

Broadband Infrastructure in North Asia and Central Asia

**Markets, Infrastructure, and Policy Options for
Enhancing Cross-Border Connectivity**

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Part 1: Background and Methodology

Project Scope

Between June and November 2013, Terabit Consulting performed a **detailed analysis of broadband infrastructure and markets in 7 strategic markets in No. & Central Asia:**

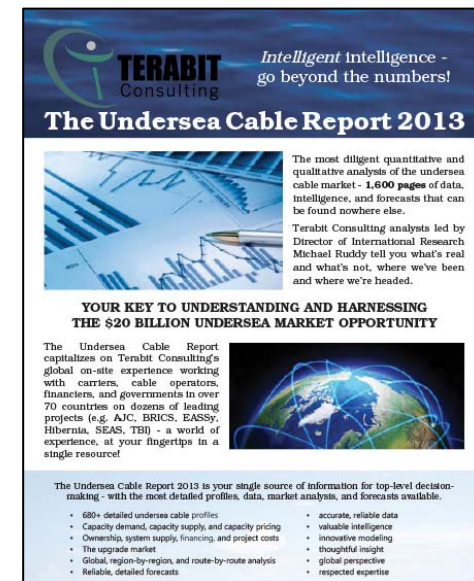


Scope (cont'd.)

- **The data and analysis for each country included:**
 - ✓ **Telecommunications market overview and analysis of competitiveness**
 - ✓ **Regulation and government intervention**
 - ✓ **Fixed-line** telephony market
 - ✓ **Mobile** telephony market
 - ✓ **Internet and broadband** market
 - ✓ **Consumer broadband pricing**
 - ✓ Evaluation of **domestic network** connectivity
 - ✓ **International Internet bandwidth**
 - ✓ **International capacity pricing**
 - ✓ Historical and forecasted **total international bandwidth**
 - ✓ Evaluation of **international network connectivity** including terrestrial fiber, undersea fiber, and satellite
 - ✓ Evaluation of **trans-border network development** and **identification of missing links**
 - ✓ Identification of key **highway and rail projects**

Sources of Data

- Terabit Consulting has completed dozens of demand studies for submarine and terrestrial fiber networks worldwide
 - Constant contact with operators, ISPs, and other stakeholders
- Terabit Consulting's published reports include:
 - *The Undersea Cable Report* (1,500+ pages)
 - *International Telecommunications Infrastructure Analysis* (1,000+ pages)
- Terabit Consulting's data and intelligence covers infrastructure, demand, traffic flows, pricing, and market share

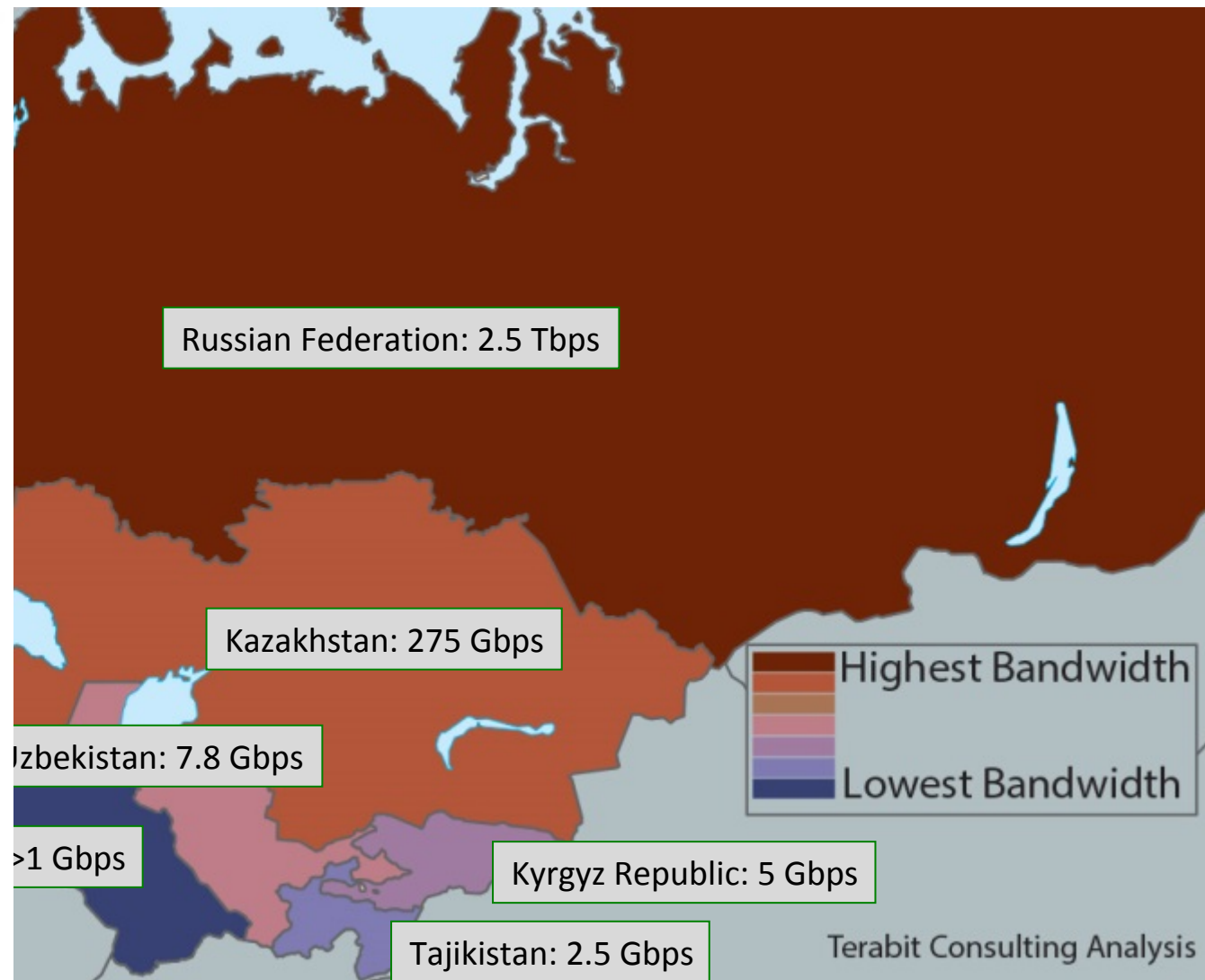


Part 2: State of North and Central Asia Bandwidth and Broadband Markets

Overview of Broadband Status

| | GDP per Capita, YE 2012 (PPP, USD) | Int'l. Band-width per Capita (Kbps) | Int'l. Connect-ivity | Domestic Connect-ivity | IP Transit Price | Competitive-ness of Telecom Market | Fixed and Mobile Broadband Infra-structure | Annual 1 Mbps Broadband Subscription + Installation as % of Nominal GDP per Capita |
|--------------------|------------------------------------|-------------------------------------|----------------------|------------------------|-------------------|------------------------------------|--|--|
| Azerbaijan | \$10,800 | 22.4 | Moderate | Adequate | Reasonably Priced | Somewhat Competitive | Relatively Strong | Reasonable |
| Kazakhstan | \$14,000 | 16.5 | Moderate | Relatively Strong | Reasonably Priced | Somewhat Competitive | Relatively Strong | Reasonable |
| Kyrgyz Republic | \$2,400 | 0.893 | Weak | Limited | Very Expensive | Somewhat Competitive | Limited | Very Expensive |
| Russian Federation | \$20,900 | 17.4 | Moderate | Relatively Strong | Inexpensive | Competitive | Strong | Extremely Affordable |
| Tajikistan | \$2,300 | 0.313 | Weak | Limited | Very Expensive | Somewhat Competitive | Very Limited | Very Expensive |
| Turkmenista n | \$9,600 | 0.125 | Weak | Limited | Very Expensive | Not Competitive | Very Limited | Very Expensive |
| Uzbekistan | \$3,500 | 0.259 | Weak | Limited | Very Expensive | Somewhat Competitive | Limited | Very Expensive |

onal Internet Bandwidth, YE12



https://www.yunbaogao.cn/report/index/report?reportId=5_5998

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