Broadband Infrastructure in South Asia and West Asia

Markets, Infrastructure, and Policy Options for Enhancing Cross-Border Connectivity
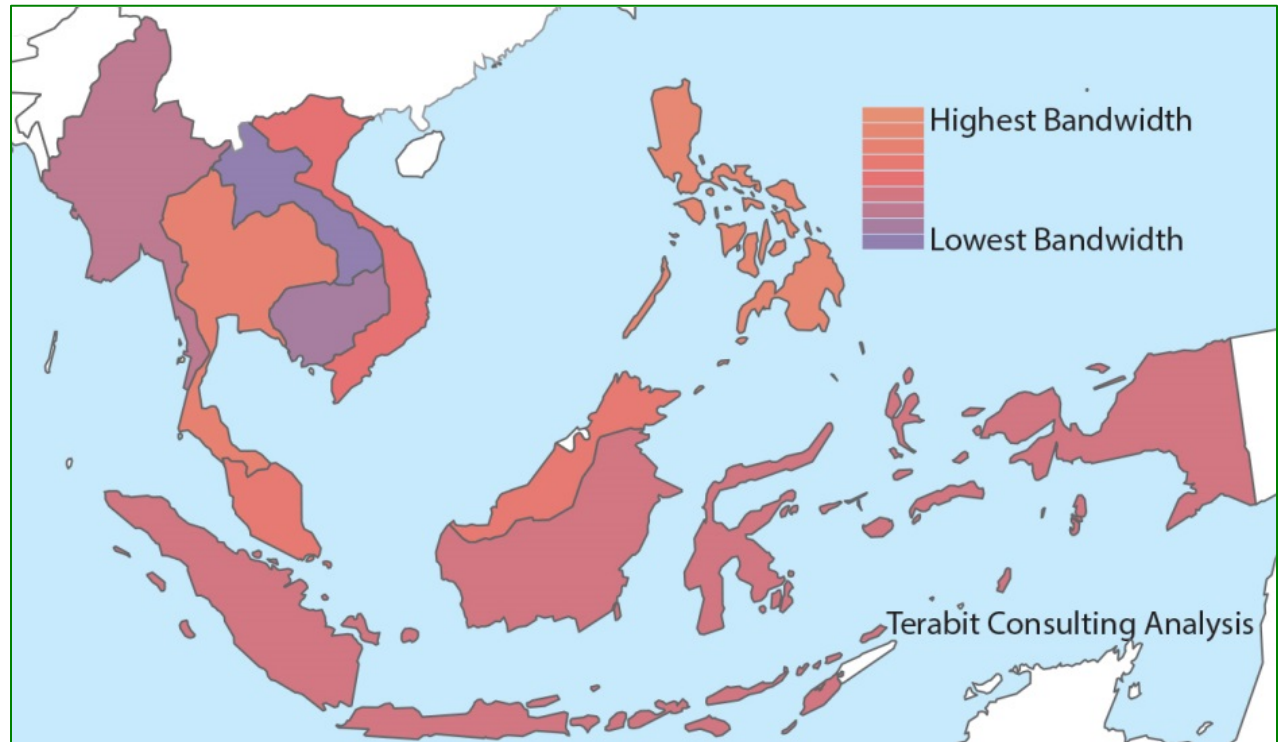
Michael Ruddy
Director of International Research
Terabit Consulting

TERABIT
Consulting

Part 1: Background and Methodology

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Completed ASEAN-9 Study

Phase I: Between November of 2012 and August of 2013, Terabit Consulting completed a study of 9 countries in Southeast Asia, as well as adjoining regions:
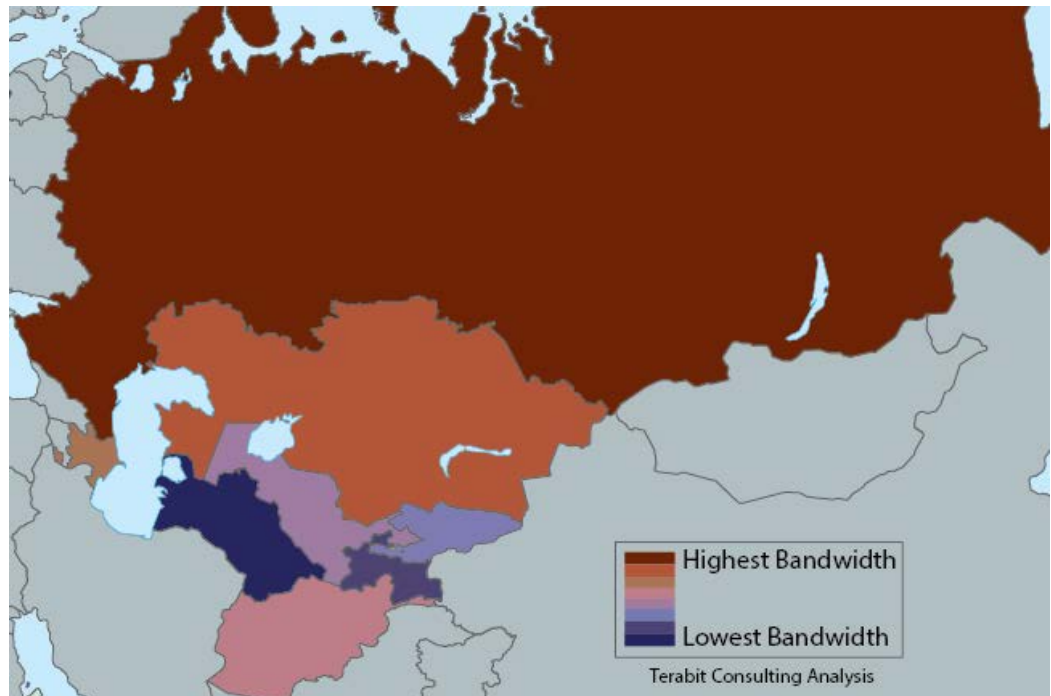
- Cambodia
- Indonesia
- Lao PDR
- Malaysia
- Myanmar
- Philippines
- Singapore
- Thailand
- Vietnam
- Yunnan Province, China

Highest Bandwidth

Lowest Bandwidth

Terabit Consulting Analysis

TERABIT Consulting

Completed North & Central Asia Study

Phase II: Between June and November 2013, Terabit Consulting completed a study of 7 countries in North and Central Asia
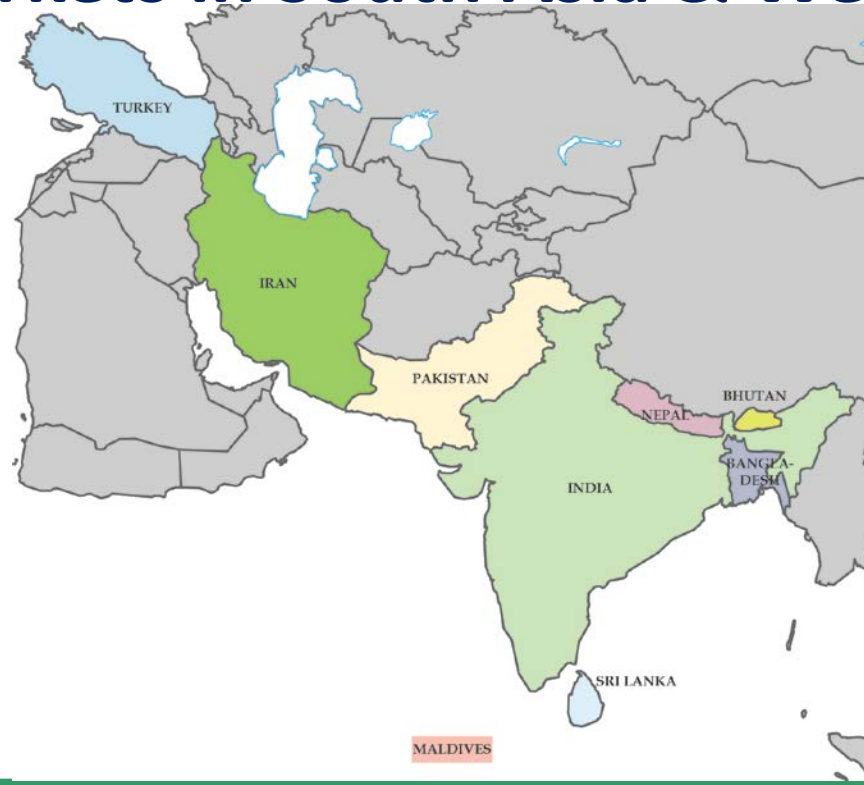
- – Azerbaijan
- – Kazakhstan
- – Kyrgyz Republic
- – Russian Fed.
- – Tajikistan
- – Turkmenistan
- – Uzbekistan

Highest Bandwidth

Lowest Bandwidth

Terabit Consulting Analysis

TERABIT Consulting

Current Study: South Asia and West Asia

Between April and October 2014 (with analysis ongoing), Terabit Consulting performed a **detailed analysis of broadband infrastructure and markets** in **9 strategic markets in South Asia & West Asia:**

- Bangladesh
- Bhutan
- Iran
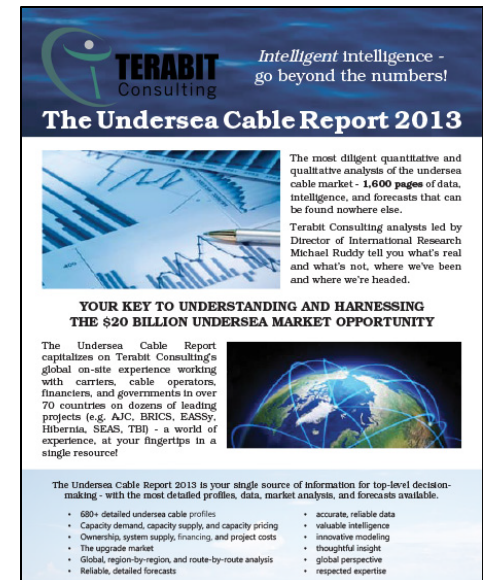- India
- Maldives
- Nepal
- Sri Lanka
- Turkey

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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**

TERABIT Consulting

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 South and West Asia Bandwidth and Broadband Markets