



ASIA-PACIFIC TELECOMMUNICATION/ICT INDICATORS 2008

Broadband in Asia-Pacific: too much, too little?

LAUNCHED AT ITU
TELECOM ASIA



ITU TELECOM
ASIA 2008
Bangkok
2-5 September

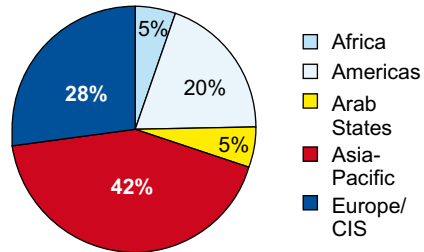


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Share of mobile cellular subscribers, by region, 2007 (%)



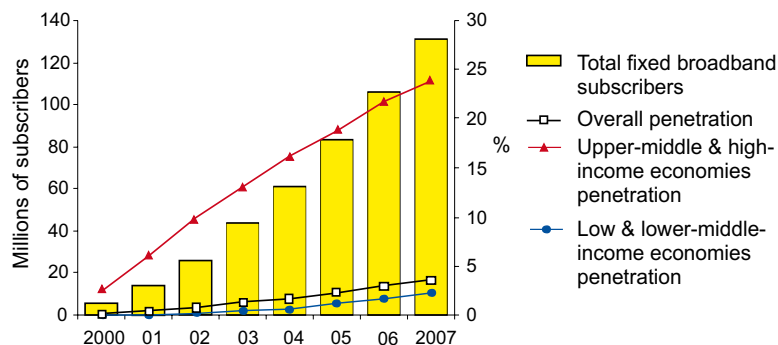
Source: ITU World Telecommunication/ICT Indicators Database.

In terms of Information and Communication Technologies (ICTs), Asia-Pacific is mind-boggling in many ways. It is home to almost half of the world's fixed telephone lines, and with over a billion mobile cellular subscribers, the region has the largest mobile phone market share globally.

By mid-2008, China and India alone had over 600 and 280 million mobile cellular subscribers, respectively, representing close to a quarter of the world's total.

The areas in which the region stands out most, however, are advanced Internet technologies, including broadband Internet access and mobile data communications. The region is home to many of the world's leading broadband economies, where sound policies and high levels of investment have led to thriving and highly competitive broadband markets.

Fixed broadband subscribers and penetration, Asia-Pacific, 2000-2007



Source: ITU World Telecommunication/ICT Indicators Database.

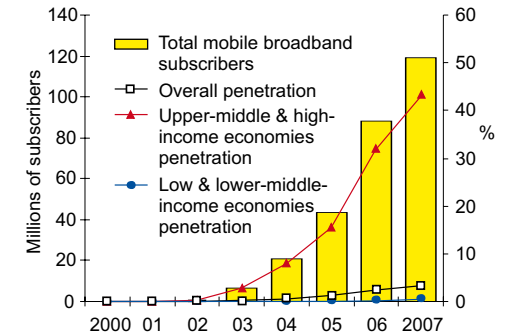
But while some people in the Asia-Pacific region are living the ultimate Internet high-speed experience, there is a stark contrast between the region's high-income economies on the one hand, and the low and lower-middle-income economies, on the other hand. In the latter group, the progression towards broadband is slow and Internet access is often limited and costly.

The sub-title of this publication **"Broadband in Asia-Pacific: too much, too little?"** makes reference to the significant divide that can be observed between economies with close to ubiquitous and affordable access and those where ICT applications are limited by narrowband networks.

Several countries have developed concrete broadband policies and targets, creating a favorable environment for broadband uptake. These include setting up a Universal Service Fund to finance broadband in underserved areas, including the necessary backbone, in India and Pakistan.

At the end of 2007, there were 119 million mobile broadband subscribers in the region with the large majority in upper-middle and high-income economies. Only few of the low and lower-middle-income economies have launched mobile broadband networks. For example, at the end of 2007, only Indonesia, the Philippines, Sri Lanka and Maldives had commercialized WCDMA networks. By mid-2008, the region's two largest mobile markets, China and India, had yet to launch mobile broadband.

Mobile broadband subscribers and penetration, Asia-Pacific, 2000-2007



Note: Mobile broadband refers to CDMA 1X EV/DO, WCDMA and HSDPA.

Source: ITU.

Just as mobile phones have increased access to basic voice communications, they are also increasingly being used for non-voice applications. Therefore, it is likely that the provision of mobile broadband services will grow, especially with 3rd generation mobile technology being supportive of broadband speeds.



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Key findings

Close to half of all broadband subscribers are from upper-middle and high-income economies and penetration rates vary from over 30 percent in the Republic of Korea, to ‘close to zero’ in a number of low-income economies. While there is a close link between national income and broadband availability, there are a number of specific barriers:

- The lack of international Internet bandwidth is a particular problem in land-locked and other countries without direct access to international fiber optic cable systems.
- Many economies have limited competition in terms of international gateways, leased lines and the provision of local services – the building blocks for an operator to be able to set up a broadband business.

The report identifies various steps that the region’s policymakers can take to accelerate broadband development, including:

- Establish broadband strategies and policies, with meaningful targets and goals, implementation plans and incentives for achieving rapid broadband deployment.
- Move quickly to award spectrum for wireless broadband such as 3rd generation mobile or fixed wireless technology.
- Utilize Universal Service Funds to distribute broadband to rural and underserved areas.

Beside the analytical part, the Report includes:

- **Some 20 regional tables covering key telecommunication/ICT indicators (2006/2007 data)**
- **43 individual economy pages with a five-year profile (2002-2007)**
- **A list of telecommunication ministries, regulators and operators in the region**