



ASEAN Regional Market Briefing: 2015 ICT Industry Updates from *Burma, Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam*

Join the U.S. Commercial Service – Silicon Valley on **Friday, April 17, 2015, in San Jose**, as we welcome Commercial Specialists from the U.S. Embassies in *Burma, Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam*, who will provide a briefing on ICT market opportunities spanning the entire ASEAN region.

The Asia-Pacific region is poised to become the world's largest information and communication technologies region, driven by the rapid proliferation of smart devices and the explosive growth of internet users. The arrival of the ASEAN Economic Community (AEC) in late 2015 is boosting ICT investment in the region. Enterprise mobility, big data and cloud computing are the top three investment priorities across ASEAN in 2015.



BURMA: The telecom industry in Burma is currently a green-field environment. Only an estimated 3% of the population used the internet and less than 10% were mobile phone users before 2014. However, mobile phone penetration is expected to increase to 50% during fiscal year 2014/2015, according to projections from the Myanmar Ministry of Communications and Information Technology. As internet and mobile use increases, there will be IT business opportunities in virtually every sector. The arrival of foreign investment and joint ventures, as well as the development of domestic industry, will drive demand for computer software in Burma. **Presenter: Mr. Win Myo - Ernest Than, Commercial Specialist, U.S. Embassy, Rangoon – Burma**



INDONESIA: Indonesia is the fourth largest cellular market in the world with around 278 million subscribers in 2014. The country is also the world's top ten 3G markets where broadband users skipping fixed connections and going straight to mobile. Even though 3G services market is already sizeable, the 2.5G mobile market is still remarkably widespread across the country. Prepaid subscriptions overwhelmingly reached as high as 98% of subscribers. The three largest cellular operators – Telkomsel, Indosat, and XL Axiata - accounted for 85% of the Indonesia's total number of cellular subscribers. **Presenter: Mr. Kalung Riang, Commercial Specialist, U.S. Embassy, Jakarta – Indonesia**



MALAYSIA: Malaysia is one of the fastest growing markets for the "Internet of Things" in ASEAN and APAC. With an estimated spending of US\$70 million in 2014, the IOT market is estimated to reach US\$447 million by 2017, growing from 2013 at a CAGR of 111.5%. IoT spending is defined as revenue from hardware, software and professional services that are directly attributable to IoT solutions and services. The Malaysian mobile market is growing with a mobile penetration rate of 140.7%. Mobile subscriptions were up 2.2% to 42.9 million subscribers in 2014, driven by data and value added services. In 2014, 68% of people in Malaysia were internet users – among which, 95% were Facebook users. Social media usage across platforms is high so service providers are increasingly looking at social media as an important tool in their overall promotion and marketing campaigns. That said, 4G adoption is currently under 3%, as service coverage is restricted to select locations. **Presenter: Ms. Umaranjine Arumugam, Commercial Specialist, U.S. Embassy, Kuala Lumpur – Malaysia**

ASEAN Regional Market Briefing

**Friday, April 17, 2015
8:30am-11:00am**
UL, 455 East Trimble Rd.
San Jose, CA, 95131

Fee: \$40.00

[Register here](#)

or visit

<https://emenuapps.ita.doc.gov/ePublic/event/editWebReg.do?S martCode=5Q6B>

Questions? Please call
408-535-2757

Hosted by:





PHILIPPINES: IT spending in the Philippines reached over US\$6 billion in 2014 and is estimated to grow by 10% in 2015 due to increased demand for mobility, software and services, networking systems and enterprise solutions. IT-enabled services have a 5% contribution to the country's GDP. The Philippine telecom industry has 110 million mobile subscribers. There are significant growth opportunities for wireless broadband based on continuous increase of smartphone ownership. Other best prospects are fiber optics and LTE to help improve Internet connection speed. **Presenter: Mrs. Yna Quiambao, Commercial Specialist, U.S. Embassy, Manila – Philippines**



SINGAPORE: Singapore's highly knowledge-intensive economy has made it a top choice of many global ICT companies establishing a foothold in Asia. It has an ultra-high speed, pervasive, intelligent and trusted ICT infrastructure and is building the world's first Smart Nation. Gartner estimates that enterprise spending on IT products and services in Singapore will be US\$19.1 billion in 2015. Compared with other mature markets in the Asia Pacific region, this intensity of IT spending is high relative to Singapore's gross national output and population. The best opportunities in 2015 will be communications, media and services, banking and securities, government and manufacturing. **Presenter: Ms. Sweehoon Chia, Senior Commercial Specialist, U.S. Embassy – Singapore**



THAILAND: Thailand has become one of the fastest developing countries in the region in the field of ICT, with an expected market value of \$ 27 billion this year up from \$ 23.9 billion from the previous year and accounting for 5% of the country's GDP. With the full support from the military-led government under the National Digital Economy Master Plan together with the preparation for AEC by the end of this year, strong ICT spending in Thailand is expected to continue, particularly among state agencies and the telecommunications, financial and insurance sectors. **Presenter: Mrs. Oraphan Boonyalug, Commercial Specialist, U.S. Embassy, Bangkok - Thailand**



VIETNAM: The IT hardware and software markets of Vietnam, which are driven by continued higher IT demand and outlay from the public sector, private sector and households, have grown at an average rate of 15% for the last five years. To meet its dynamic market growth, Vietnam has been importing the lion's share of IT hardware and software as Vietnamese manufacturers are still relatively new and may not be able to offer the same range of solutions and services as foreign suppliers. U.S. IT suppliers are provided great opportunities for success in penetrating or expanding their business in Vietnam thanks to their reputation for high-quality products, state-of-the-art technology and professionalism. **Presenters: Mrs. Tran Vu Phuong Lan, Commercial Assistant, U.S. Embassy, Hanoi - Vietnam; Mr. Triet Huynh, Commercial Specialist, U.S. Consulate General, Ho Chi Minh City – Vietnam**

The U.S. Commercial Service is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration. U.S. Commercial Service trade professionals in over 100 U.S. cities and in more than 75 countries help U.S. companies get started in exporting or increase sales to new global markets.



A limited number of formal consultations are available during the afternoon of Friday, April 17. To request an appointment, please email your request to karl.kailing@trade.gov at the Silicon Valley U.S. Export Assistance Center. Please include the following information:

1. Short description of your company's ICT product/service, together with any available marketing collateral;
2. Brief description of your company's current activities in the ASEAN region --- please be as specific as possible;
3. Outstanding issues, problems or concerns, in the specific ASEAN country(ies) -- please provide as much detail as possible.