



**Southeast Asia and Oceania  
Telecommunication Industry Report,  
2010-2011**

**Apr. 2011**

## ***This report***

- ◆ **Analyzes overall telecommunication industry in Southeast Asia and Oceania.**
- ◆ **Focuses on industrial development strategy of telecommunication business.**
- ◆ **Highlights the competition, policy supervision, development strategy and major operators of telecommunication industry in 13 countries in Southeast Asia and Oceania.**

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## Abstract

Singapore boasts the highest level of telecommunication development and the most comprehensive service coverage in Southeast Asia. Along with the in-depth application of 3G during the recent years, the 3G user market in Singapore has maintained the stable and rapid growth.

Moreover, countries like Bengal, Thailand, and Malaysia characterize booming telecommunication industry and have blossomed into the focus of Southeast Asian telecommunication industry.

Australia and New Zealand feature the open competition environment, which has activated the telecommunication market and attracted a lot of foreign capitals.

### Number of Telecom Subscribers in Southeast Asia and Oceania by Country, 2010 (Unit: mln)

Country	Telephone	Mobile Phone	Internet
Singapore	1.98	7.31	7.96
Thailand	7.01	69.69	2.67
Bengal	1.72	71.51	--
Sri Lanka	3.58	17.36	0.28
Australia	10.59	25.99	9.6

Up till Q4 2010, the household popularization rate of telephone in Singapore had rested on 102.9%, the number of 3G subscribers had surpassed 4.70 million, and the number of broadband users had approached 8 million. SingTel, the largest integrated telecommunication operator in Singapore as well as the biggest telecom operator in Asia-Pacific region excluding China and Japan, is in possession of the maximum Internet backbone network in South Asia and enjoys at least 95% telephone shares and 40% mobile phone shares in Singapore market.

In Q3 2010, the per capita occupancy rate of telephone subscribers in Thailand hit 10.48%, and that of mobile phone subscribers was 104%; broadband business also witnessed fast development and the coverage of broadband users in 2010 reached 38.13%. CAT and TOT, the two big state-owned operators of Thailand telecommunication industry, dominate the domestic telecom operation market. Thailand characterizes the comparatively large import & export gap of telecom devices and relatively low popularization rate of telecom business; yet the progress of tourism has brought along huge development potentiality to the demand of international business and mobile business.

The economically backward Sri Lanka witnesses slow development of telephone business but comparably sound progression of mobile phone business. At the end of 2010, the quantity of mobile subscribers in Sri Lanka accounted for 83% of the total number of telephone subscribers, and the CAGR of wireless users arrived at 45%. The broadband Internet market in Sri Lanka remains small with the Internet users merely 280K in 2010, primarily due to the relatively high Internet access tariff. As the economy advances, the broadband Internet business in Sri Lanka will probably embrace rapid growth.

Australia telecom market features extremely high degree of openness and absent limitation on the number of business license. Owing to the vast territory and sparse population, the telecom network in Australia is unevenly covered, and satellite access in rural and remote areas occupies the higher proportion. The CATV network in Australia is controlled by telecom operators, cable modem access has once held the lion's share in broadband access, however, the booming XDSL has seized 2/3 market share in recent years. In 2010, the coverage of telephone, mobile phone, and broadband respectively hit 100%, 99%, and over 100% in Australia.

The report probes into the overall telecommunication market, industrial development strategy, telecommunication business, main operators, etc. of the 11 major countries in Southeast Asia consisting of Singapore, Vietnam, Thailand, and Bengal, as well as the 2 countries of Australia and New Zealand in Oceania. The research fields cover telephone business, mobile communication business, and broadband Internet business.

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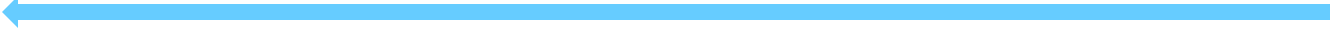
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