

Expanding Regional Connectivity in Asia and the Pacific:

- I. Broadband Markets: State-of-Play**
- II. International Network Vulnerabilities**
- III. Terrestrial Infrastructure Initiatives,
Opportunities, and Challenges**

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Part 1: Broadband State of Play in Hub Markets

Broadband State of Play in 5 “Hub” Markets

ESCAP Subregion

Market

East and Northeast Asia

China

South and Southwest Asia

India

North and Central Asia

Russia

The Pacific

Australia

Southeast Asia

Singapore

China

- China shows the strongest prospects for growth in the region
 - China is already the world's largest broadband market, having surpassed the US in 2008
 - Currently 10x more fixed-broadband subscribers than India
 - Fixed-broadband subscribers will exceed 200 million by 2014
 - 1.4 Tbps of international demand as of year-end 2011
- In terms of international bandwidth demand, still trailing Japan (>2 Tbps) for the time being

China: Broadband Targets

- 12th Five-Year Plan calls for broadband speeds to increase to 20 Mbps in urban areas and 4 Mbps in rural areas by the end of 2015
 - More than 8m fiber kilometers deployed; robust FTTx market of 25m+ (although DSL still dominant)
- Ministry of Industry and Information Technology indicated intention to lower broadband access pricing
- ARPU of US\$11 per month, while comparatively low, should still allow for investment in 4G networks

India

- Extremely promising broadband growth, but timing uncertain
- 3G service launch was marred by weak coverage, incompatible handsets, and “bill shock”
 - Watching 1-hour sporting event on 3G = 300 INR (\$5)
- Reliance planning nationwide \$10 bil 4G rollout
 - But some foreign 3G/4G investors have pulled out of market, citing “regulatory uncertainty”
- Fixed-broadband market: 100Mbps VPON FTTH service launched in 2011
 - However, affordable packages were limited to 2Mbps (and 8GB/mo). Unlimited 100Mbps was priced at \$1,500
- India’s middle- and upper-class (\$4k+/household/yr.), while growing, is less than 20% of population
- ‘In-between class’ (\$1k-\$4k/household/yr.) has remained steady at more than 60% of population ==> greatest growth potential

Russia

- Total international bandwidth reported to be as high as 2 Tbps as of year-end 2011
- Demand is largely westward - only a small percentage of international demand is routed through Russia's east
- Russian Internet content market is not yet mature
 - Localization of western content prevails
- Russian-language content, combined with westward international connectivity, makes Russia a hub for traffic from CIS countries
- Much of the country's terrestrial fiber investment has focused on the China-Russia route in order to capture Europe-Asia transit
 - One China-Russia network operator claims that it has been able to charge a premium of up to 300% for low-latency routes

Australia

- \$40 billion Australian National Broadband Network (NBN) underway
 - More than 3.5 million residences and businesses set to be connected by fiber by 2015
 - FTTx connectivity serving more than 90 percent of the population by 2021
 - 1 Gbps target speed to the home
 - Potential to be severely disruptive technology
- Limited number of carriers in Australia/New

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https://www.yunbaogao.cn/report/index/report?reportId=5_7442

