



东南亚市场蕴涵的机遇与挑战

Opportunities & Challenges Faced by Chinese Enterprises in Southeast Asia

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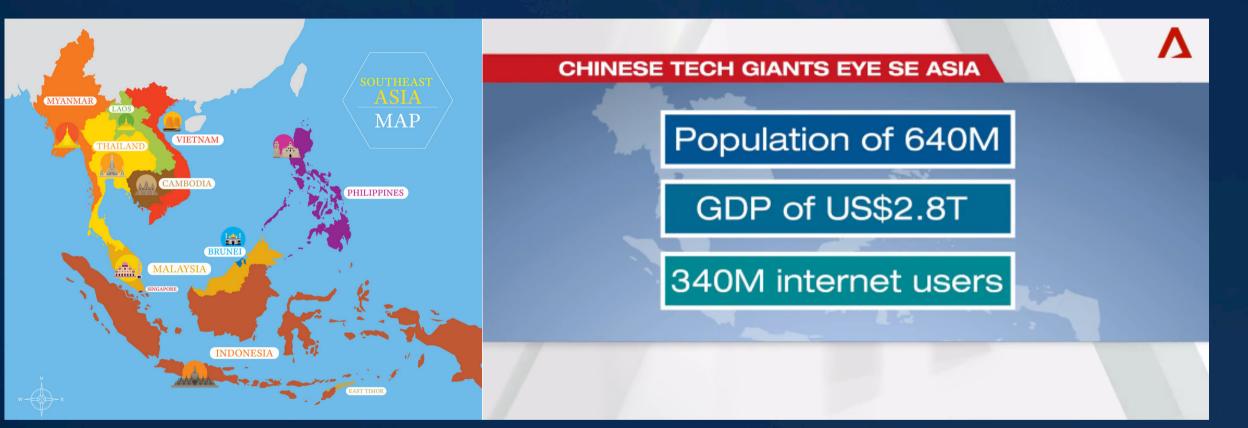


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东南亚的魅力

中国科技巨头对东南亚的展望

总人口 6.4亿



生产总值

2.8万亿美元

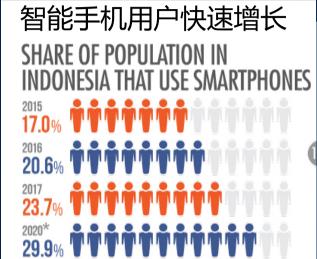
互联网用户

3.4_{(Z}

https://www.channelnewsasia.com/news/business/chinese-tech-giants-battle-alibaba-tencent-southeast-asia-10702424

了解印尼大数据的机遇









INDONESIA

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND MOBILE. INTERNET, AND SOCIAL MEDIA USE





URBANISATION: 56%

MOBILE SUBSCRIPTIONS



vs. POPULATION:

INTERNET USERS



PENETRATION: PENETRATION: 56% 56%

ACTIVE SOCIAL

MEDIA USERS

48%

2019







PENETRATION:

OVERVIEW: POPULATION & ECONOMY ESSENTIAL DEMOGRAPHIC AND ECONOMIC INDICATORS

女性人口



TOTAL

268.2

GDP PER CAPITA (PPP) (CURRENT INTERNATIONAL \$)



\$12,284 56%



49.7%

OVERALL LITERACY (ADULTS AGED 15+)

95%







+1.0%

FEMALE LITERACY

(ADULTS AGED 15+)

94%





平均年龄



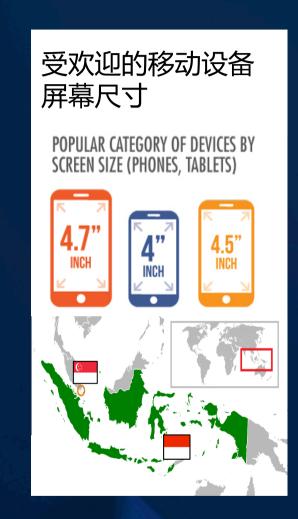
29.3



97%

了解印尼大数据的机遇

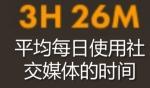












AVERAGE DAILY TIME

SPENT USING SOCIAL

MEDIAVIA ANY DEVICE



AVERAGE DAILY TV VIEWING TIME

(BROADCAST, STREAMING

AND VIDEO ON DEMAND)

2H 52M 平均每日观看 电视的时间

TOP VERTICALS







网上商务 网上游戏



应用

按需服务

1H 22M

平均每日听 媒体音乐的时间

AVERAGE DAILY TIME

SPENT LISTENING TO

STREAMING MUSIC

ON DEMAND SERVICES

了解印尼大数据的机遇





CONTENT STREAMING ACTIVITIES

PERCENTAGE OF INTERNET USERS WHO STREAM EACH KIND OF CONTENT EACH MONTH (SURVEY BASED)

WATCH VIDEOS ONLINE

在线观看视频

STREAM TV CONTENT VIATHE INTERNET

PLAY GAMES STREAMED LIVE VIA THE INTERNET

WATCH LIVE STREAMS OF OTHERS PLAYING GAMES WATCH E-SPORTS TOURNAMENTS











JAN

MOBILE APPS: INSTALLS vs. USAGE

A CLOSER LOOK AT THE NUMBER OF APPS DOWNLOADED AND INSTALLED, COMPARED TO THE NUMBER OF APPS USED

NUMBER OF MOBILE APPS DOWNLOADED DURING FULL YEAR 2018



5.087

BILLION

2018移动

应用程序下载的数量

TOTAL CONSUMER SPENDING ON MOBILE APPS DURING 2018 (U.S. DOLLARS)



\$313.6 MILLION 2018移动 应用程序消费

AVERAGE NUMBER OF APPS INSTALLED PER SMARTPHONE DEVICE

每个智能手机

设备平均

安装的应用数量



AVERAGE NUMBER OF

MOBILE APPS USED PER

MONTH PER SMARTPHONE

每个智能手机 每月使用的平均 移动应用数量





50%

通过互联网

传输电视内容

46% 通过互联网 直播游戏

直播观看 他人玩游戏

17% 直播观看 运动比赛

实际考查东南亚的挑战



在东南亚常见的的挑战 Common Challenges Faced in SE Asia

客户在印尼所面临的挑战 Doing Business in Indonesia

语言障碍 Language barrier

> 740方言 dialects Bahasa Indonesia & English Our staff are well verse in Bahasa Indonesia and understand the local culture well. Able to help customer navigates the obstacles they would not have solved in a shorter time.

文化 Culture

如何管理过时的放松心态 Old generation with laid-back mentality

Act as the bridge to bring both sides to a level ground of understanding. Help to advice customer on the expectation of dealing with local and also letting the locals understand the importance of customer expectation.

政府监管

Government regulation

Bureaucracy & Tax
(Example: Custom Clearance)

政策与税收

Having good understanding of local government regulations and relationship which in turn help customer to reduce unforeseen issues. Our connection as a national Telco can assist customer beyond infrastructure and network. Bringing more value as a partner to customers.



实际考查东南亚的挑战



在东南亚常见的的挑战 Common Challenges Faced in SE Asia 客户在印尼所面临的挑战 Doing Business in Indonesia

缺乏网络容量 Lack of network capacity

Insufficient capacity due to low usage for many years

服务效率 Long Leadtime for services

Unexpected demand leading to long leadtime to deploy service

稳定且经过认证的数据中心 Stable and certified DC

Challenging to find stable power & data centre with proven record

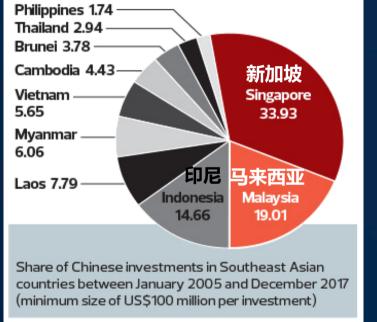


进入东南亚的要点 – 从新加坡出发









CENTRE FOR STRATEGIC AND INTERNATIONAL STUDIES

Asia's Best And Worst Countries For Doing Business

Singapore, closely followed by South Korea, remains the best country in which to run a business, according to the World Bank. Pakistan, Myanmar and Bangladesh are the region's lowest ranked economies.



Table 3: The overall costs of doing business in ASEAN

Score 1 (lowest cost) - 10 (highest cost)

	Singapore	Malaysia	Thailand	Vietnam	Indonesia	Philippines
Wage cost [1]	10	2.2	1.7	1	1.2	1.1
Corporate tax rate	1	5.8	3.1	3.1	6.5	10
Ease of doing business [2]	1	2.9	5.1	8.4	9.3	10
Macroeconomic stability [3]	1	5.5	6.3	10	7.8	7
Political stability [4]	1	6.1	6.9	10	9.6	10
Average	2.8	4.5	4.6	6.5	6.9	7.6

Notes: [1] Based on income per capita in USD terms, 2017; [2] Ease of Doing Business Index, World Bank, 2018; [3] Sovereign Credit Ratings, Standard & Poor's; [4] Political Risk Index, PRS Group, 2017 Sources: CEIC, KPMG, World Bank, S&P, PRS, DBS.

进入东南亚的要点 - 拥有广泛的区域网络连接





共同合作的成功案例





- BGP网络
- · CDN节点

Telin新加坡的全球合作伙伴

























感谢等所

