

Singapore Information and Communications Technology Industry Report - H2, 2013

<https://marketpublishers.com/r/SCDFCB88F04EN.html>

Date: November 2013

Pages: 32

Price: US\$ 475.00 (Single User License)

ID: SCDFCB88F04EN

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%.

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-Singapore
- 2.2 Hardware segment
- 2.3 Software segment
- 2.4 Telecommunication services segment
 - 2.4.1 Mobile cellular services
 - 2.4.2 Fixed line services
 - 2.4.3 Internet and broadband services
- 2.5 IT services segment
- 2.6 Content services segment
- 2.7 Sector outlook

3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading players
 - 3.1.1 Singapore Telecommunications Limited (SingTel)
 - 3.1.2 StarHub Limited (StarHub)
 - 3.1.3 M1 Limited (M1)
- 3.2 Comparative matrix
- 3.3 SWOT analysis

4. TABLES & CHARTS

- Table 1: World mobile cellular subscription statistics
- Table 2: Key ratios of the leading players
- Chart 1: Mobile cellular penetration rate across major Southeast Asian countries
- Chart 2: Size of Infocomm industry of Singapore
- Chart 3: Breakup of infocomm industry of Singapore by segment revenue share
- Chart 4: Size of the domestic market of Infocomm industry of Singapore

- Chart 5: Size of the export market of Infocomm industry of Singapore
- Chart 6: Constituent parties in parliament
- Chart 7: Cost of business start-up procedures in 2012
- Chart 8: Percentage change over previous year- GDP by Sector
- Chart 9: Quarterly exports from Singapore
- Chart 10: Current account balance of Singapore
- Chart 11: Annual fiscal balance of Singapore
- Chart 12: Average monthly USD to SGD exchange rate
- Chart 13: Inflation during FY13-Singapore
- Chart 14: GDP by sectors at factor prices
- Chart 15: Percentage change over previous year- GDP by Sector
- Chart 16: Annual revenues earned by the hardware segment
- Chart 17: Breakup of ICT export revenue of Singapore by segments
- Chart 18: Annual revenues earned by the software segment
- Chart 19: Employed infocomm manpower in Singapore
- Chart 20: Annual revenues earned by the telecom services segment
- Chart 21: Mobile cellular penetration rate in Singapore
- Chart 22: Mobile data usage in Singapore
- Chart 23: Breakup of mobile subscriptions in Singapore by technology
- Chart 24: Fixed line penetration rates
- Chart 25: Breakup of fixed line subscriptions in Singapore by user type
- Chart 26: Method of internet access by proportion of subscriptions
- Chart 27: Broadband subscriptions in Singapore
- Chart 28: Annual revenues earned by the IT services segment
- Chart 29: Breakup of ICT domestic revenues by segments
- Chart 30: Annual revenues earned by the content services segment
- Chart 31: Subscriber base of SingTel in Singapore-Triple bundled plan
- Chart 32: Operating revenues of SingTel
- Chart 33: Consolidated profit margins of SingTel
- Chart 34: Mobile subscriber base of StarHub
- Chart 35: Operating revenues of StarHub
- Chart 36: Consolidated profit margins of StarHub
- Chart 37: Mobile subscriber base of M1
- Chart 38: Operating revenues of M1
- Chart 39: Consolidated profit margins of M1

I would like to order

Product name: Singapore Information and Communications Technology Industry Report - H2, 2013

Product link: <https://marketpublishers.com/r/SCDFCB88F04EN.html>

Price: US\$ 475.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/SCDFCB88F04EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970