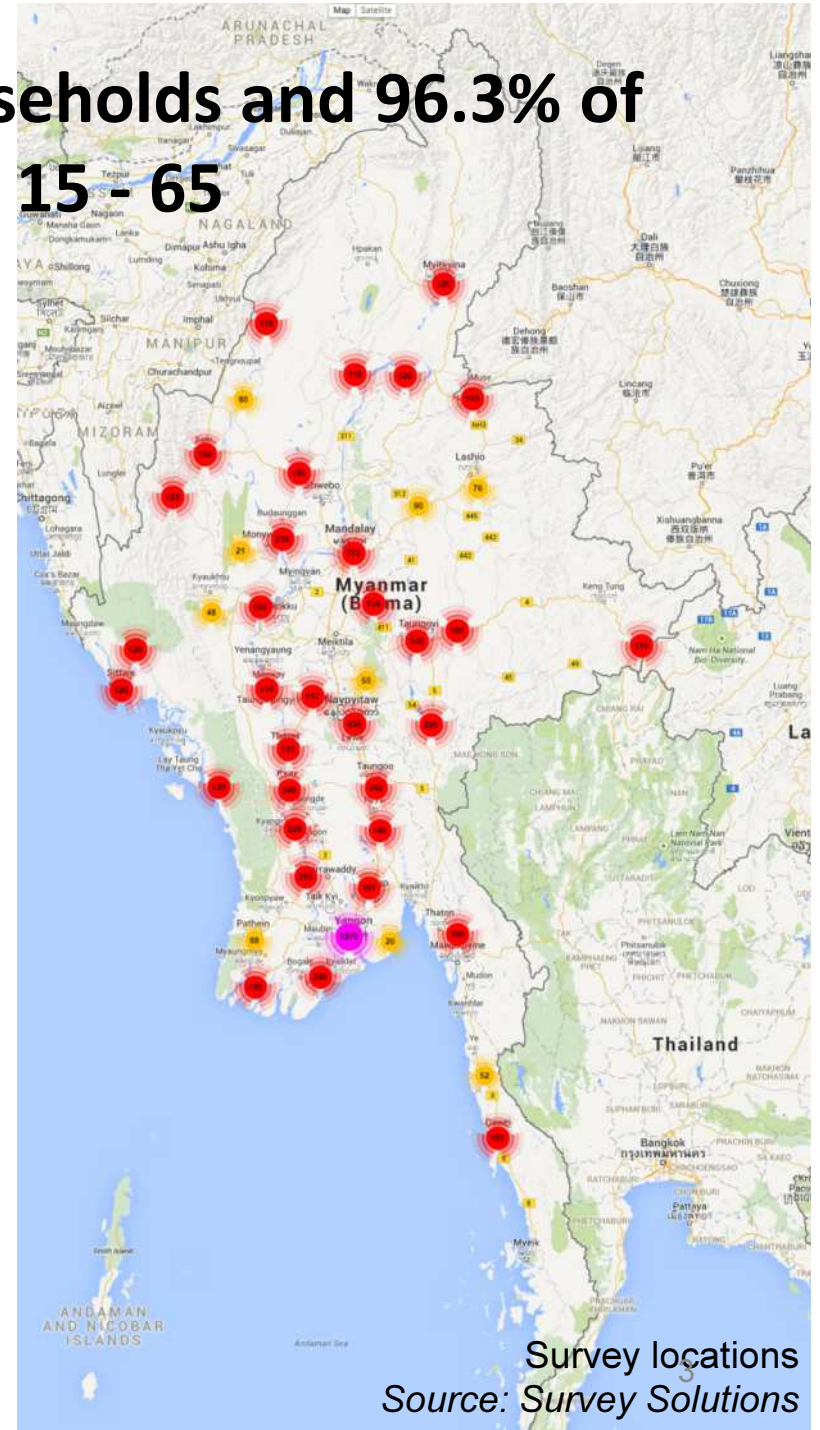


Helping policy makers, media and stakeholders understand the ICT transformation

DEMAND-SIDE STUDIES: QUANTITATIVE & QUALITATIVE STUDIES, 2014-16

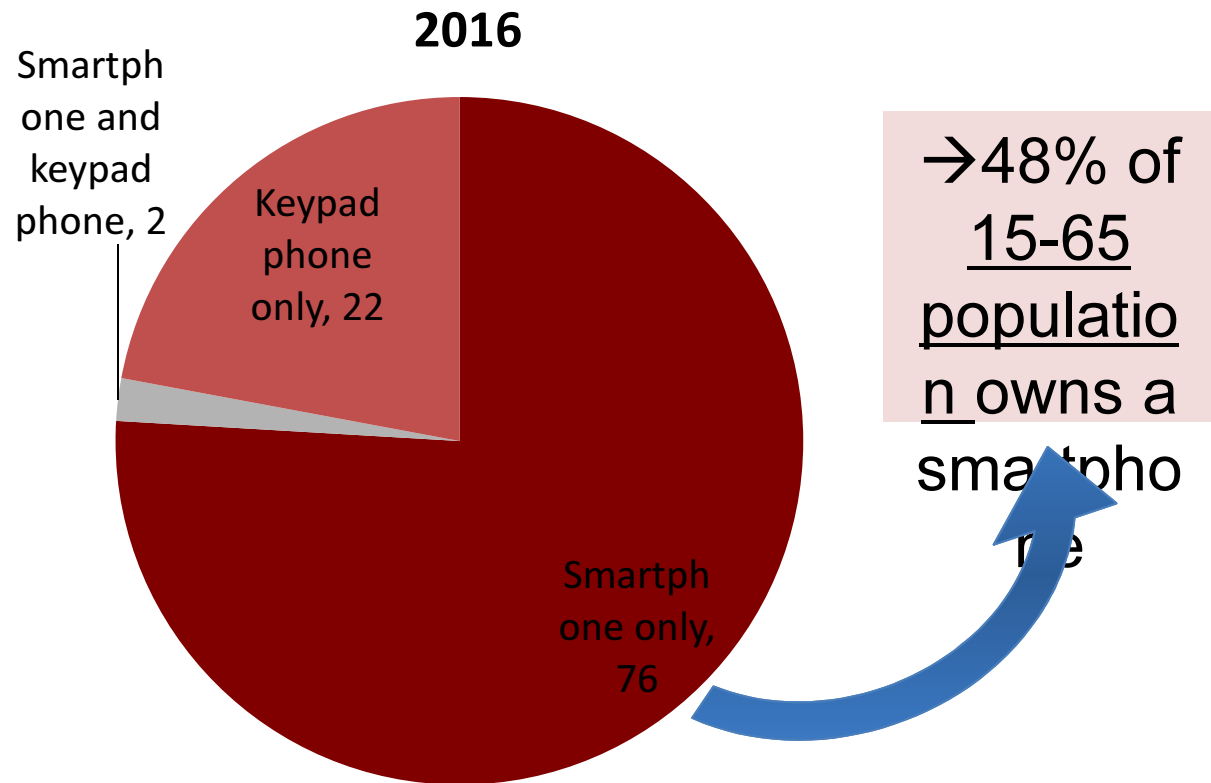
Representative of 97% of households and 96.3% of population aged 15 - 65

- At 3% margin of error, representative of
 - 96.3% population aged 15-65
 - 97% of total households
 - 91.8% of total population
- In all accessible areas of Myanmar;
 - 298 of 330 townships
 - 32 townships excluded due to security concerns



78% of mobile owners own smartphones. In 2015 it was 66%

Mobile handset type (% of mobile owners)

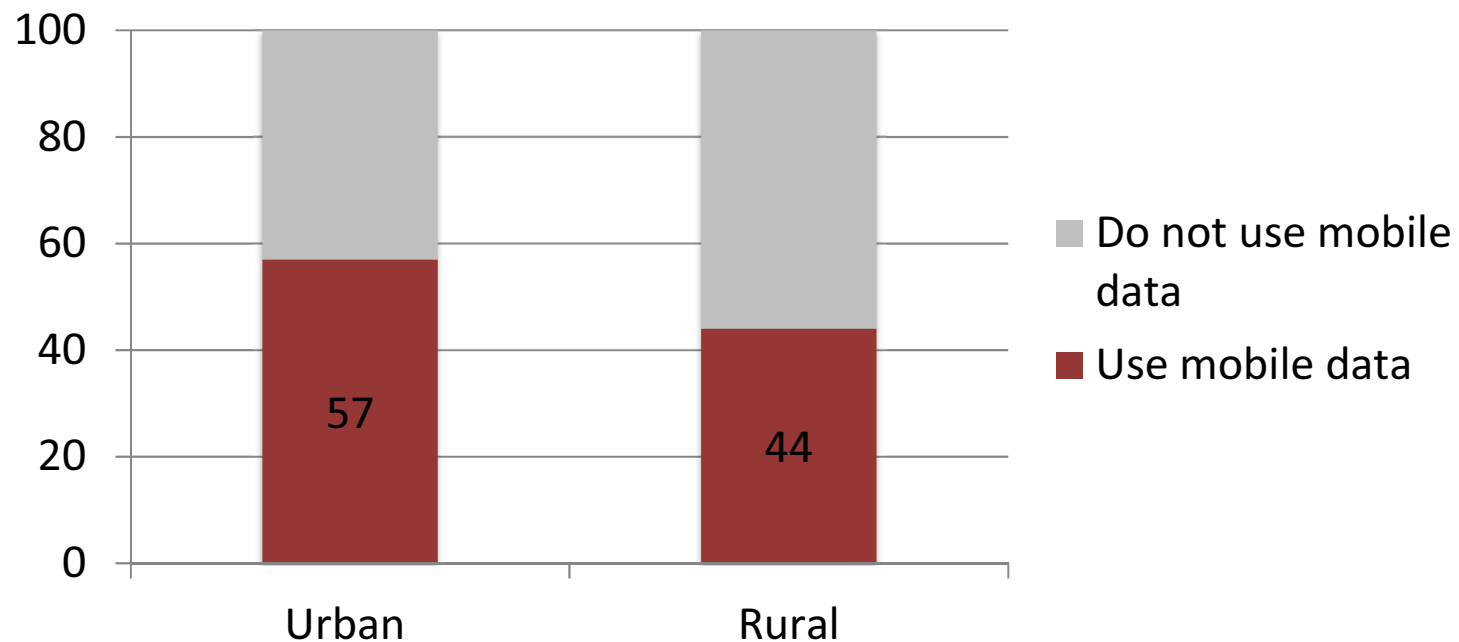


Q: How many of the following types of functioning smartphones ('touch phones')/ keypad handsets do you own

Source: LIRNEAsia 2016 nationally representative survey. Base: Mobile phone owners

49% of handset owners use data services; many in rural areas also use mobile data services

Use of data services on mobile (% of mobile handset owners)



Note: Refers to those who said they use various data services daily/weekly/occasionally

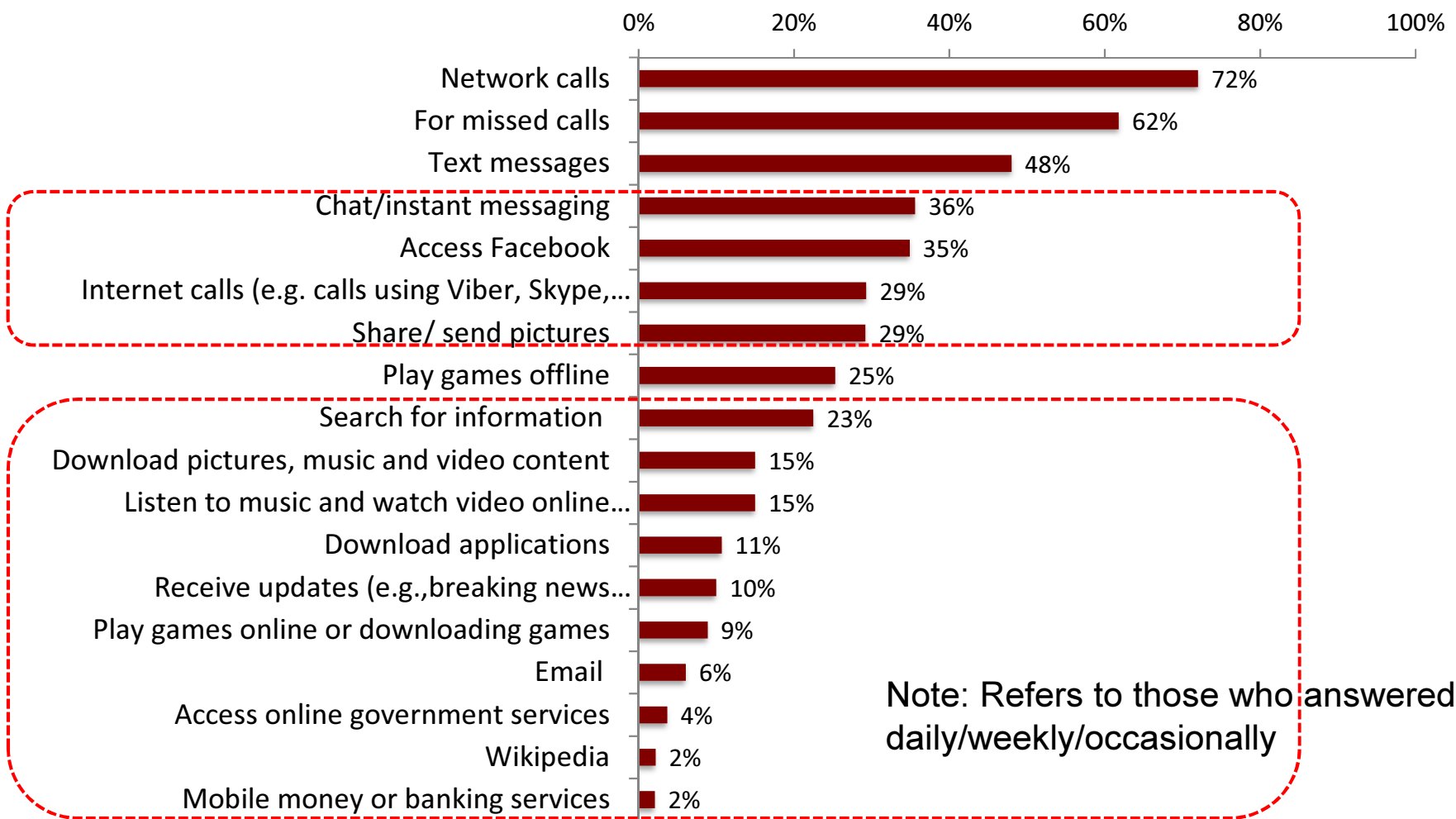
Q: Please tell me how often you use your mobile phone for any of the following purposes?



Source: LIRNEasia 2016 nationally representative survey. Base: Mobile

Though network calls & text messages still dominate, there is high data use by mobile owners

Uses of mobile phone (% of mobile handset owners)



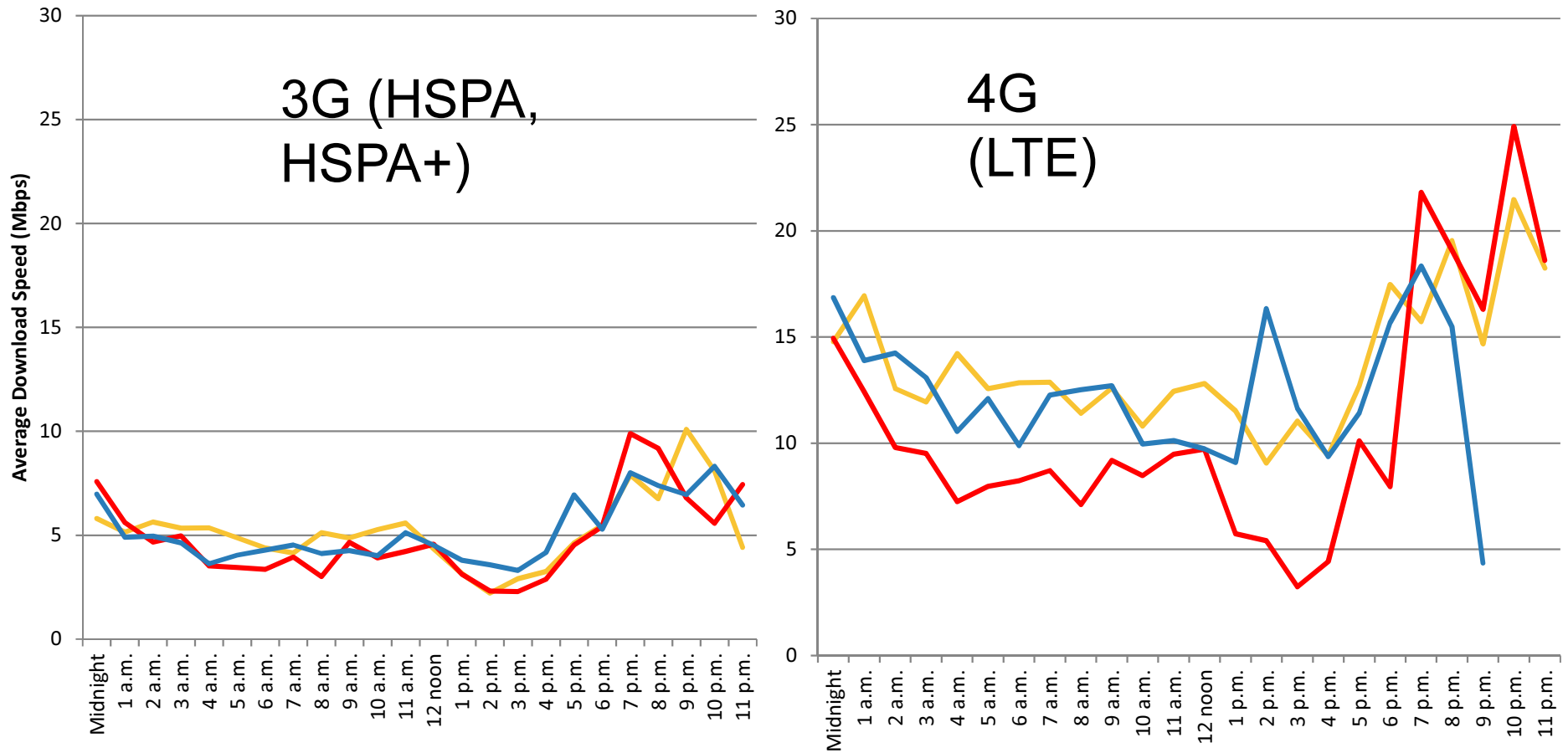
ASSESSING BROADBAND QUALITY OF SERVICE EXPERIENCE

A crowd-sourced approach: #BetterInternet campaign run by MIDO via social media

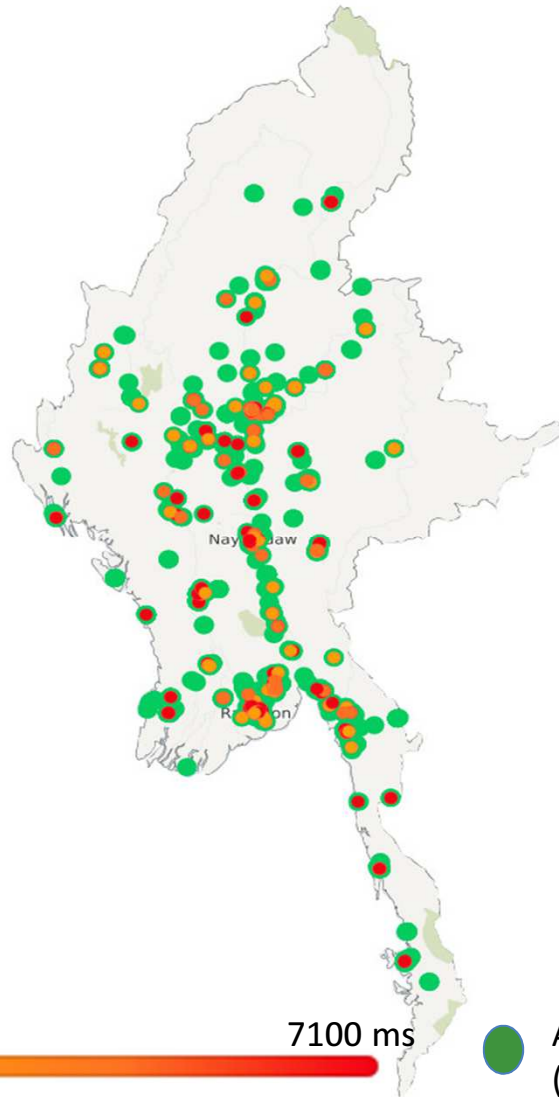
- 9000+ results covering all states/divisions of Myanmar
- Incentives
 - Contributing to “better Internet” in Myanmar
 - Being able to test network speeds whenever they want (not limited to duration of campaign)
 - Lucky draws



Download speeds; technology matters



Why does latency matter? Problematic across locations & operators

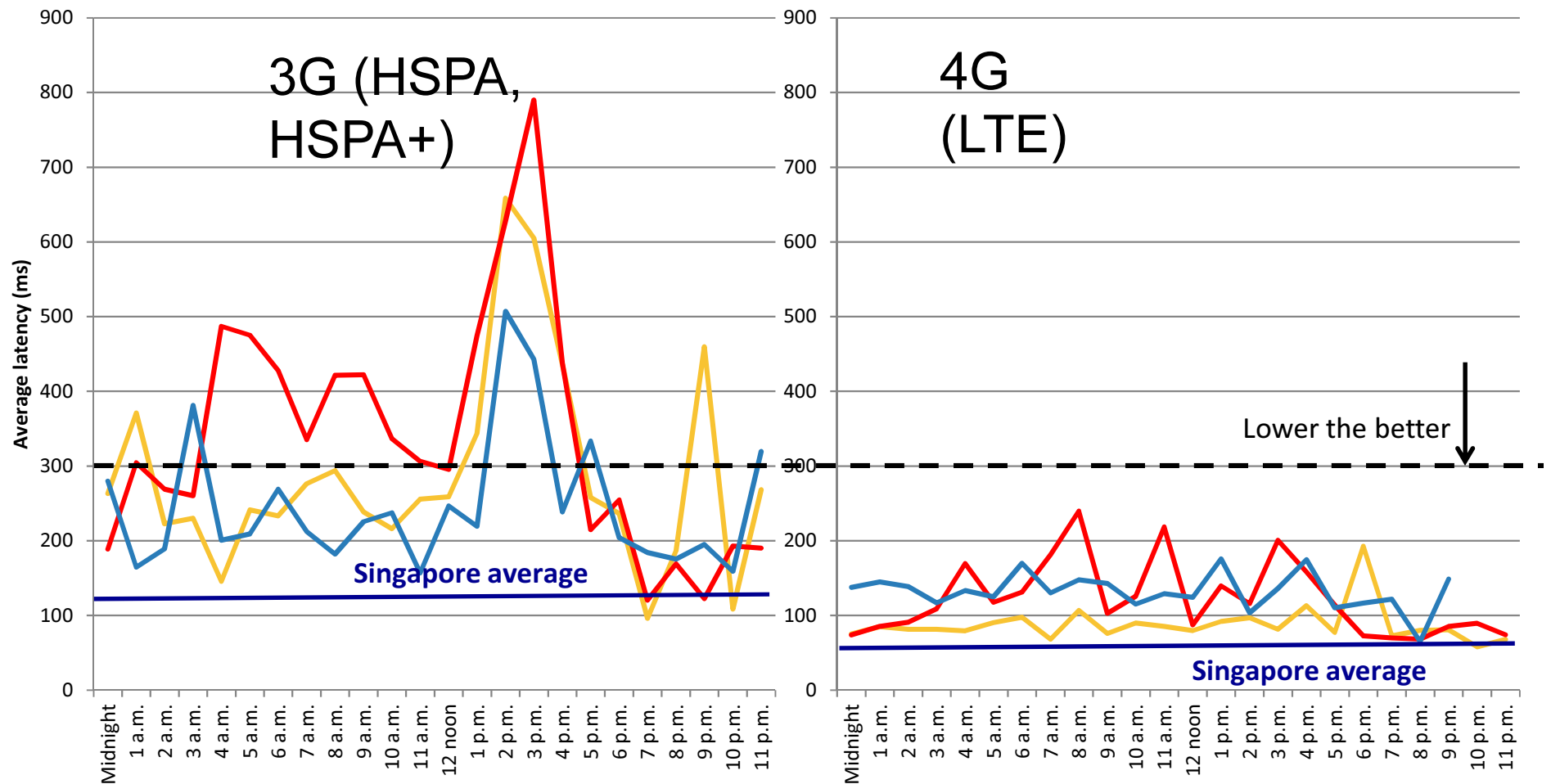


Service	Download (kbps)	Latency (ms)
Browsing (Text)	++	++
Browsing (Media)	+++	++
Downloading	+++	-
Transactions	-	++
Streaming media	+++	++
VOIP	+	+++
Games	+	+++

+++ Highly relevant; ++ Very relevant; + Relevant; - Irrelevant

(Source: Gonsalves, T.A & Bharadwaj, A., 2009)

Markedly better over 4G but improvements needed



**BUILDING CAPACITY ESSENTIAL TO
ACHIEVE BROADBAND FOR ALL**

LIRNEasia's contributions

- Regulatory module for government officials & civil society, Nay Pyi Taw, August 2013
- Four-day residential course for civil society & government officials, Taungoo, October 2013
- Course for Union Legislators in Yangon, July 2014
- Courses for Regional Legislature and Union Legislators, June 2016
- Regulatory experience sharing with staff of PTD, September 2017

