

International Telecommunication Union



Asia-Pacific
TELECOMMUNICATION
INDICATORS



INTERNATIONAL TELECOMMUNICATION UNION



Asia-Pacific
Telecommunication
Indicators



ASIA-PACIFIC TELECOMMUNICATION INDICATORS 2002

ASIA-PACIFIC
TELECOMMUNICATION
INDICATORS
New Telecommunication Operators



INTERNATIONAL TELECOMMUNICATION UNION
TELECOMMUNICATION DEVELOPMENT BUREAU

1997



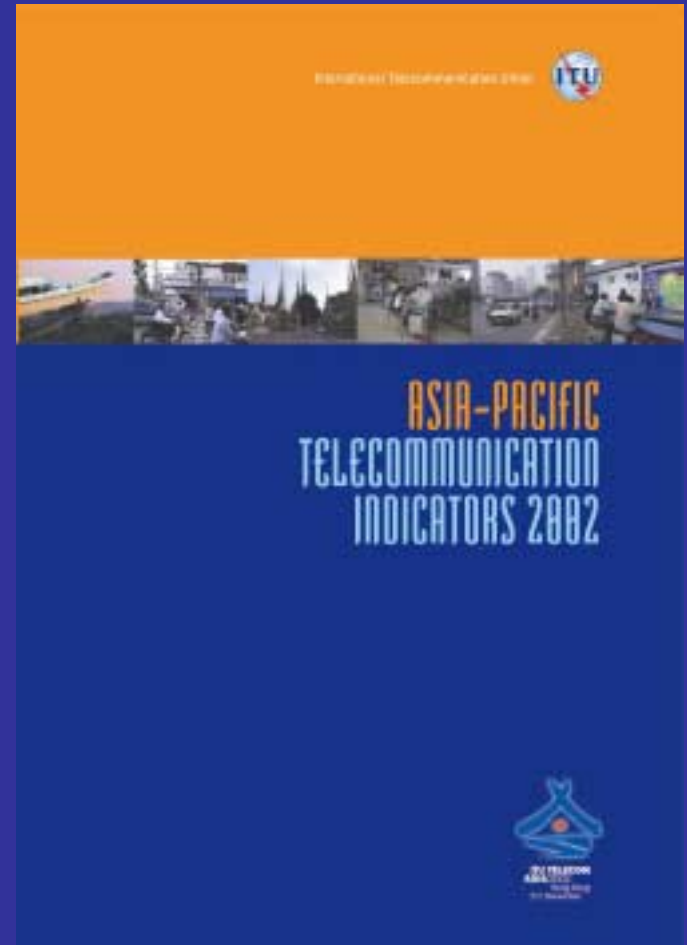
ASIA
PACIFIC
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INDICATORS



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About

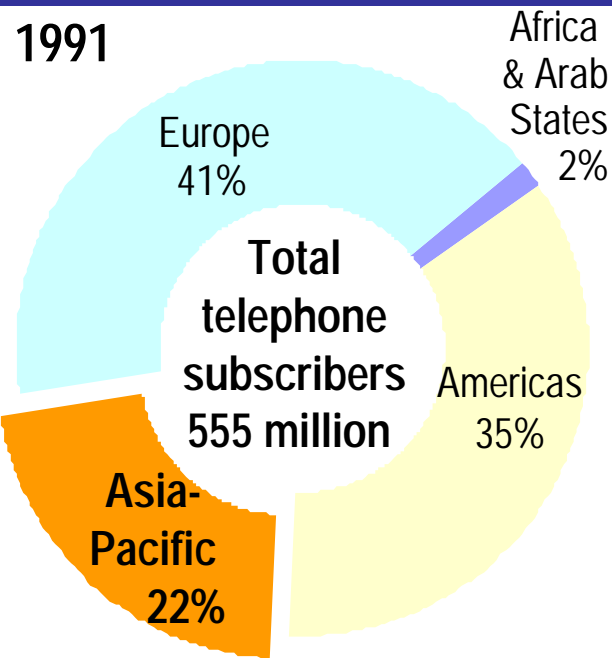
- Published 2 December 2002
- 114 pages
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 - Asia revisited
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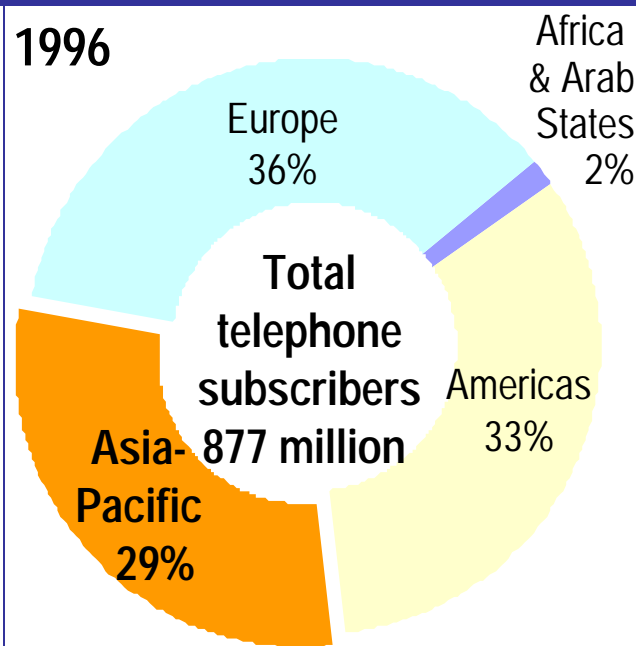
Asia revisited: The epicenter of the telecom world

The world's largest telecommunication market

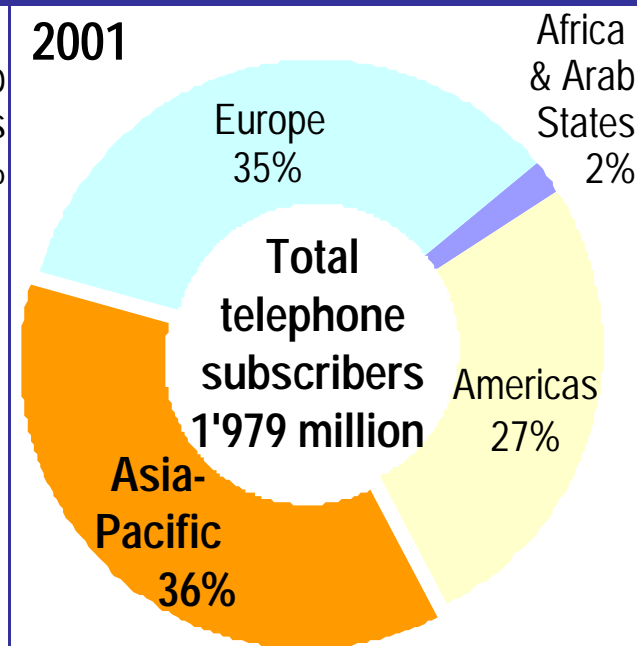
1991



1996



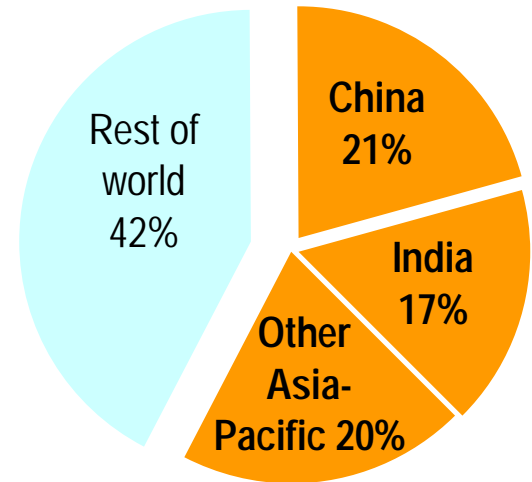
2001



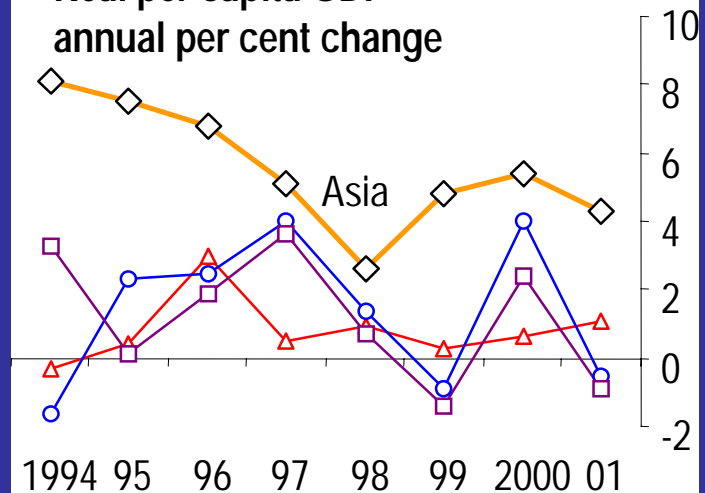
Geography, economy and dynamism

- There are three principal reasons for the region's rapid telecom evolution:
 1. Geography
 2. Economy
 3. Dynamism

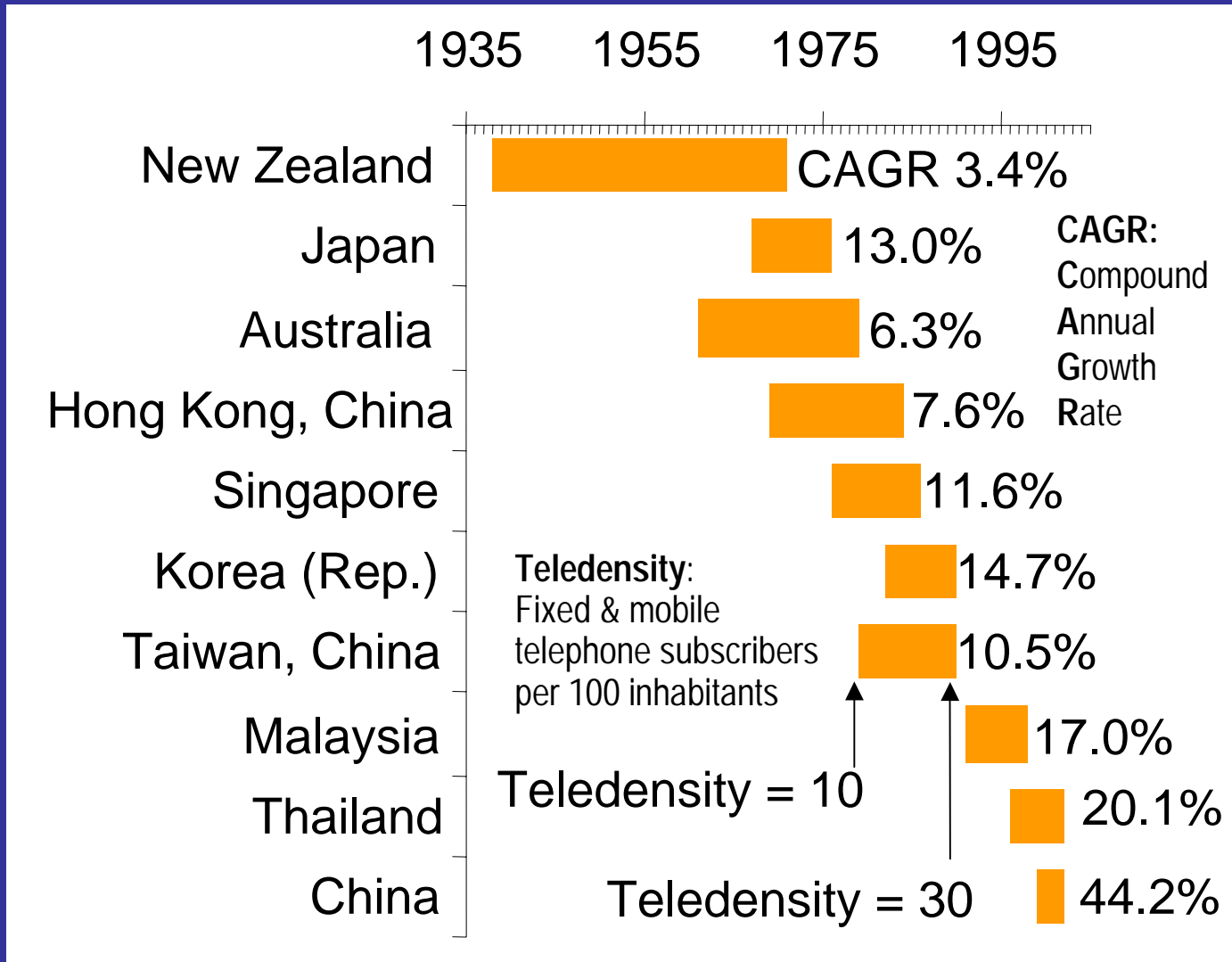
World population distribution, 2001



Real per capita GDP annual per cent change



Telecom transition

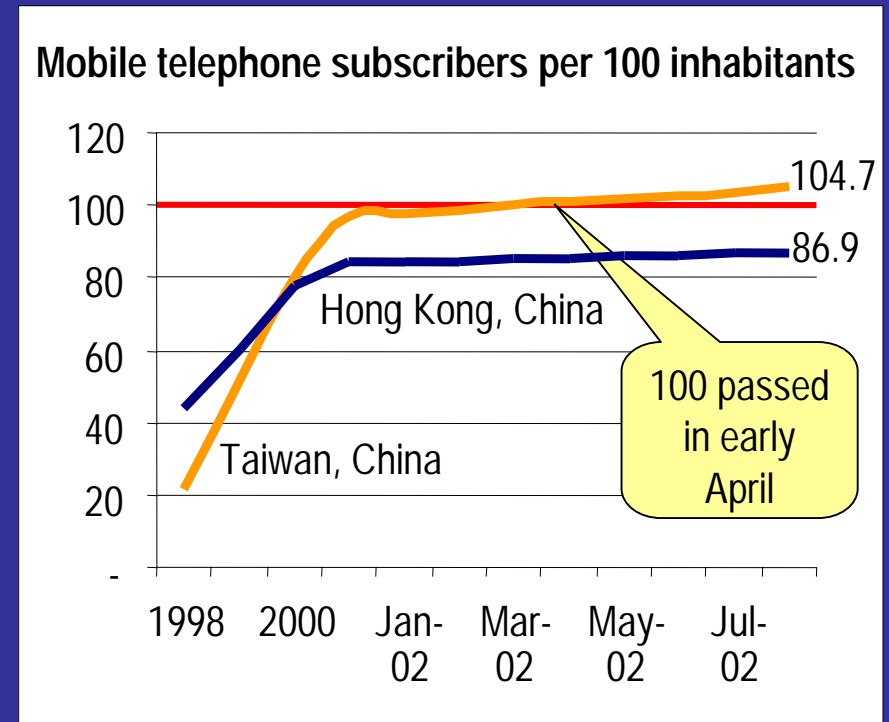


South Asia's Villages

	Villages			Village population		
	Number	Number with phone service	% with phone service	Total (000s)	Total with access to phone (000s)	% with access to phone
Bangladesh	86'000	12'568	15	103'441	31'420	30
Bhutan	<i>6'000</i>	N/A	N/A	636	N/A	N/A
India	607'491	468'016	77	741'660	726'827	98
Maldives	200	200	100	196	196	100
Nepal	3'914	1'761	45	19'457	8'754	45
Pakistan	125'083	<i>12'000</i>	<i>10</i>	97'855	<i>29'357</i>	30
Sri Lanka	<i>23'000</i>	<i>2'475</i>	<i>11</i>	13'113	<i>9'834</i>	75
Total	851'688	497'020	58	976'358	806'388	83

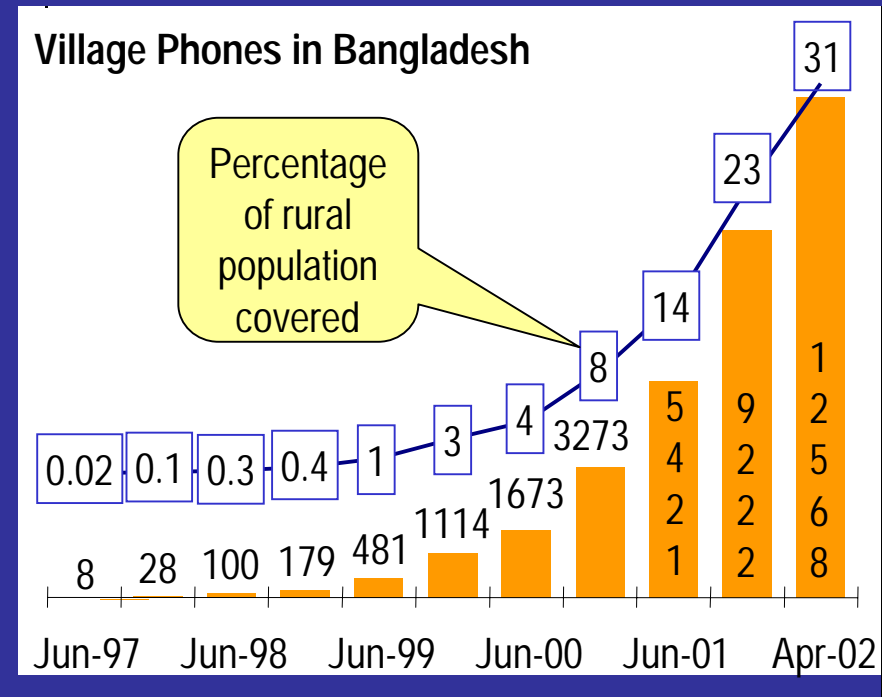
High-growth, high-speed Mobile

- The region now leads the world in several important market categories:
 - Two of the top three mobile economies measured by mobile phones per capita
 - The world's biggest mobile economy
 - The mobile economy with the biggest potential for growth
- The region is also home to the economy with the largest number of:
 - mobile Internet users
 - high-speed (3G) mobile Internet users



Developing mobile

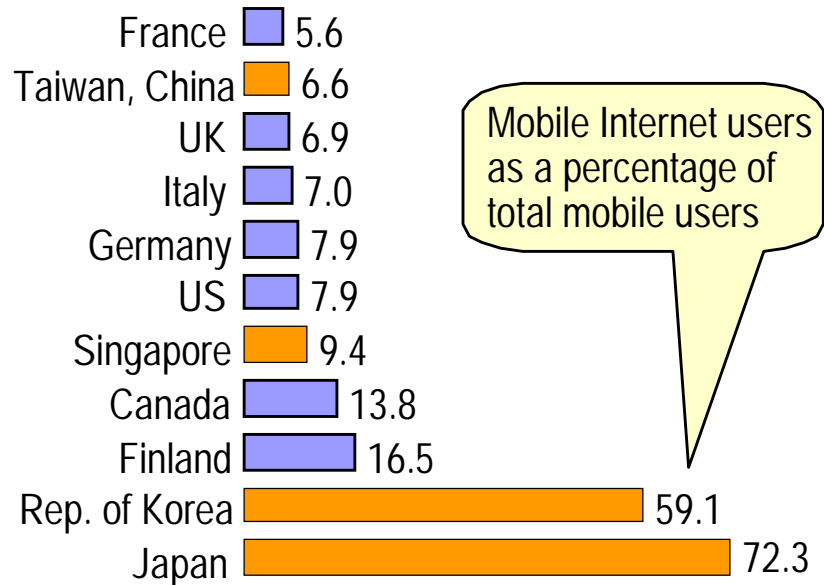
- Perhaps the biggest effects of mobile have come among the LDCs of the region:
 - In 1993 Cambodia became the first country in the world where mobile phones exceeded fixed-line connections. Today Cambodia has more than eight times more mobile phones than fixed-lines
 - In the Maldives, mobile overtook fixed in April 2002, just 2.5 years after the launch of digital mobile service
 - In Bangladesh, mobile overtook fixed during 2001, partly due to the innovative means of supplying village phones to expand community access



Mobile Internet

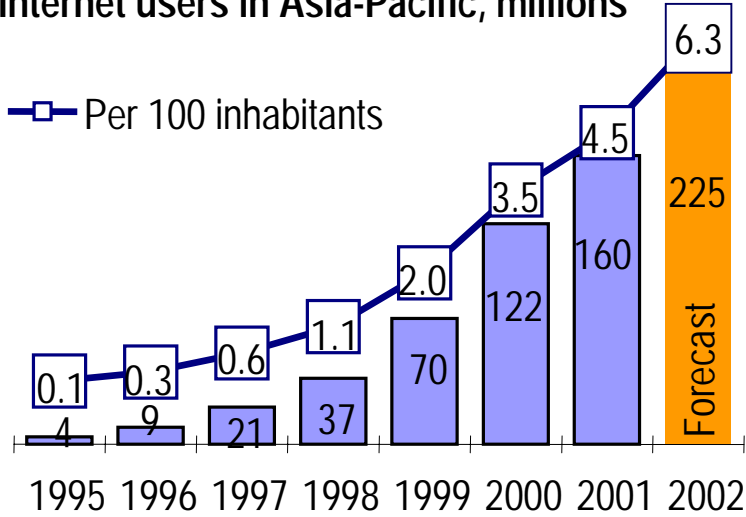
- Region leads the world in mobile Internet
- Japan and Republic of Korea first two nations in the world to launch 3G
- Hong Kong, China ranks top on ITU's Mobile Internet Index

Mobile Internet penetration, 2001

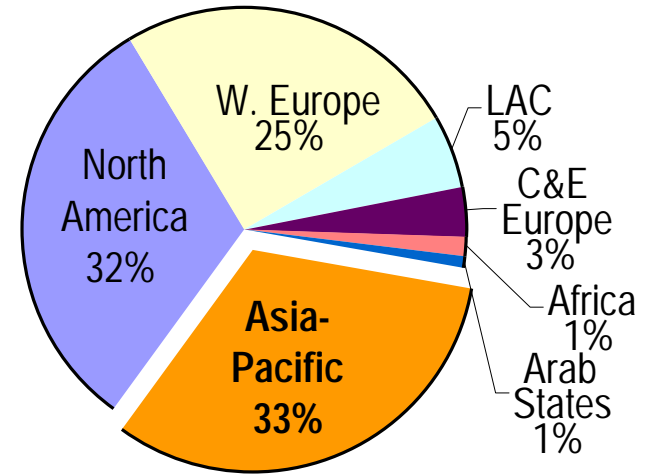


Asia in cyberspace

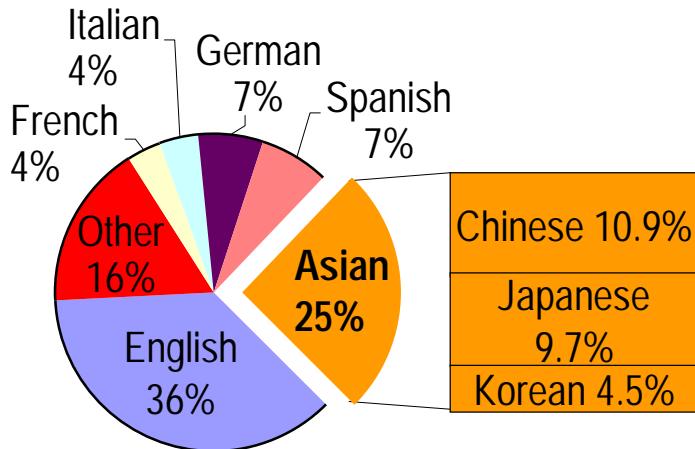
Internet users in Asia-Pacific, millions



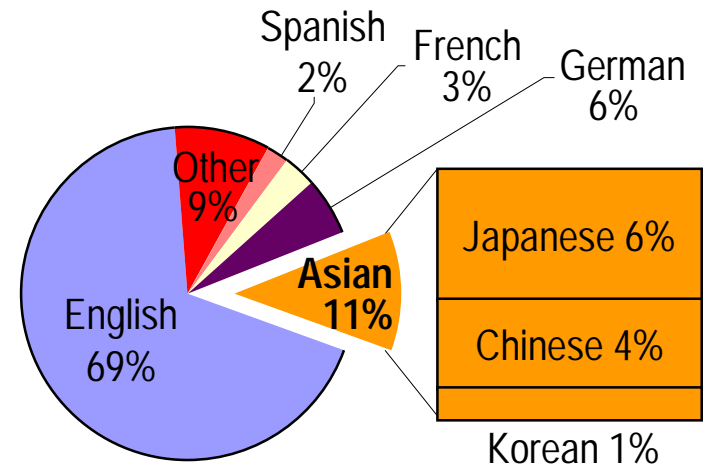
Distribution of Internet users, 2001



Internet users by language, September 2002

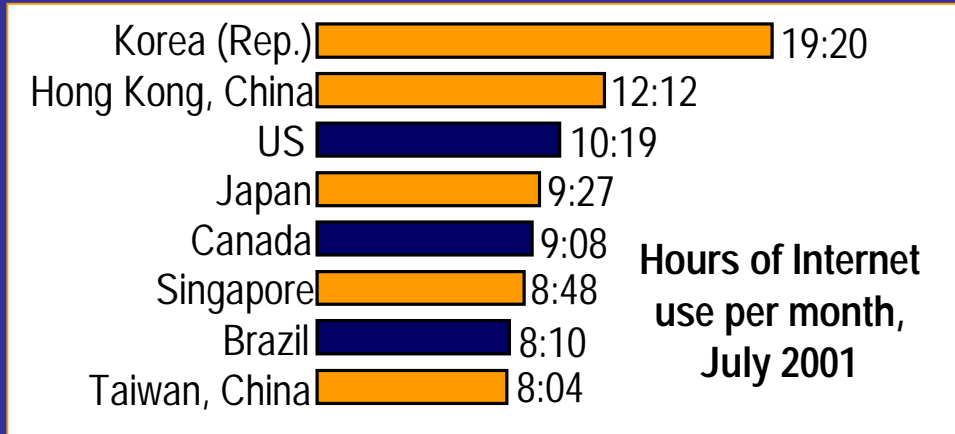


Web content by language, 2001



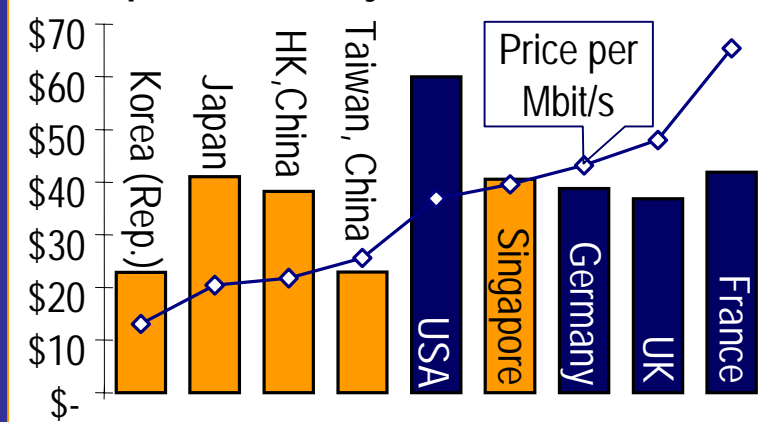
Broadband landscape

① The most intense Internet users in the world

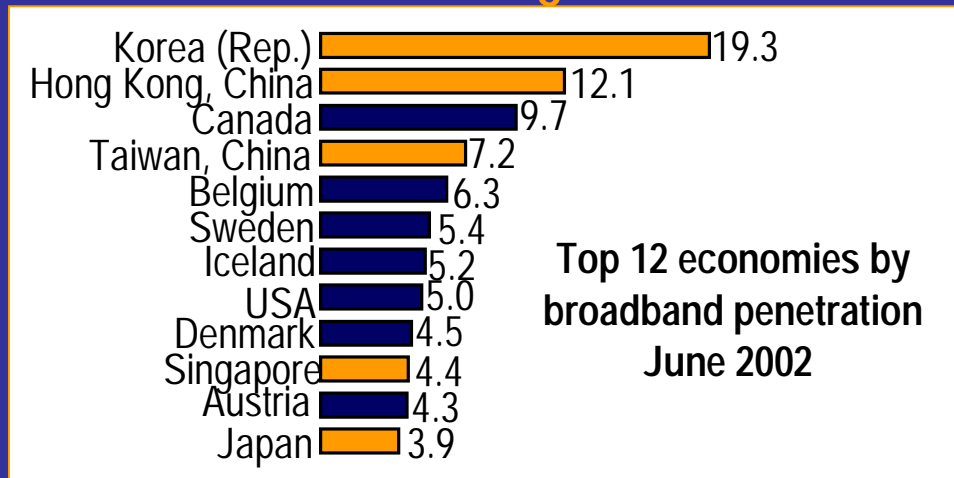


② The cheapest broadband prices

ADSL prices, monthly, US\$, 2002

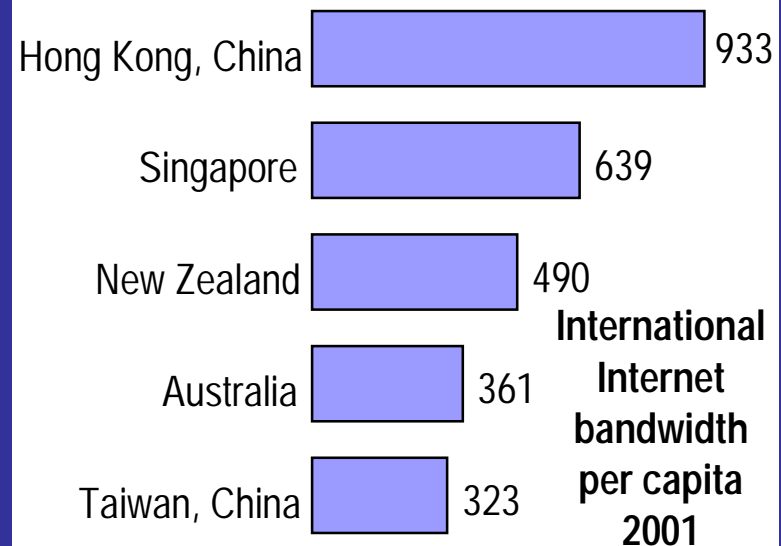
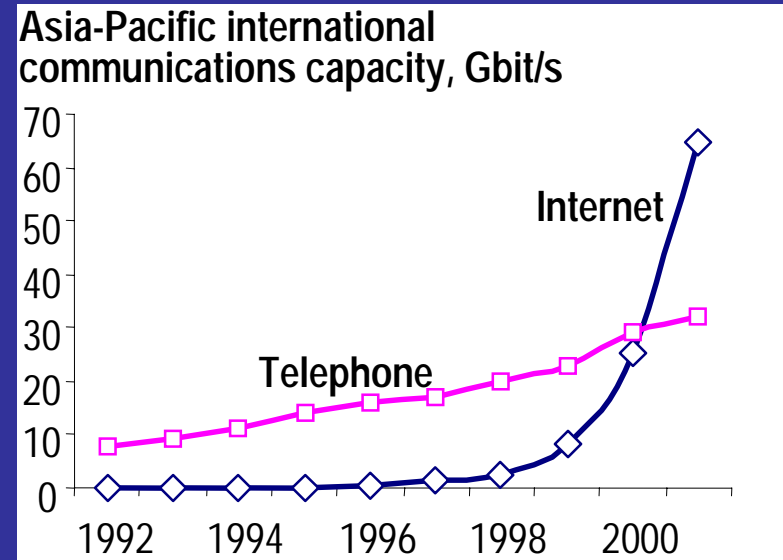


③ Makes the world's leading broadband economies



Bandwidth transition

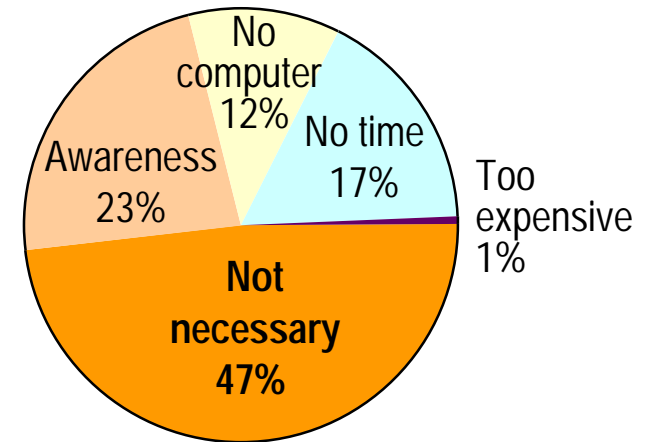
- Capacity on Internet links connecting Asia-Pacific to the world have skyrocketed more than eight fold over the last two years from eight gigabits (Gbit/s) to 65 Gbit/s by the end of 2001.
- International Internet capacity in the region now far exceeds conventional telephone capacity
- Hong Kong, China leads the region in overall Internet bandwidth index



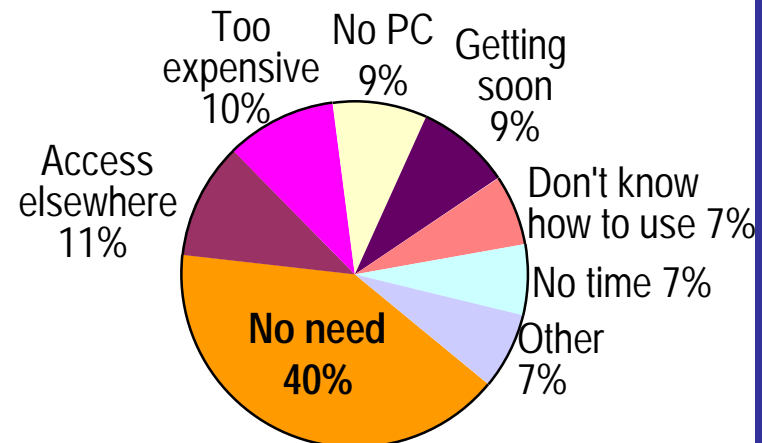
Where do we go from here?

- Is Internet growth slowing?
- The growth rate in the number of users in 2001 was 30%, the lowest level in the region since people began using the Internet.
- This is partly due to the more advanced economies reaching saturation.
- Even growth in developing Asia-Pacific dropped by half in 2001 compared to 2000 (from 113% to 51%).

Reasons for not using the Internet in Korea (Rep.), 2002



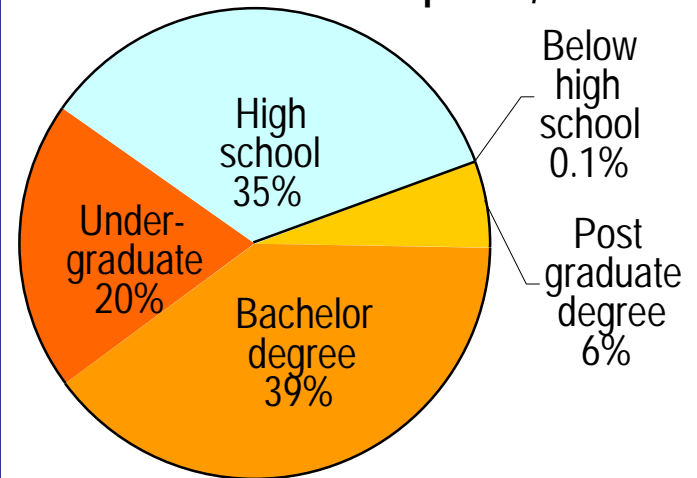
Reasons for not having home Internet access in Singapore, 2001



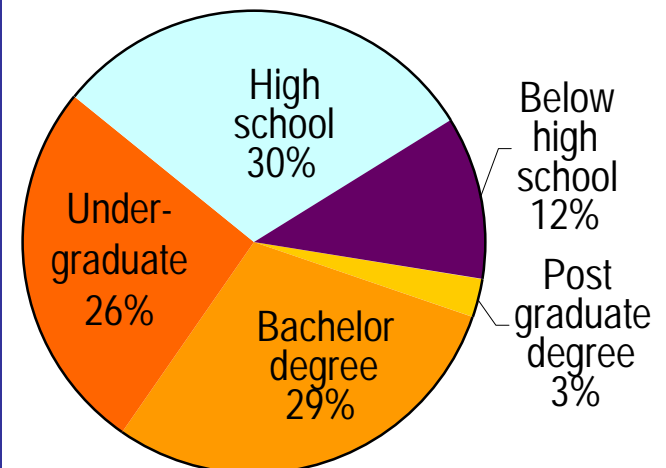
Internet and Education

- Awareness of the Internet, and the ability to use it successfully is highly dependent on education.
- The payoff from enhancing Internet access at universities can be great:
 - In the Philippines and Vietnam, Internet penetration could be doubled if all tertiary institutions had access
 - The payoff would be even greater in Laos and Cambodia where Internet penetration would increase by a magnitude of three and five respectively if all tertiary students had access

Indonesian Internet user profile, 2001



Chinese Internet user profile, 2002



From kilobits to megabrain: ICTs in education

*Music class at
Sunrin High, →
Korea (Rep.)*



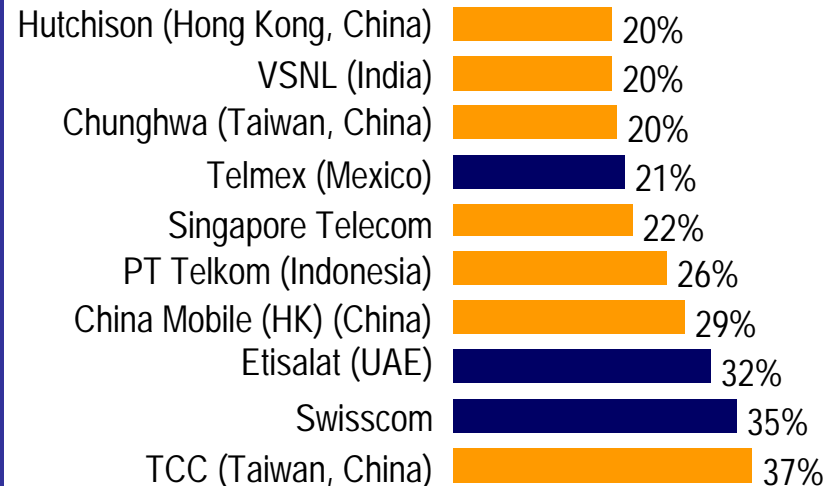
*Digital Art at Radin
← Mas Primary,
Singapore*

*Source: ITU
Internet
diffusion
case studies.*

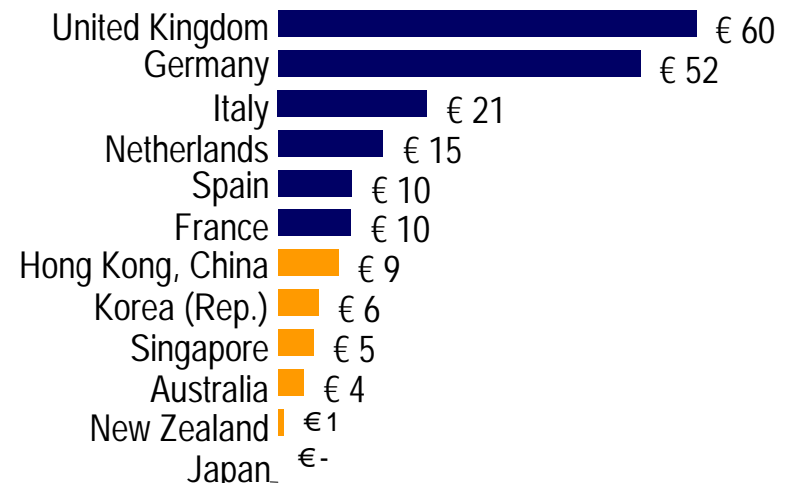
Asia's new world role

- Leading the way out of the telecom recession
- Setting the policy agenda
- Setting the corporate agenda

Top 10 operators by profit margin, 2001



Price per inhabitant of 3G mobile licenses, Euro



Towards a billion new subscribers

- The region's advanced economies face the challenge of increasing high-speed access to communication networks over the next few years. The Republic of Korea is forecasting that some 80 per cent of its households will have broadband by 2005. Assuming other advanced Asia-Pacific economies can meet that target, there will be some 50 million new broadband subscribers in the region by mid decade.
- Assuming that telecommunication networks in developing Asia-Pacific nations grow at just twelve per cent a year through the end of the decade, there will be over 800 million new telephone users in the region by 2010 and teledensity will rise from 13.7 to 34. This is a conservative estimate since the 1991-2001 growth rate was 33 per cent a year.



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