

# Singapore Information and Communications Technology Industry Report - H2, 2013

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## Abstracts

This report profiles Singapore's information and communications technology (ICT) industry and discusses market trends through H2 2013. It also analyzes the sector's outlook through 2014 and beyond, and summarizes the leading players in the industry, including SingTel, StarHub, and M1 Limited.

The Singapore ICT or infocomm industry has witnessed a period of high growth during the last decade. Among the major Southeast Asian countries, Singapore had the highest penetration rate of mobile cellular subscriptions. The Singapore government has played a proactive role in promoting the country's ICT industry, seeing it as a main growth driver of the economy. The government's vision (iN2015) is to transform Singapore into an intelligent, infocomm-powered nation by 2015. As part of the iN2015 Master plan, Singapore is looking into the deployment of seamless, trusted, and intelligent infrastructure that can support and enhance the infocomm industry. Next Gen NII is part of this initiative. It comprises a nationwide ultra-high-speed fiber access infrastructure called the Next Gen Nationwide Broadband Network (Next Gen NBN) accompanied by a countrywide wireless network.

The industry is comprised of five major segments, namely hardware, software, telecommunication services, information technology services, and content services. Hardware was the dominant segment, accounting for more than half of the total revenues as of 2012. Singapore is suited for hardware production because of its high-quality manufacturing systems backed by an established ecosystem of component manufacturers, EMS companies, and logistics service providers. Singapore is also home to more than 80 of the top 100 software and services companies. Many companies, including the top 15 software firms, have regional or Asia-Pacific headquarters in the country. IT services, comprised of network and data management

services, form the backbone of the Singaporean ICT industry. The telecommunication service providers have played an active part in the implementation of the government's iN2015 Master plan. The advent of smartphones has brought a spurt in data-related revenues to telecommunication firms. On the other hand, fixed-line services are slowly but gradually losing their subscriber base in the country.

The future of the infocomm industry in Singapore will be driven by ICT hardware exports and data usage of subscribers. Data traffic is growing at an exponential rate due to the rising popularity and use of data services. The advent of smartphones and tablets is further fuelling the rise in this traffic. Hence, for the next few years, the ICT sector's growth and development in Singapore will revolve around data management, the Internet of things, and mobile platforms.

**Key Points:**

This report includes financial and subscriber information for important market players such as Singapore Telecommunications Limited (SingTel), StarHub Limited (StarHub), and M1 Limited (M1).

Hardware was the dominant segment, accounting for around 66% of total revenues in 2012. It was also the fastest-growing segment, recording 30% y/y growth.

The annual revenue of the ICT software segment grew at a CAGR of 7% over the last 10 years. Software exports accounted for around 12% of the country's total ICT exports and saw a y/y growth of 0.3% in 2012.

The annual revenue of the telecommunication services segment grew at a CAGR of 4% over the last 10 years. Telecom segment exports accounted for 1.6% of the country's total ICT exports.

The information and communications sector contributed 4% to the country's GDP as of Q3FY13. It was the seventh-fastest growing sector of the economy in the quarter, recording a y/y growth of 5%.

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