Wireless Broadband Internet current status and future

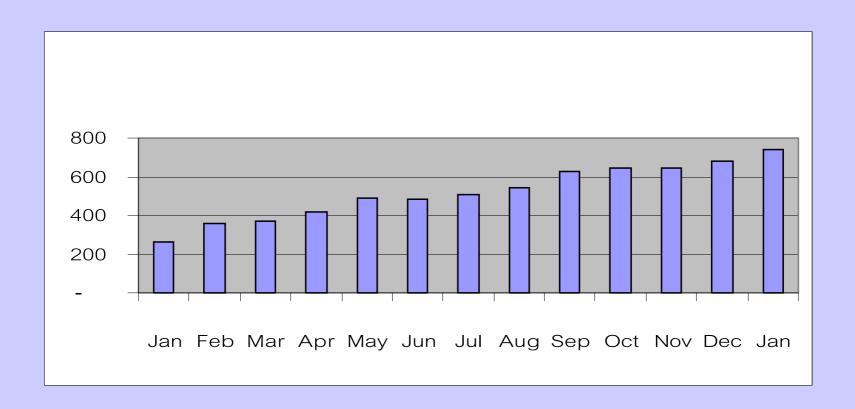
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Thailand overview

- Thailand country circuit connected to internet is estimated at 1500 Mbps (1000 Mbps domestic and 500 Mbps International)
- More than 50 % of usage are dial up access and most of the rest are leased lines.
- Broadband customers are less than 5,000 out of 3,000,000 internet users

Thailand actual active bandwidth International and domestic speed in Mbps (daily) Yearly bandwidth growth is 180%



Estimation of Broadband

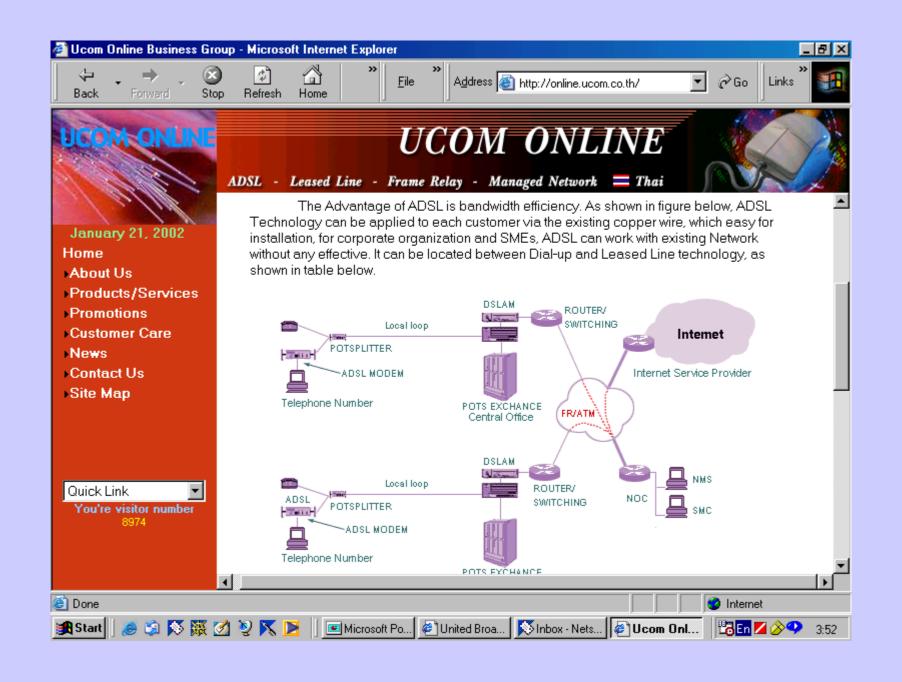
• At current growth rate, by 2006 Thailand active bandwidth will be 10 Gbps and out of that 30% will be broadband

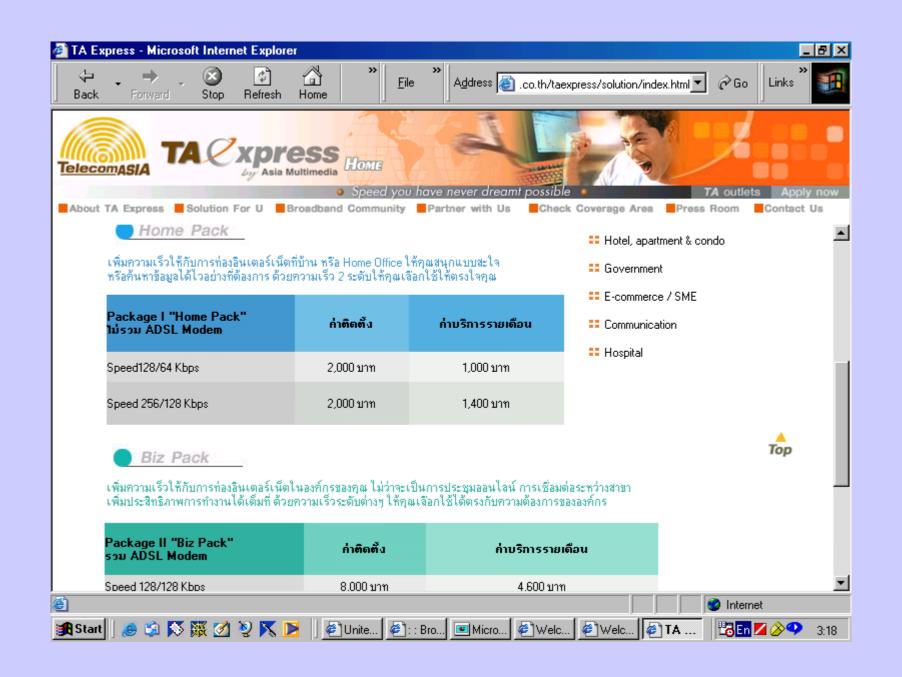
What is Broadband?

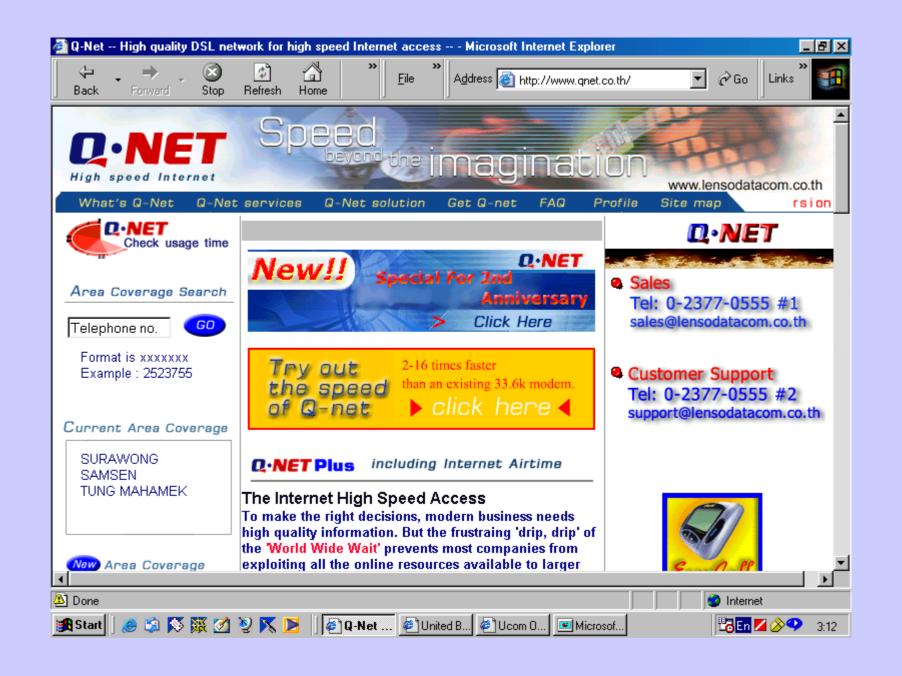
• For this presentation, Broadband means the internet access method other than dial up modem and leased line. Also such technology provide browsing speed faster than 128 Kbps and the price to (consumer) customer is less than 3,000 Bath per month.

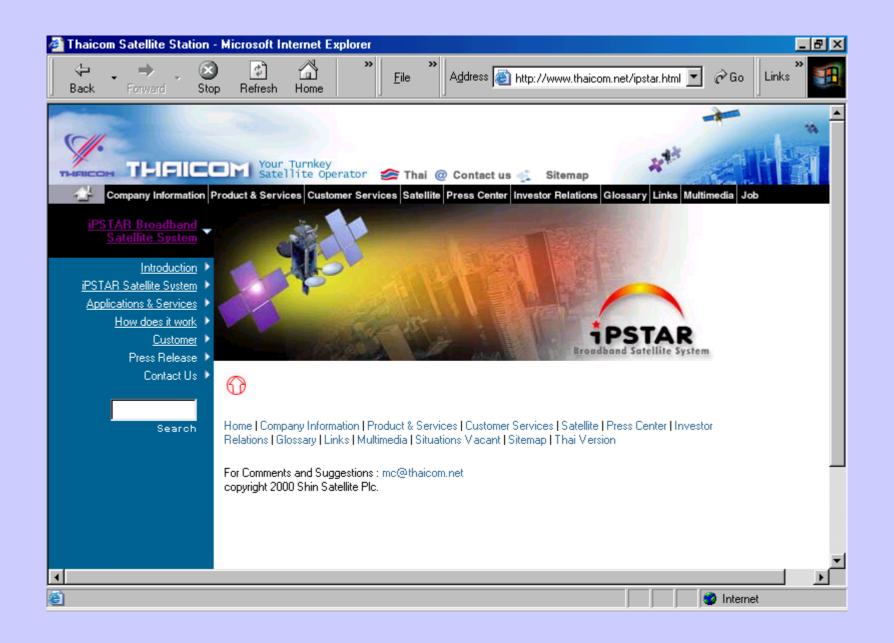
Broadband Providers

- UCOM ADSL
- TA Cable Modem and ADSL
- Lenso ADSL
- CS and Shin satellite iPTV and iPSTAR









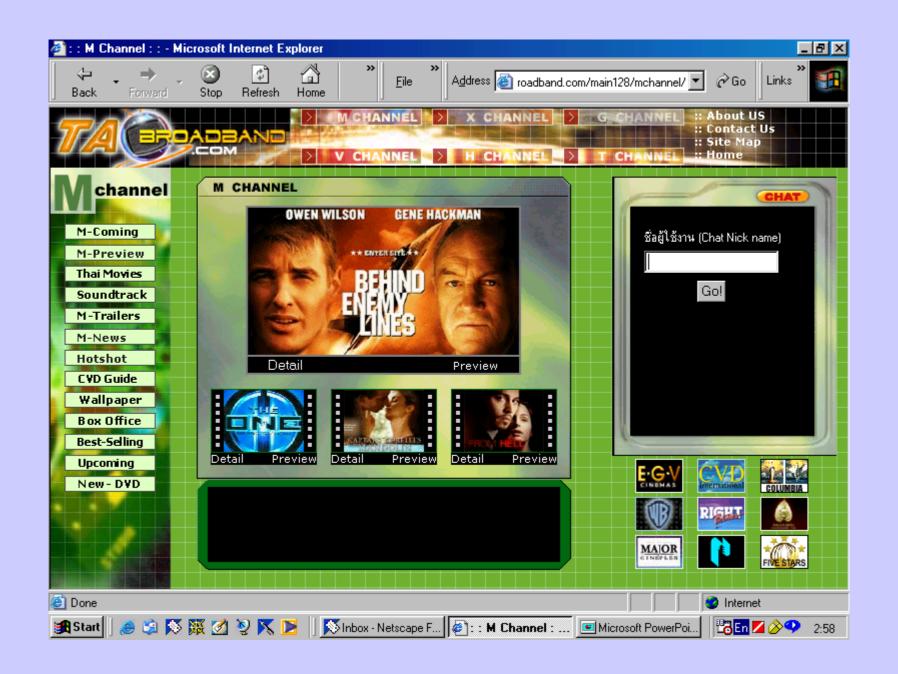
Content is Major Driver

- Major driver for broadband access is multimedia content
- Thus the content should be developed in parallel with broadband access network

Broadband content sites

 At least two operators have started to develop the broadband content sites in Thailand; TABROADBAND.COM and SHINBROADBAND.COM (IPTV)



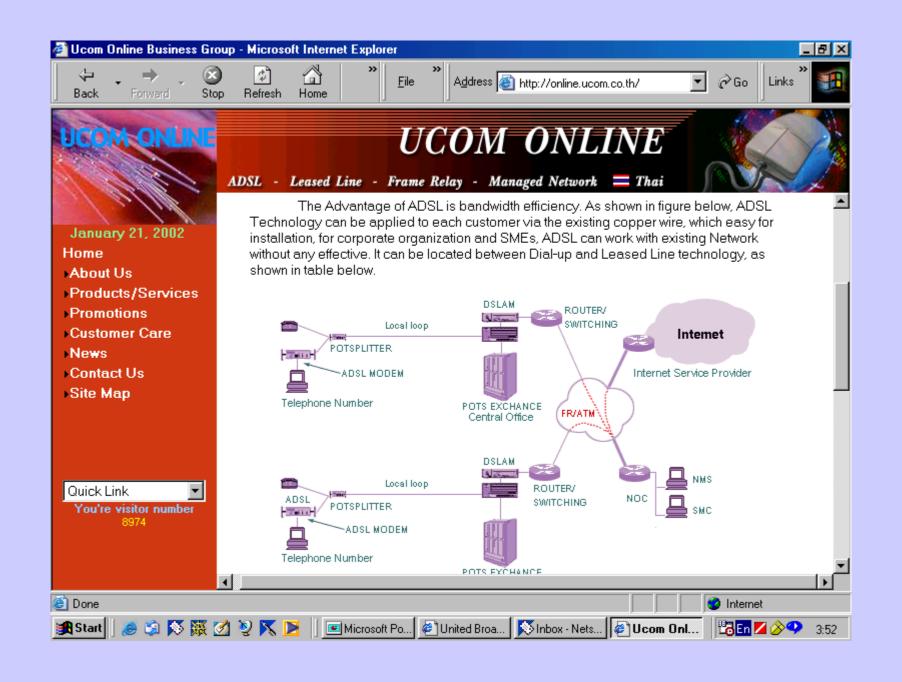


Coverage Area

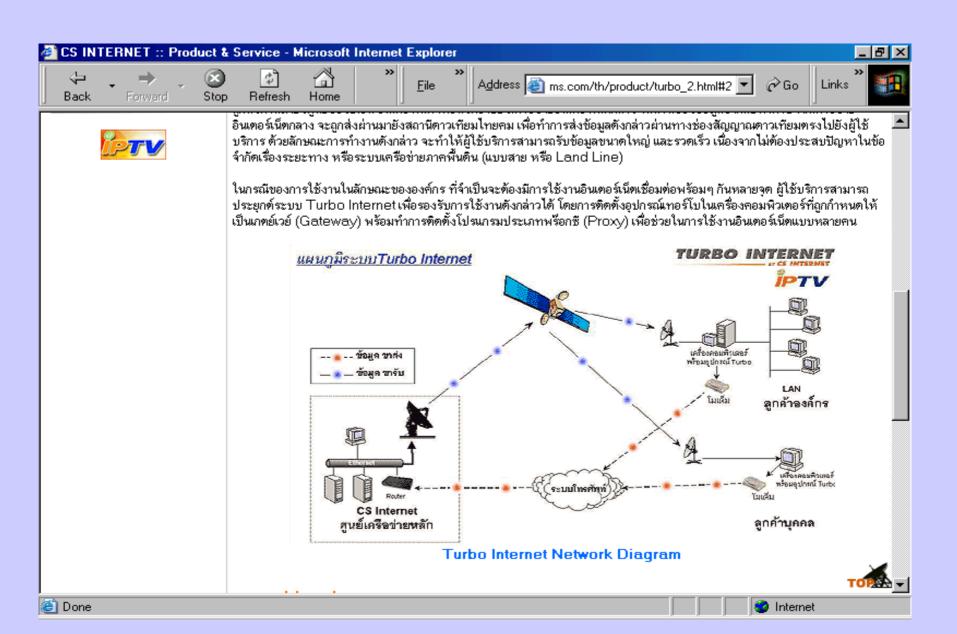
- Cable Modem and ADSL serve only Bangkok area
- Satellite system (iPTV and iPSTAR) serve all area nationwide
- Other terrestrial wireless system have not yet start

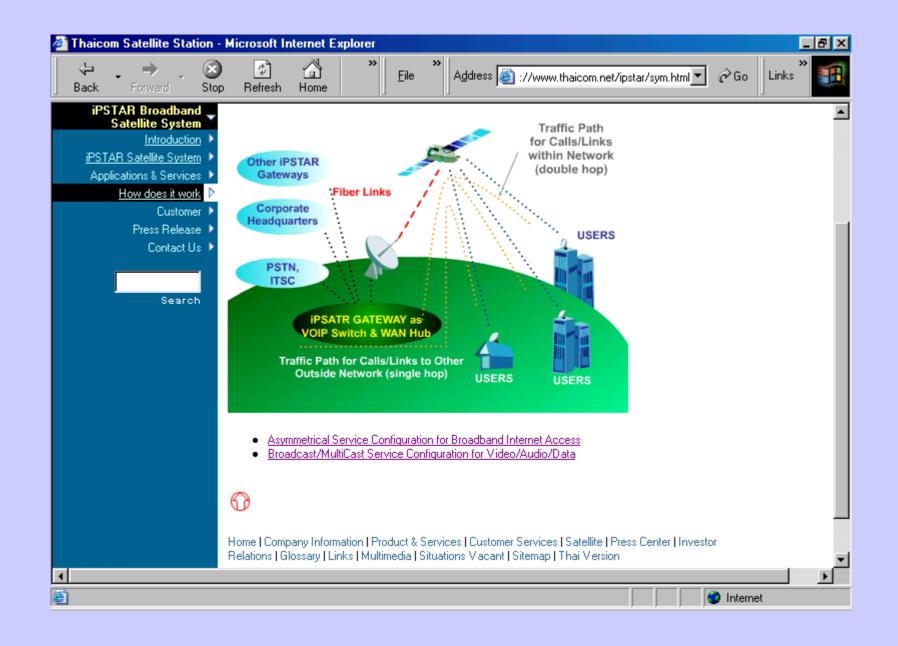
Current economic model

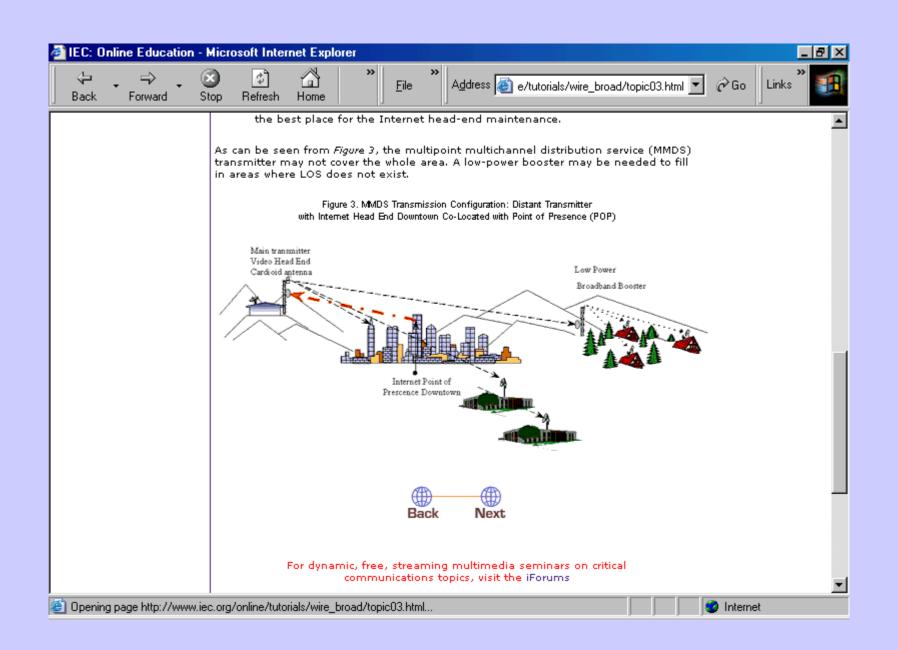
- ADSL and Cable modem is suitable for high density market such as Bangkok area
- While satellite is suitable for broader market coverage











Wireless Broadband Trend

- iPTV and iPSTAR will be the solution for wireless broadband
- The other terrestrial wireless technologies will be available but are subject to several conditions especially frequency allocation by NTC

Terrestrial Wireless Broadband Constraint

- The allocation of frequency spectrum is subject to the NTC (which is under a very long selection process)
- The return on frequency utilization v.s. television broadcast (especially for digital television)
- Line of site obstruction when offer in Bangkok against investment of cell site
- Light market density in upcountry area against investment

Possibility

• If the frequency spectrum are available and the frequency fees are attractive, then the terrestrial wireless will be suitable for small coverage area such as residential area in Bangkok. And only when the equipment cost is low enough, then the deployment in high rise area will start.

Possibility

- Wireless LAN is another booming segment. The use of wireless LAN in office, business area and airport is another key driver of wireless broadband (ie. Combine leased line with Wireless LAN)
- Also a combination between wireless technology and the home phone line networking alliance (Home PNA) is another area that has started

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