

Overview of Southeast Asia's Telecom Infrastructure

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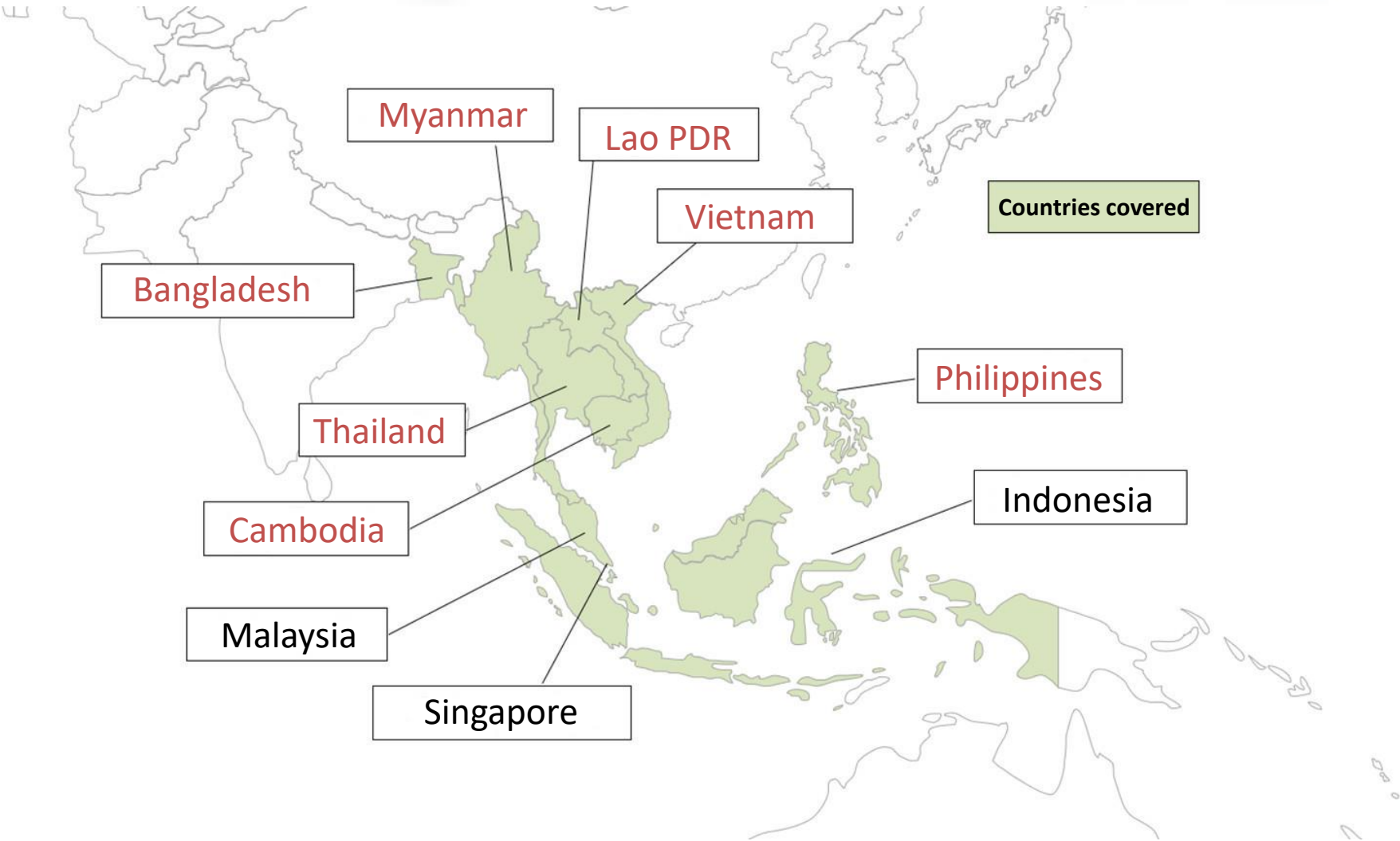


Agenda

This is an overview of a survey conducted by a Japanese research company between October 2024 and March 2025, focusing on the utilization environment of meteorological data in Southeast Asia.

1. Internet penetration in Southeast Asia
2. Available services of service providers in each country
Cambodia, Lao PDR, Myanmar, Philippines
Thailand, Vietnam, Bangladesh

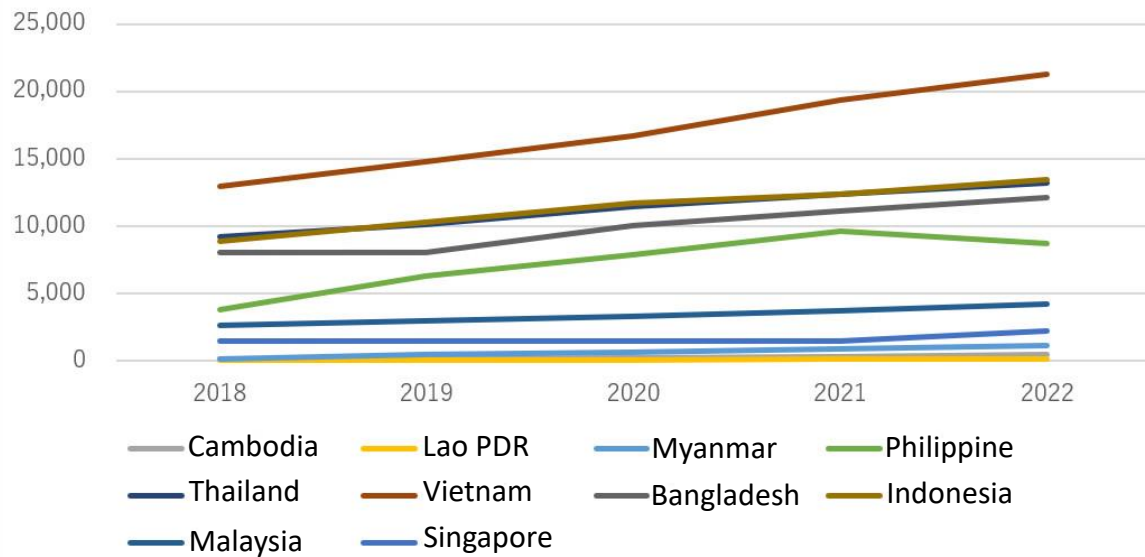
Countries covered by the survey



Internet penetration in Southeast Asia

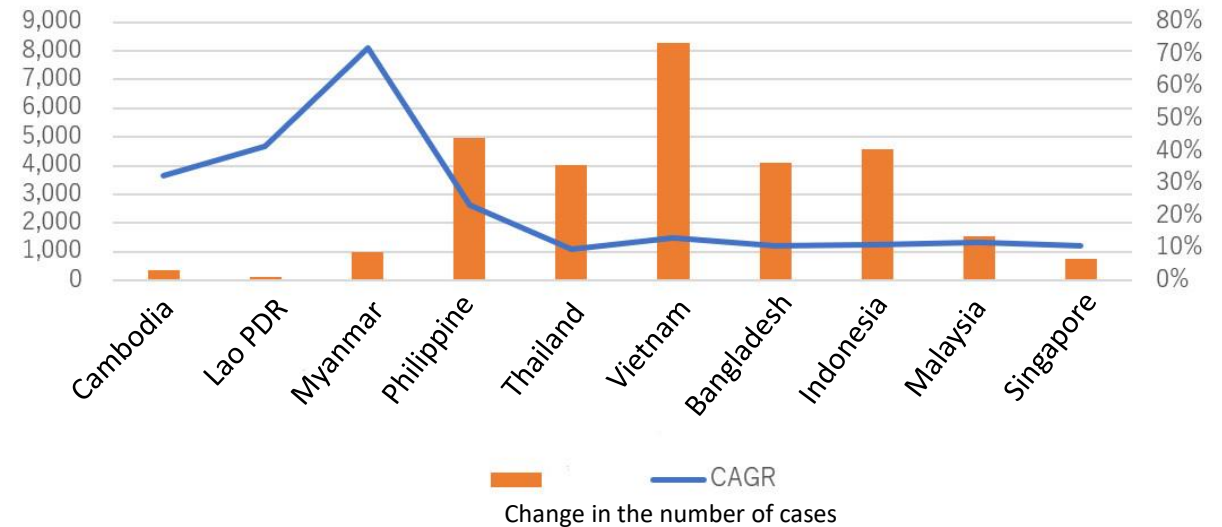
Internet Infrastructure penetration

Fixed broadband subscription trends



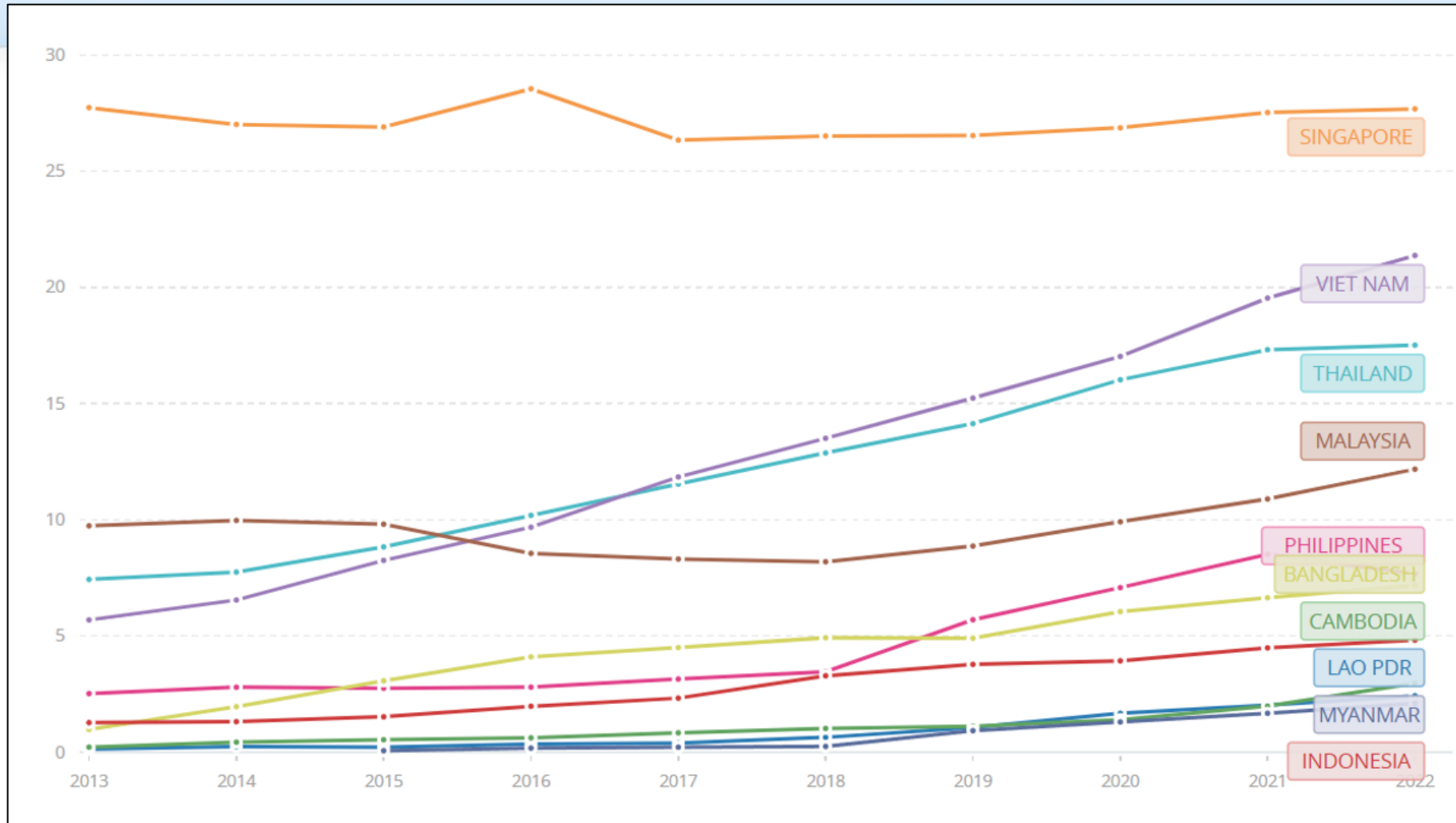
2018-2022 (Unit: in thousands)

Growth rate of fixed broadband subscriptions



2018-2022
Change in the number of cases (Unit: in thousands)
Compound Annual Growth Rate (Unit: %)

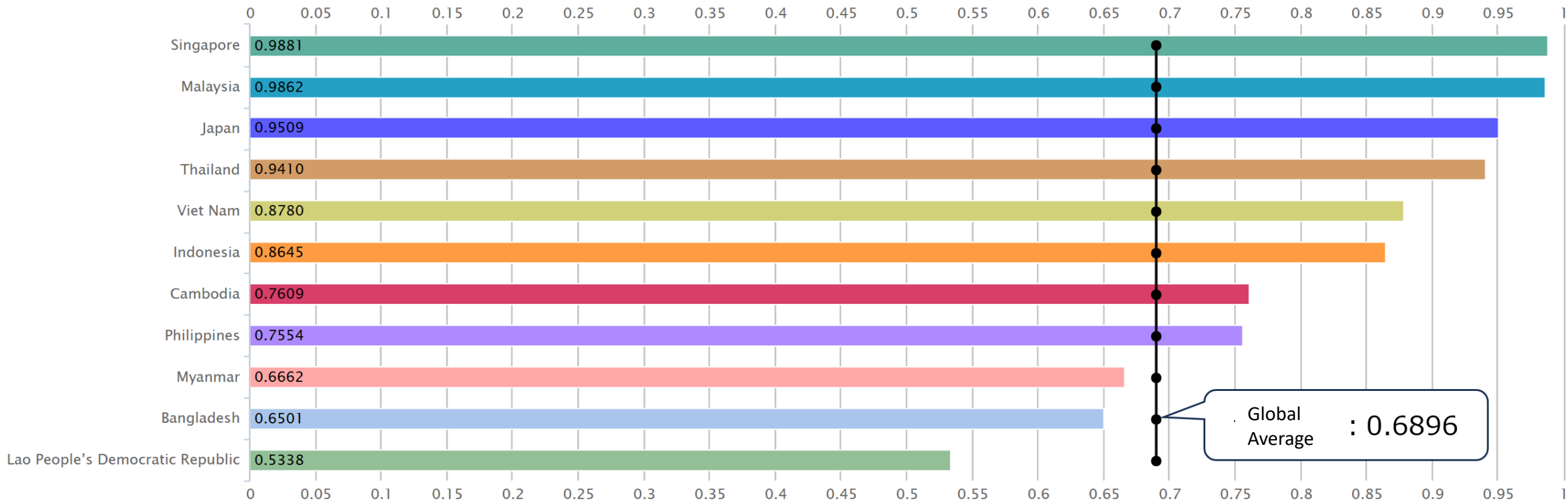
Internet penetration in Southeast Asia



Fixed broadband penetration rate: Fixed broadband subscriptions per 100 inhabitants (2013-2022)

Internet penetration in Southeast Asia

Infrastructure Index (TII), UN E-Government Survey 2024 Telecommunication



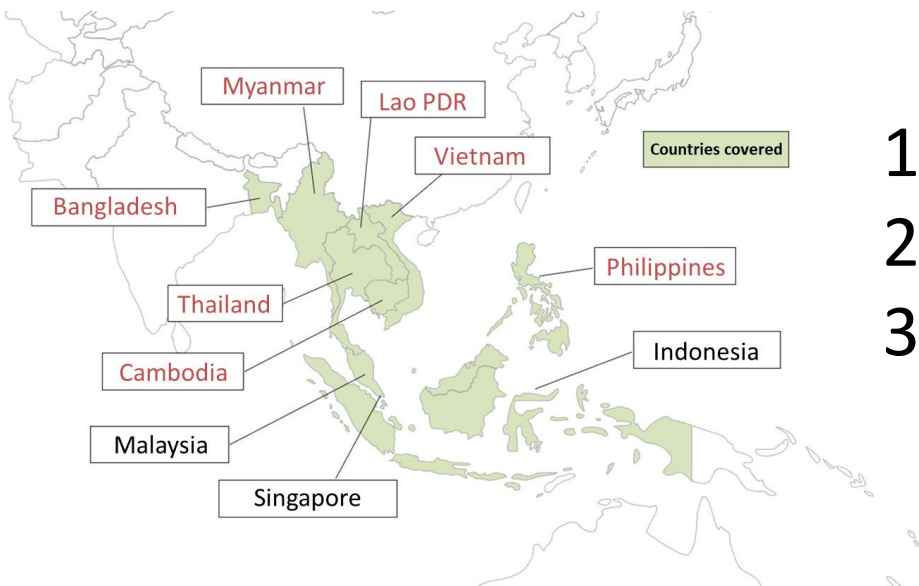
TII: Index based on the average of following four sub-indicators;

1. Internet users per 100 inhabitants, 2. Mobile users per 100 inhabitants
3. Active mobile broadband user count, 4. Cost level of telecom services



Available services of service providers in each country

A brief summary of service conditions by country, based on the following items.



1. Major Internet Service Provider (ISP)
2. Fixed monthly broadband fee (for reference)
3. Status of services

**Cambodia, Lao PDR, Myanmar, Philippines
Thailand, Vietnam, Bangladesh**

Cambodia

1. Major Internet Service Provider (ISP)
Viettel (Cambodia), Telecom Cambodia (government –affiliated), Ezecom
2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
Viettel (Cambodia)	150Mbps	55	Supports Static IP
	400Mbps	165	Supports Static IP
Telecom Cambodia	90Mbps	96	Unknown
Ezecom	100Mbps	119	Supports Static IP
	300Mbps	299	Supports Static IP

Cambodia

3. Status of services

- There were no identified providers delivering security management services
- The cloud market is expanding, with increasing competition driven by the entry of diverse providers
- **Alibaba Cloud** launched its services in April 2022.
- In March 2022, **Ezecom** partnered with **Amazon Web Services** (AWS) to provide cloud services.
- International service provider **Renova Cloud** has also established a presence in Cambodia, further accelerating cloud adoption among local businesses.

Lao PDR

1. Major Internet Service Provider (ISP)
Lao Telecom (government –affiliated), Unitel (Laos), ETL
2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
Lao Telecom	120Mbps	35	Unknown
	480Mbps	250	Unknown
Unitel (Laos)	10Mbps	18	Unknown
	1Gbps	1800	Unknown
ETL	10Mbps	18	Unknown
	100Mbps	180	Unknown

Lao PDR

3. Status of services

- There were no identified providers delivering security management services
- While ongoing improvements in telecommunications infrastructure are expected to contribute to the growth of the cloud market, it remains in a developing stage, and detailed information on specific service providers is still limited.

Myanmar

1. Major Internet Service Provider (ISP)

MPT (government –affiliated), ATOM, Ooredoo Myanmar, Mytel

2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
MPT	15Mbps	15	Unknown
	110Mbps	65	Unknown
ATOM	75Mbps	38	Unknown
	100Mbps	48	Unknown
Ooredoo Myanmar	20Mbps	15	Unknown
	100Mbps	52	Unknown

Myanmar

3. Status of services

- There was no mention of security management services provided by ISP operators.
- Among ISP operators, only **MPT** was found to offer cloud services.
- Security management services are provided by **Ritz, VSS Myanmar, KDDI Myanmar**, and others.
- Major cloud service offerings include **MPT's B2B Cloud, Zeus Cloud, mCloud, and Huawei Cloud**.
- Over the past five years, internet disconnections due to timeouts have occurred, indicating a high risk during network disruptions.

Philippines

1. Major Internet Service Provider (ISP)

PLDT (government –affiliated), Globe Telecom, Converge ICT

2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
PLDT	100Mbps	40	Supports Static IP
Globe Telecom	200Mbps	55	Supports Static IP
	1Gbps	155	Supports Static IP
Converge ICT	Pricing not disclosed	Pricing not disclosed	

Philippines

3. Status of services

- Each ISP provides security management services.
- In addition to ISPs, a wide range of domestic cloud service providers are also active in the market.

Thailand

1. Major Internet Service Provider (ISP)
True, AIS, 3 BB, NT (government –affiliated)
2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
True	500Mbps	83	Supports Static IP
	1Gbps	96	Supports Static IP
3 BB	500Mbps	37	Supports Static IP
	1Gbps	50	Supports Static IP
NT	Pricing not disclosed	Pricing not disclosed	

Thailand

3. Status of services

- All ISP package plans include security management services.
- No specific service details were provided for the cloud offerings of ISPs.

Vietnam

1. Major Internet Service Provider (ISP)

VNPT (government –affiliated), Viettel (government –affiliated), FPT

2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
VNPT	300Mbps	8	Dynamic IP
	600Mbps	460	Supports Static IP
Viettel	200Mbps	30	Supports Static IP
	1Gbps	1140	Supports Static IP
FPT	250Mbps	20	Unknown
	800Mbps	38	Unknown

Vietnam

3. Status of services

- Leading domestic ISPs in Vietnam, such as **VNPT** and **Viettel**, along with global players like **Microsoft**, **IBM**, and **Trend Micro**, offer a wide range of cybersecurity services.
- Major domestic ISPs in Vietnam, including **VNPT**, **Viettel**, and **FPT**, also offer their own cloud services.

Bangladesh

1. Major Internet Service Provider (ISP)
BTCL (government –affiliated), Link3 Technologies Ltd., BDCOM Online Ltd., ICC
2. Fixed monthly broadband fee (for reference)

ISP	Network Speed	Monthly Cost (US \$)	Static IP
BTCL	100Mbps	180	Unknown
	1Gbps	1720	Unknown
Link3 Technologies Ltd.	5Mbps	4	Unknown
	200bps	36	Unknown
BDCOM Online Ltd.	7Mbps	4	Unknown
	100Mbps	28	Unknown

Bangladesh

3. Status of services

- Security management services are provided by organizations such as **BGD e-GOV CIRT**, **Dhaka Distributions**, and **Cyber Bangla**.
- Notable cloud service providers include **BDCCL** (government-affiliated) and **Gennext Technologies Limited**. Both companies include security management services as part of their package offerings.
- In July 2024, the government implemented a nationwide shutdown of internet and telephone services to suppress the demonstrations; however, these measures were temporary.
- Given the potential for future network outages, redundancy should be implemented to enhance resilience.



Thank you — looking forward to your insights.