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ASEAN Internet: ITU Case Studies

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International Telecommunication Union

- UN agency for telecommunications
- 189 member states; 650+ other companies & organizations
- Based in Geneva, Switzerland. Asian regional offices in Bangkok and Jakarta
- Telecom Development Bureau responsible for promoting telecom in developing countries

www.itu.int





ITU Internet Studies

- Reasons
 - Improve market information
 - Examine factors influencing / restricting Internet diffusion
 - Recommendations
- First round
- Other case studies

Web site:

www.itu.int/ti/casestudies





Internet Case Study Contents

- Country Overview
- Telecom sector
- Media sector
- Internet market
- Use in government, health, education and business
- Recommendations



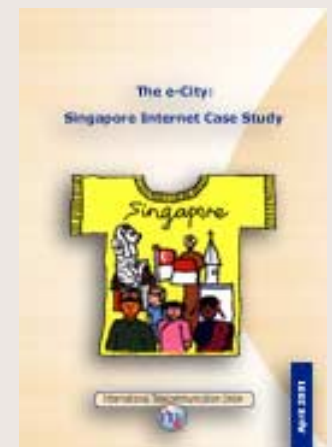
Status of ASEAN studies

Country	Field work (Study completed)
Singapore	July 2000 (April 2001)
Malaysia	March 2001 (September 2001)
Indonesia	May 2001 (September 2001)
Vietnam	May 2001 (September 2001)
Cambodia	July 2001 (September 2001)
Thailand	<i>August 2001 (December 2001)</i>
Laos	<i>October 2001 (December 2001)</i>
Philippines	<i>November 2001 (December 2001)</i>
<i>Note: Brunei and Myanmar dependent on resources.</i>	



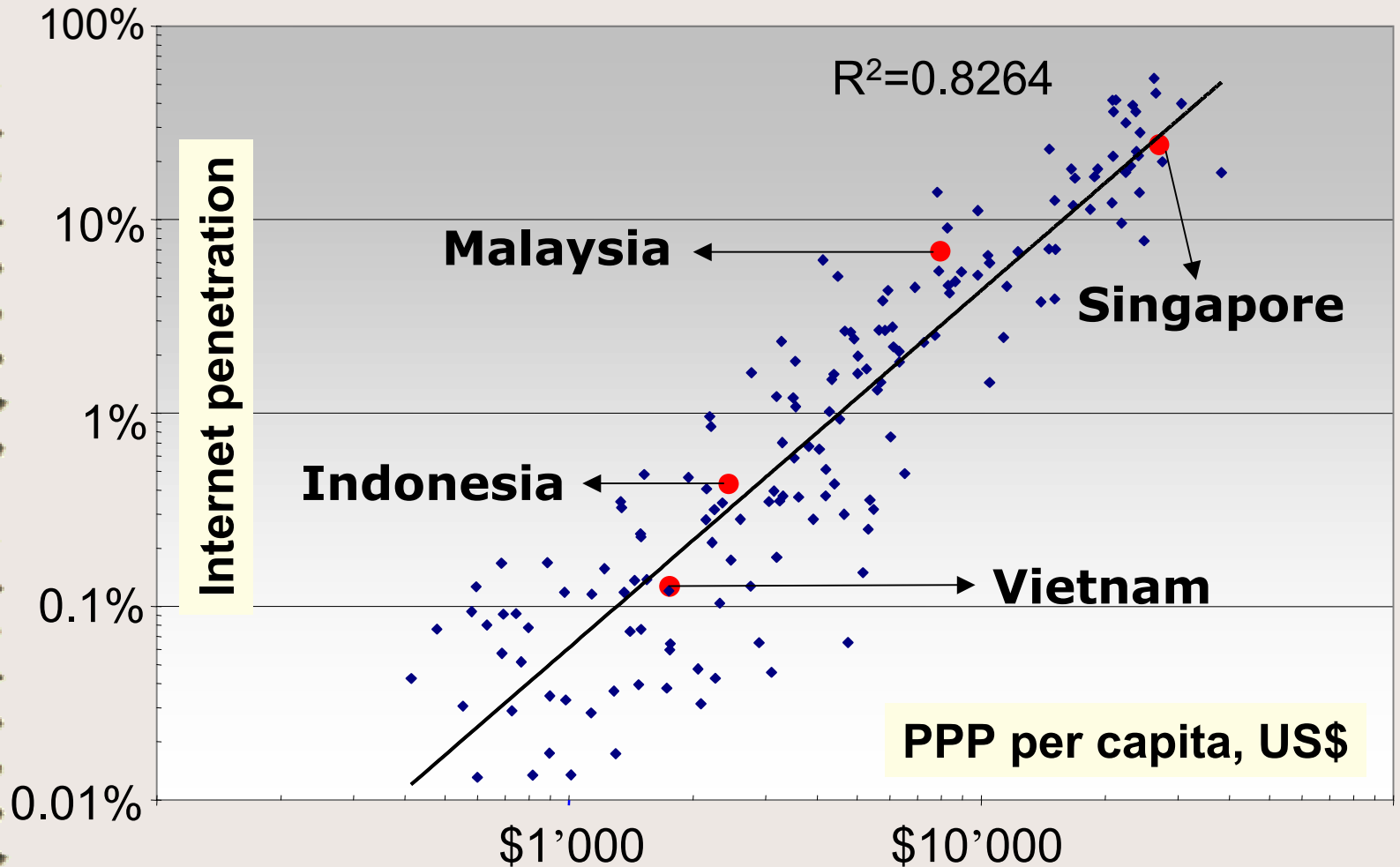
The e-city: Singapore

- First study completed
- Model for other countries
- Universal access: All telephone subscribers (almost all households) have 'free' Internet access (only pay telephone usage charge)
- One of most broadband countries on earth
- Sophisticated application development
- Converged regulator and high level support for ICT
- Good market information from regulator, national statistical agency and research firms





Wealth & Internet





Soft factors

Country	Adult literacy rate (%)	Secondary school enrolment (%)
Singapore	91.8	75.6
Malaysia	86.4	64.0
Vietnam	92.9	55.1
Indonesia	85.7	56.1

Source: UNDP-HDI, 2000 (1998 data).



Languages

Country	Official languages / main languages	Number of languages
Singapore	Chinese: 59% Malay: 14% Tamil: 3% English: 23% (71% literacy)	26
Malaysia	Malay: 66% Chinese: 25% Tamil: 7% English literacy: Peninsular Malaysia 54%, Sarawak 28%, Sabah 29%	54
Vietnam	Vietnamese: 87%	87
Indonesia	Indonesian: 85% (15% mother tongue) Javanese: 42% Sudanese: 14%	>250



Infrastructure comparisons



Internet comparisons

	Indonesia	Malaysia	Singapore	Vietnam
Number of ISPs	60	7		5
Internet penetration				
Broadband	Cable ADSL trial	ADSL trial	Cable & ADSL	ADSL trial
Int'l bandwidth per subscriber				

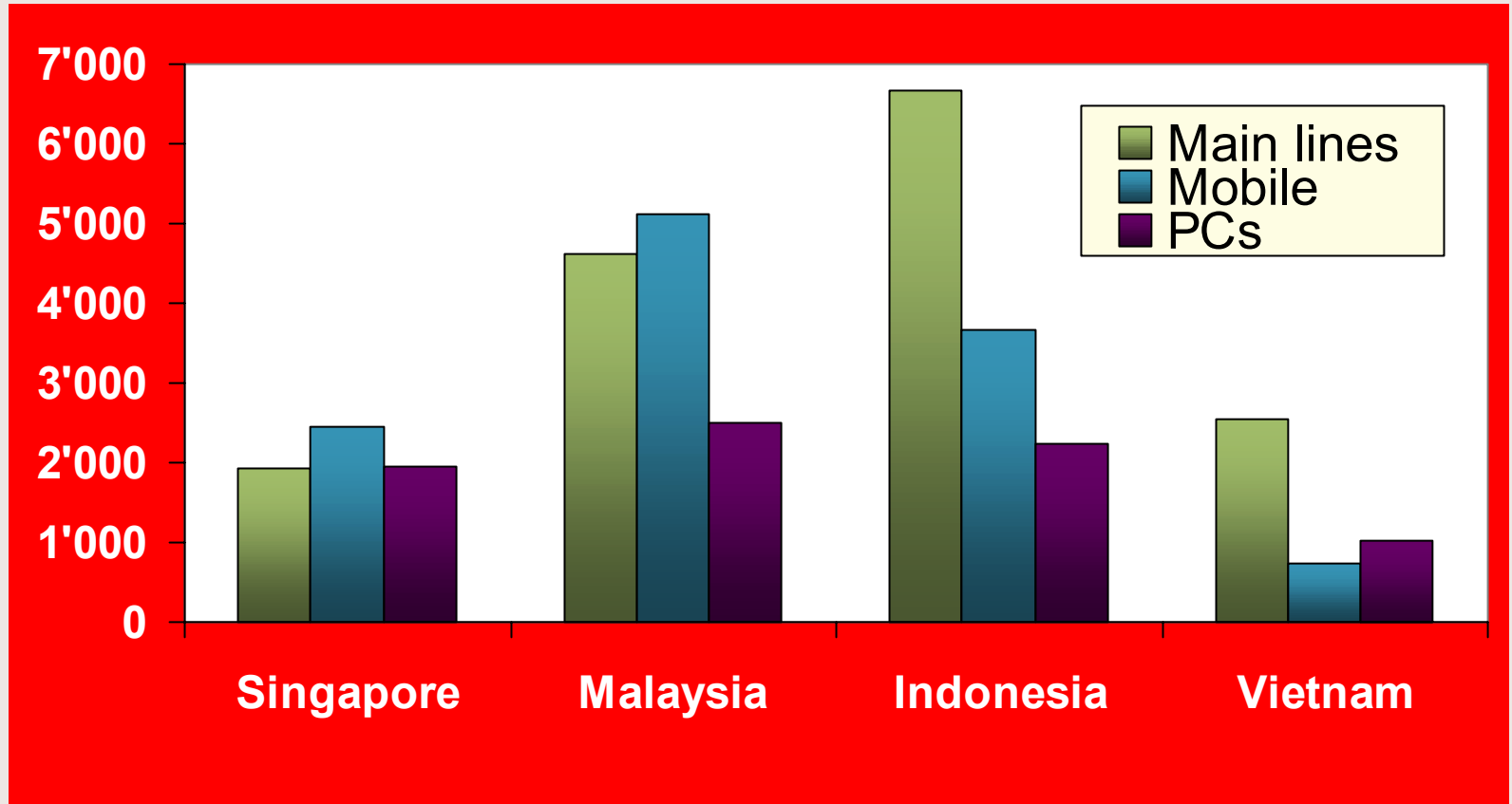


Regulatory comparisons

	Indonesia	Malaysia	Singapore	Vietnam
Content	No restrictions	No restrictions	100 symbolic sites blocked	Firewall
VoIP			Allowed with license	National trial
Market entry				



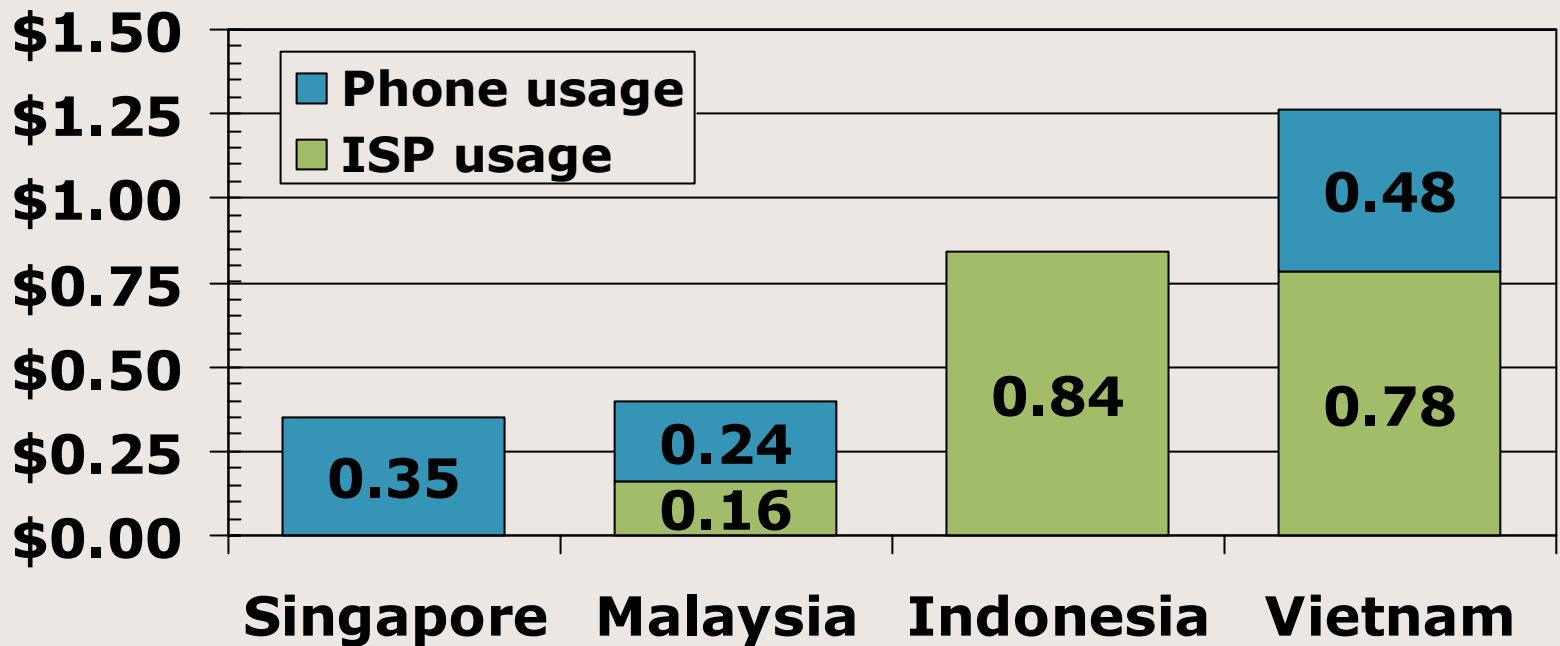
Mobile comparisons





Tariff comparisons

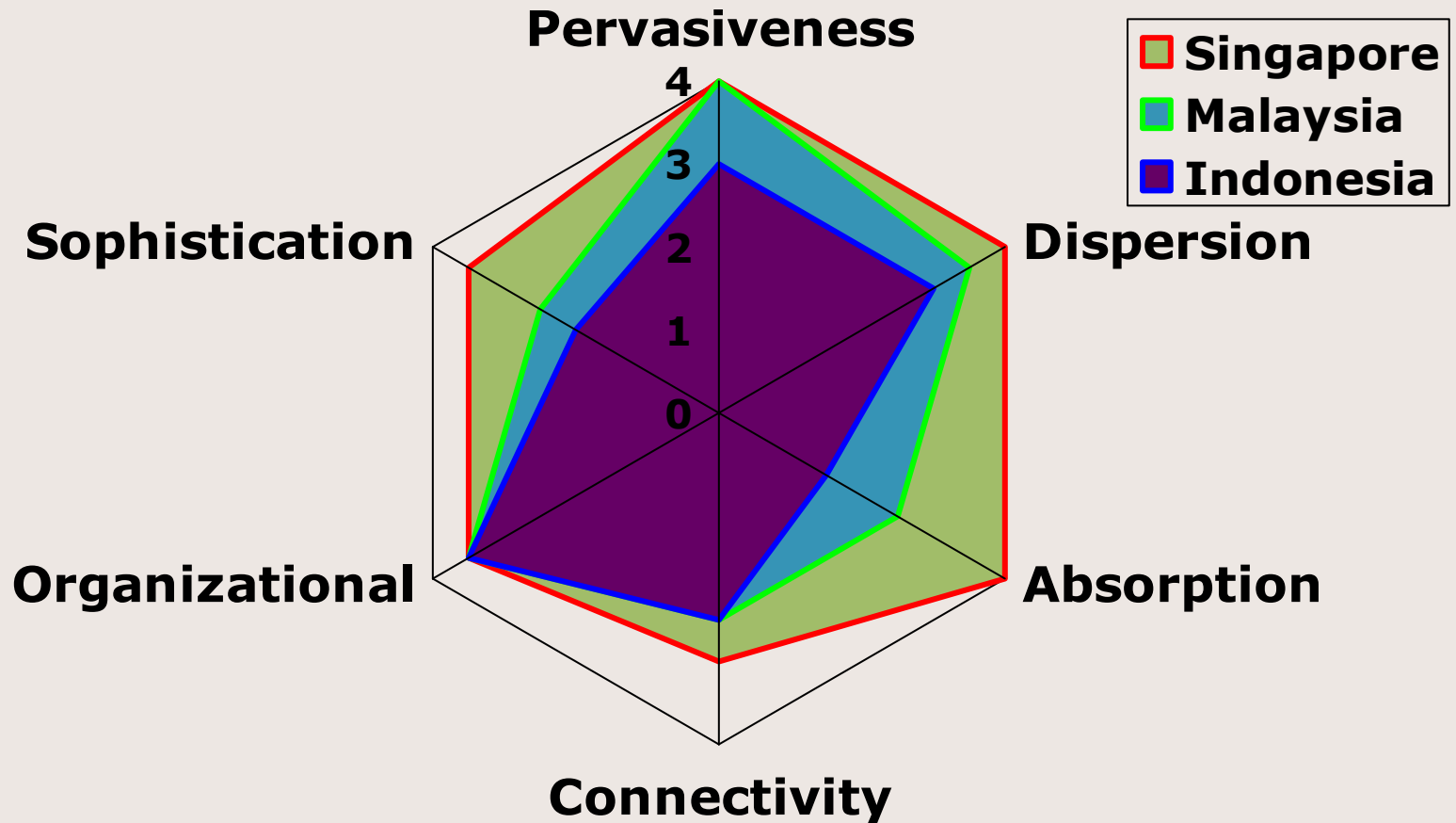
Dial-up Internet access per hour, US\$, July 2001



Source: ITU adapted from ISP data.



Framework comparison





Market research



	Indonesia	Malaysia	Singapore	Vietnam
Statistical agency	Statistics Indonesia	Department of Statistics	Statistics Singapore	General Statistical Office
Online?	www.bps.go.id	www.statistics.gov.my	www.singstat.gov.sg	Not yet
ICT Statistics?	No	Yes (2000 Census)	Yes	No
Telecom regulator	POSTEL	CMC	IDA	DGPT
Online?	www.postel.go.id	www.cmc.gov.my	www.ida.gov.sg	No
ICT statistics?	No	A few	Yes	No



Universal Access





Interesting things





Conclusions

- Digital divide is not an infrastructure problem but an affordability and awareness problem
- Universal access policies are, in general, non-existent, insufficient, and not clear
- Lack of market research
- Shortage of relevant content / applications is a major barrier to benefits of ICT for development
- Governments are not as committed as they should be; need to promote 'killer application'

The End

