



ASIA NOW: NAVIGATING THE ASEAN REGION

Telecommunications Equipment and Services

INDONESIA



Market Overview

- Forecasted growth rate of 30% for 2008
- Imports accounted for 90% of \$5 billion market in 2007
- U.S. share of import market estimated at 15% to 20%

Best Prospects

- Cellular Systems equipment
- Content for 3G
- GSM and CDMA network expansion
- Broadband internet infrastructure

PHILIPPINES



Market Overview

- Forecasted growth rate of 10% for 2008
- Imports accounted for an estimated \$1.3 billion in 2007
- U.S. share of import market estimated at 6.3% in 2007

Best Prospects

- Wireless Broadband
- Digital Broadcast Equipment
- Mobile Applications

THAILAND



Market Overview

- Forecasted growth rate of 2% in 2008
- Imports accounted for 60-70% of \$7.8 billion in telecom spending in 2007
- U.S. share of import market estimated at 11%

Best Prospects

- Broadband internet infrastructure
- Wireless communication network
- 2G network maintenance
- 3G network upgrade

MALAYSIA



Market Overview

- Forecasted growth rate of 10% for 2008
- Imports accounted for 32% of \$3.6 billion market in 2007
- U.S. share of import market estimated at 11%

Best Prospects

- WiFi/WiMAX
- VoIP
- FTTH and last mile connectivity
- Wireless access points

SINGAPORE



Market Overview

- Forecasted growth rate of 5% for 2008
- Imports accounted for 26% of \$3.4 billion market in 2007
- U.S. share of import market is estimated at 4%

Best Prospects

- Next generation Broadband network
- Wireless Broadband
- 3G solutions

VIETNAM



Market Overview




- Forecasted growth rate of 30% for 2008
- Imports accounted for 80% of \$5 billion market in 2007
- U.S. share of import market estimated at 5%

Best Prospects




- All telecom infrastructure equipment and services

Market Specifics

The ASEAN governments have agreed to implement Mutual Recognition Arrangements (MRA) on conformity assessment for telecommunication equipment, in the hope that harmonising standards for telecommunication equipment testing will lessen the time to market and lower business costs while creating a common market for ICT goods and services. Such an arrangement should make it easier for U.S. firms to implement a regional marketing strategy.

	Indonesia 	Malaysia 	Philippines 
Governing Body	Ministry of Communication and Information	Ministry of Energy, Water and Communications	Department of Transportation and Communications, DOTC
Regulatory Body	Indonesian Telecommunications Regulatory Body	Communications and Multimedia Commission	National Telecommunications Commission, NTC
Type Approval Body	Standard	SIRIM Bhd	National Telecommunications Commission, NTC
Type Approval Process Requirement	Yes	Yes	Yes
Technical Standard for Cellular	GSM, CDMA, 3G	GSM, 3G	GSM, 3G
Import Permit Requirement	From Indonesian importers	Yes	Yes
Market Research	Cellular Services (8/2007) Telecom and Broadcasting Market Brief (4/2007)	E-commerce (12/2007) WiFi Broadband (12/2007) Cyber Laws (12/2007) Telecom and Broadcasting (2/2007)	Telecom and Broadcast Industry Overview (1/2008)
Trade Shows	ICT 2008 May 27-29, 2008 Jakarta Convention Center	WCIT 2008 May 18-22, 2008, Kuala Lumpur	CommWorld 2008 Aug 2008, Manila
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Market Specifics

	Singapore 	Thailand 	Vietnam 
Governing Body	Infocomm Development Authority	Ministry of Information and Communication Technology	Ministry of Information and Communications (MIC)
Regulatory Body	Infocomm Development Authority	National Telecommunication Commission	Ministry of Information and Communications (MIC)
Type Approval Body	Infocomm Development Authority	National Telecommunication Commission	Ministry of Information and Communications (MIC)
Type Approval Process Requirement	Yes	Yes	Yes
Technical Standard for Cellular	GSM	GSM, CDMA	GSM, CDMA
Import Permit Requirement	Yes	Yes	Yes
Market Research	Telecommunication and Broadcast market brief (1/2008) Wireless Communication (5/2007)	Telecommunication and Broadcast industry in Thailand (10/2007)	Industry Overview on Vietnam's ICT (01/2008)
Trade Shows	CommunicAsia 2008 Jun 17-20, 2008	ITU Asia 2008 Sep 2-5, 2008	Vietnam Telecomp 2008 November 26-29, 2008, HCMC, Vietnam
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