EXECUTIVE SUMMARY

Broadband is growing rapidly almost everywhere in Southeast Asia, especially in the fast-growing markets of China, Singapore, and Vietnam. In terms of access technologies, DSL is the most popular access medium, while cable networks are developing a strong presence. Wireless technologies are also beginning to make their mark, with rollouts of WiFi helping to boost the uptake of high-speed Internet.

Government initiatives in some parts of the region have already been taken to accelerate the rollout of broadband to where it is today, and should help ensure that Southeast Asia maintains its broadband lead. But the phenomenal growth of broadband belies the persistent – and still yawning – digital divide. In China, for example, the majority of the connected population lives in urban areas, highly concentrated in the eastern part of the country. The government has outlined some objectives that should help the rollout of broadband: It has brought telephone service to 95 percent of villages, and its long-term goal is to connect all businesses and households to the public network by 2020.

Although work is underway in Southeast Asia’s most sophisticated markets to create the applications of the future, the search is also on to find killer applications for broadband today. Applications such as video conferencing, online banking, and broadcast television can all benefit from broadband. One key application of broadband that has taken off across the region is voice over Internet Protocol (VOIP). China Unicom – one of that country’s full-service operators – has launched an extensive VOIP network, serving 300 cities. Fixed-line carriers China Telecom and China Netcom have responded by building their own VOIP networks.

In much of Southeast Asia, however, the prospects for rolling out broadband are limited by the lack of fixed-line infrastructure. Wireless broadband technologies are already used in densely populated urban areas in a number of countries across the region, often in combination with other broadband technologies. A number of Southeast Asian economies, including China, are pushing ahead with the development and adoption of advanced wireless broadband technologies, such as long-range WiMax (802.16) or iBurst – which is currently being deployed in Australia.

Broadband in Southeast Asia: Prospects for Growth presents a groundbreaking and comprehensive view of telecom service use and the state of broadband service activity in the world’s largest telecom market. The cornerstone of this report is an exclusive survey of major carriers in China, Malaysia, the Philippines, Singapore, Thailand, and Vietnam, gathering information about current and future broadband service deployment.

The report includes complete breakouts of service offerings by country and individual carrier, as well as broadband usage growth forecasts for key emerging national markets, as shown in the following excerpts.
The report includes profiles and data on broadband services available in Southeast Asia from the following service providers:

**China:**
- China Mobile Ltd. (NYSE: CHL)
- China Netcom Corp. Ltd. (NYSE: CN)
- China Telecom Corp. Ltd. (NYSE: CHA)
- China TieTong Telecommunications Corp.
- China Unicom Ltd. (NYSE: CHU)
- Chongqing Changfeng Communication Co. Ltd.
- FibrLINK Communications Co. Ltd.
- Beijing Gehua Cable TV Networks Co. Ltd.
- Great Wall Broadband Network Service Co. Ltd.
- Chengdu Tailong Communication Co. Ltd.
- Shanghai Unionnet Broadband Investment Co. Ltd.
Malaysia:  Maxis Communications Bhd. (Malaysia: MAXIS)
          Telekom Malaysia Bhd. (Malaysia: TM)

Philippines:  Bayan Telecommunications Inc. (BayanTel)
             Meridian Telekoms Inc.
             Philippines Long Distance Co. (PLDT) (NYSE: PHI)

Singapore:   iCell Network Pte. Ltd.
             Pacific Internet Ltd. (Nasdaq: PCNTF)
             QMax Communications Pte. Ltd.
             Singapore Telecommunications Ltd. (Pink Sheets: SGTJY; Singapore: STEL)
             StarHub Ltd. (Pink Sheets: SRHBF)

Thailand:    Shin Satellite Public Co. Ltd. (Thailand: SATTEL)
             TOT Public Co. Ltd.
             True Corporation Public Co. Ltd. (Thailand: TRUE)

Vietnam:     The Corporation for Financing and Promoting Technology (FPT)
             Vietnam Post and Telecommunications Group (VNPT)

Report Scope & Structure
Broadband in Southeast Asia: Prospects for Growth is structured as follows:

Section I is an introduction to the report, with complete report key findings.

Section II provides an overview of Southeast Asia's broadband service activity, trends, and prevailing conditions for Carrier Ethernet adoption.

Sections III through VIII examine Southeast Asia's various telecom markets, including profiles of prominent broadband service providers in each country. In order, the countries profiled are: China, Malaysia, the Philippines, Singapore, Thailand, and Vietnam.

Broadband in Southeast Asia: Prospects for Growth is essential reading for a wide range of industry participants, including the following:

- **Wireline and mobile broadband technology suppliers:** How will broadband deployments ramp up in the key national markets in Southeast Asia? Which technologies are carriers most likely to deploy in those individual markets? Where are the most likely opportunities for your company in Southeast Asia?

- **Telecom service providers:** How will growth of broadband deployment in Southeast Asia affect demand for international bandwidth in the region? Which network operators are already moving into the Southeast Asia market to strike partnerships with local operators? Where are the best opportunities to find carrier partners in the region?

- **Investors:** Which technology suppliers and network operators are in the best position to thrive in the Southeast Asia market in the months and years ahead? Which companies are emerging as the perceived leaders in this region, and which ones are likely to struggle for market share?

Broadband in Southeast Asia: Prospects for Growth is published in PDF format.