

Indonesia Telecommunication Industry Report - H1, 2013

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Abstracts

The telecommunication industry has played an important role in the development of Indonesia's economy over the last few years. Not only has it increased connectivity across the country, it has also helped in stimulating other sectors of the economy like banking, finance, software, hospitality and trade. The telecommunication sector in Indonesia comprises several segments, namely mobile cellular services, fixed line services, internet and broadband services, mobile valued added services and telecom infrastructure services. As of 2011, Indonesia was the world's fifth largest telecommunication market in terms of mobile cellular subscribers after China, India, USA and Russia. It is also one of the fastest growing markets in the world.

The industry continued on its growth trend in FY12, riding on the wave of increasing data traffic and growing internet penetration. The country's young population is driving the multimedia, broadband and internet services of the network operators. The immense popularity of social networks is evident by the fact that Indonesia was the fourth largest market for Facebook as of March 2013. Meanwhile, data traffic reported by major service providers has increased exponentially in the last four years. Data, internet and broadband services accounted for a substantial portion of operators' revenue in the year. This has helped the operators in offsetting the decline being experienced in voice revenues.

Indonesia's young population and rising per capita income, coupled with the improvement in telecommunication infrastructure and coverage bodes well for the sector.

Key Points:

In FY12, mobile cellular subscriber base in Indonesia grew by 11% year on year. The big three mobile service players, namely Telkomsel, Indosat and Axiata, accounted for 83% of total cellular subscribers. Telkomsel led with 45% share. Telkomsel's subscriber base recorded a year on year growth of 17% while Indosat recorded a year on year growth of 13.2%. XL Axiata, meanwhile, lost 1.3% of its cellular subscriber base.

In FY12, fixed wireline subscriber grew by 3% year on year while fixed wireless subscriber base shrank by 2% year on year.

The number of mobile broadband subscriptions touched 24million at the end of FY12.

The mobile cellular penetration rate in Indonesia grew at a CAGR of around 30% during 2006-2011. It touched 117% at the end of FY12.

Contents

1. INDUSTRY PROFILE

- 1.1 Sector overview
- 1.2 Sector size
- 1.3 Competitive landscape
- 1.4 Environmental scanning

2. MARKET TRENDS AND OUTLOOK

- 2.1 Key economic indicators-Indonesia
- 2.2 Mobile cellular segment
- 2.3 Fixed wireline segment
- 2.4 Fixed wireless segment
- 2.5 Internet & broadband segment
- 2.6 Industry forecast

3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading Players
 - 3.1.1 PT Telekomunikasi (Persero) Indonesia Tbk (Telkom Indonesia)
 - 3.1.2 PT Indosat Tbk
 - 3.1.3 PT XL Axiata Tbk
- 3.2 Comparative matrix
- 3.3 SWOT analysis

4. TABLES AND CHARTS

- Table 1: Status of different telecommunication services segments in Indonesia
- Table 2: World mobile cellular subscription statistics
- Table 3: Emerging markets (Asian countries)–Mobile cellular statistics
- Table 4: Foreign players in Indonesian telecom industry
- Table 5: Coverage of major Indonesian mobile service players
- Table 6: Segment wise revenue growth-Telkom Indonesia
- Table 7: Balance sheet parameters
- Table 8: Valuation matrix
- Chart 1: Mobile cellular penetration rate
- Chart 2: Contribution of various sectors to Indonesian GDP

- Chart 3: Gross domestic product from Indonesian communication sector
- Chart 4: Position of People's Representative Council after 2009 elections
- Chart 5: GNI per capita, PPP-Indonesia
- Chart 6: Quarterly GDP growth rate-Indonesia
- Chart 7: Average Monthly USD to IDR Exchange Rate
- Chart 8: Fiscal deficit-Indonesia
- Chart 9: Inflation during FY12-Indonesia
- Chart 10: Bank of Indonesia-Monetary policy rate
- Chart 11: Q/Q change in percentage- GDP by sector
- Chart 12: Number of mobile cellular subscribers-Indonesia
- Chart 13: Household penetration rate of mobile cellular services
- Chart 14: Share of mobile service providers in Indonesia by number of subscribers
- Chart 15: Subscriber base of big three mobile service players
- Chart 16: Number of cellular subscribers by region
- Chart 17: Minutes of usage per subscriber per month
- Chart 18: Average revenue per user per month in IDR
- Chart 19: Number of fixed wireline subscribers-Indonesia
- Chart 20: Household penetration rate of fixed wireline services
- Chart 21: Share of fixed wireline in Indonesia by number of subscribers
- Chart 22: Number of fixed wireline subscribers by region
- Chart 23: Number of fixed wireless subscribers-Indonesia
- Chart 24: Share of fixed wireless service in Indonesia by number of subscribers
- Chart 25: Penetration of internet in Indonesia
- Chart 26: Household penetration rate of mobile cellular services
- Chart 27: Number of fixed broadband subscribers-Indonesia
- Chart 28: Number of 3G base transceiver station
- Chart 29: Forecast for internet penetration rate in Indonesia
- Chart 30: Forecast for the number of fixed broadband subscriptions
- Chart 31: Revenue share by different segments of Telkom Indonesia
- Chart 32: Breakup of profits by segment
- Chart 33: Profit margins of Telkom Indonesia
- Chart 34: Indosat-Shareholding
- Chart 35: Revenue share by different segments of Indosat
- Chart 36: Net sales of Indosat
- Chart 37: Profit margins of Indosat
- Chart 38: XL-Shareholding
- Chart 39: Revenue share by different segments of XL
- Chart 40: Data traffic of XL
- Chart 41: Profit margins of XL

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