



“Bridging The Divide Means Broadbanding The Country”

Indonesia Digital Network IDN2015

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Direktur Utama PT Telkom



C O N T E N T

- **Telkom Highlight**
- **ICT Industry Landscape**
- **Indonesia Digital Network
(IDN 2015)**

TELKOM Highlight

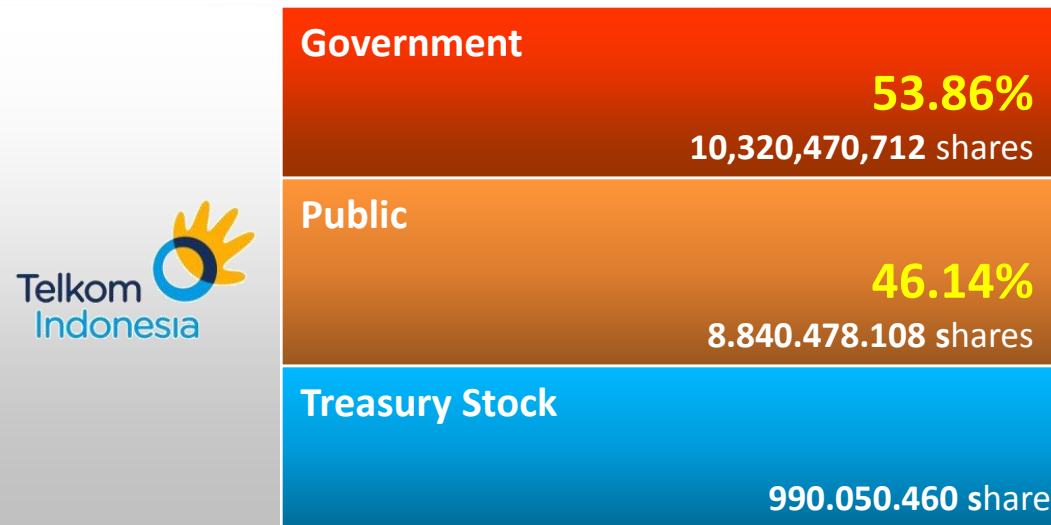


PT TELEKOMUNIKASI INDONESIA, Tbk



TELKOM is the biggest national telecommunication company, Indonesia Government is the major shareholder of TELKOM.

(Total shares= 20,159,999,280, includes Dwiwarna Series A share)



TELKOM's market capitalization is **USD 20 Billion or \pm 5 %** of total BEI market capitalisation (per Sept 19th 2012)

TELKOM is listed in **Indonesia Stock Exchange (IDX)**, **New York Stock Exchange (NYSE)**, **London Stock Exchange (LSE)** and also *Publicly Offering Without Listing (POWL)* in **Tokyo Stock Exchange (TSE)**



Instruksi Presiden RI



1

Fortune 500

Besarkan Telkom jadi perusahaan terkemuka di ASEAN, masuk Fortune 500

2

Blue Chip

Perusahaan Blue Chip di pasar Saham

3

Broadband

Bangun infrastruktur broadband yang unggul di Indonesia sebagai wahana integrasi Bangsa

Current Position

Forbes 2012 GLOBAL 2000 THE WORLD'S BIGGEST PUBLIC COMPANIES	724	 West Japan Railway	Japan
	725	 JBS	Brazil
	726	 Cliffs Natural Resources	United States
	726	 Telekom Indonesia	Indonesia
	728	 Mitsui OSK Lines	Japan
	729	 Cathay Pacific Airways	Hong Kong-China
	730	 Sprint Nextel	United States



10 Biggest Market Cap Indonesia Stock Exchange ~ Sep

No	Listed Stock	Market Cap (Rp. T)
1	ASII Astra International	299
2	HMSP HM Sampoerna	231
3	UNVR Unilever Indonesia	198
4	BBCA Bank Central Asia	193
5	TLKM Telekomunikasi Indonesia	191
6	BMRI Bank Mandiri	189
7	BBRI Bank Rakyat Indonesia	182
8	GGRM Perusahaan Gas Negara	100
9	PGAS Gudang Garam	89
10	UNTR Semen Gresik	86

- **Forbes : 726 Global Company**
- **Fortune Indonesia 100 : rank 2**
- **Market Cap ISE: Top-5**
- **Biggest BUMN Go Public**

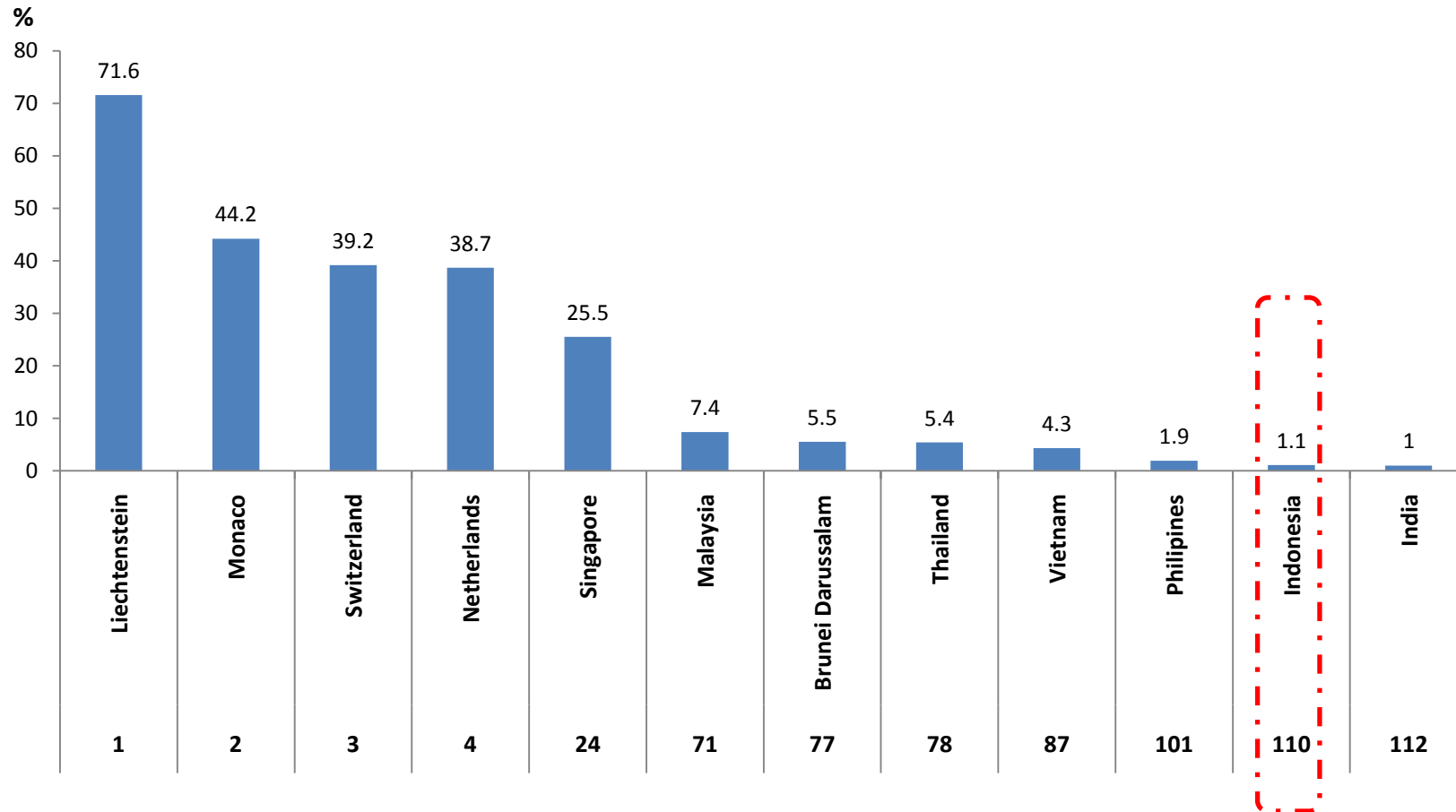
Ranking Market Cap Regional Nov 2012

SINGTEL	Singapore	Rp. 347.4 T
TELKOM	Indonesia	Rp. 189.8 T
AIS	Thailand	Rp. 177.6 T
PLDT	Philippine	Rp. 132.5 T
TM	Malaysia	Rp. 63.6 T

ICT Industry Landscape



Broadband Penetration: Indonesia is Lagging about 5 Years



THE STATE OF BROADBAND 2012: ACHIEVING DIGITAL INCLUSION FOR ALL, ITU-T, Sept 2012
Fixed (wired)-broadband subscriptions per 100 inhabitants, 2011

TELKOM Transformation



IDN untuk Memenuhi Tuntutan Kebutuhan Multi Layanan, dan Mendukung Upaya Pemerintah Dalam Program MP3EI

STRATEGI UTAMA MP3EI - Penguatan Konektivitas Nasional -

KERANGKA KERJA KONEKTIVITAS NASIONAL



IDN

Indonesia Digital Network

id-Access
Indonesia Digital Access

High Speed Broadband Access through
Optical Fiber Network & WiFi

id-Ring
Indonesia Digital Ring

IP-based and Optical Backbone
Network

id-Con
Indonesia Digital Convergence

Integrated Next Generation Network
for Multi Services & Multi Screen

Indonesia Digital Network

IDN

Indonesia Digital Network

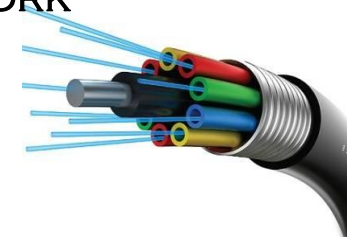
id-Access

- HIGH SPEED OPTICAL ACCESS NETWORK
- 15 M HOMEPASS
- 10 M WIFI



id-Ring

- IP AND OPTICAL BACKBONE NETWORK
- 30 NODE TERA ROUTER
- 30 K KM FIBER OPTIC



id-Con

- CONVERGENCE SERVICE PLATFORM
- MULTI SERVICES
- MULTI SCREEN



MP3EI : Telkom Support for Acceleration



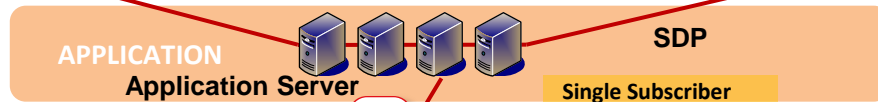
MP3EI 2012 - 2015

National Broadband Network in 2014
covers **30%** household or equal to
20 million customers

Telkom Support

- **15 million** broadband homepass
- **10 million** WiFi

IDN 2015 : Indonesia Digital Network



2015:
15 M Household
1 M AP Wifi

- Broadband for Business & Government
- Broadband for Residential
- Broadband for Community
- Broadband for mobility

↑
id-Con:
Coverage
Digital
Innovation

↓

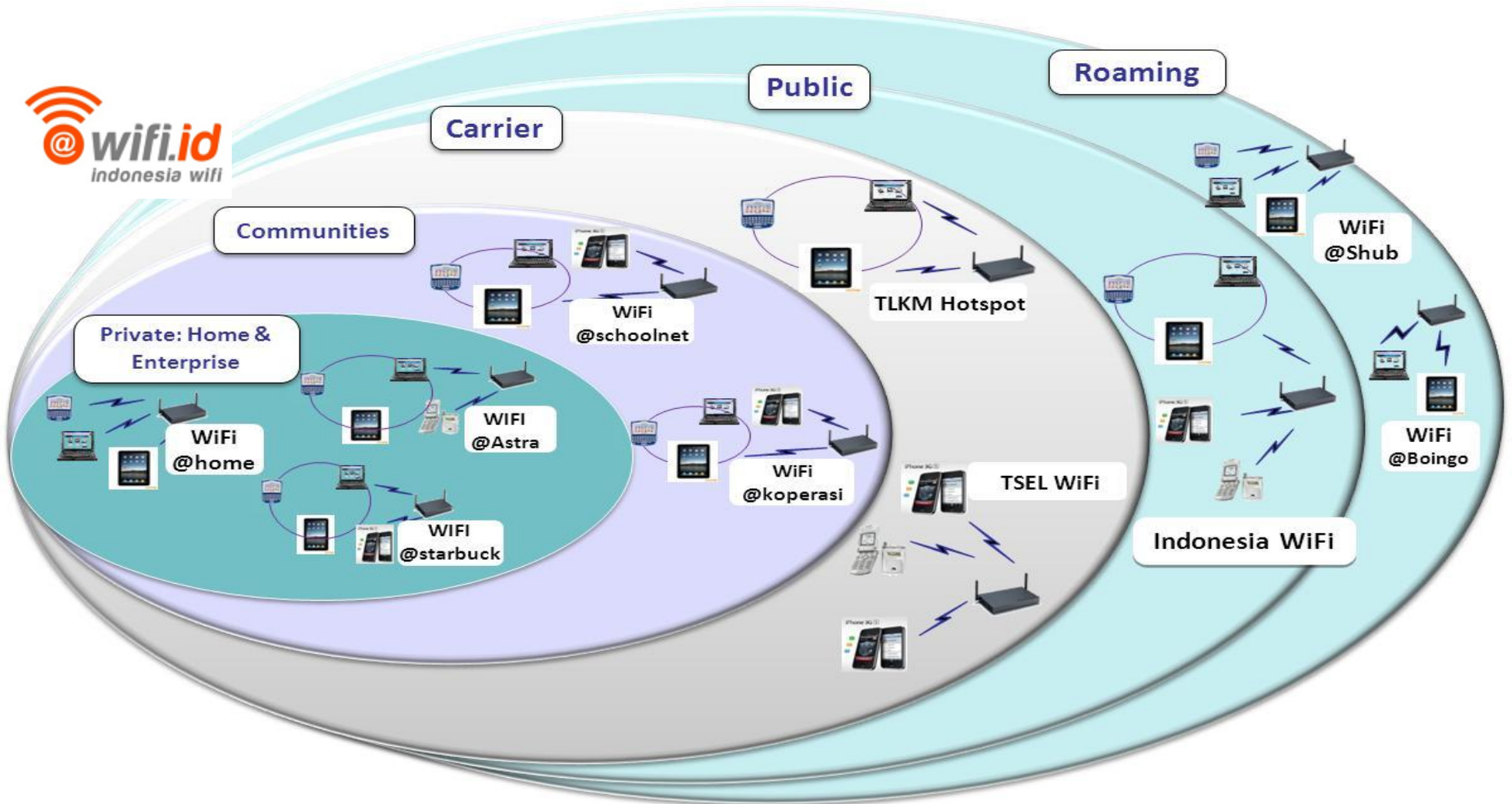
↑
id-Ring:
Nationwide
BB Backbone

↓

↑
id-Access:
True
Broadband
Access

↓










Strategi Telkom Dalam Memenuhi Tuntutan Pelanggan di Masa Depan (*High Speed Internet Access, Personal, Seamless and Mobil*) adalah dengan Menggelar *Indonesia Wifi*



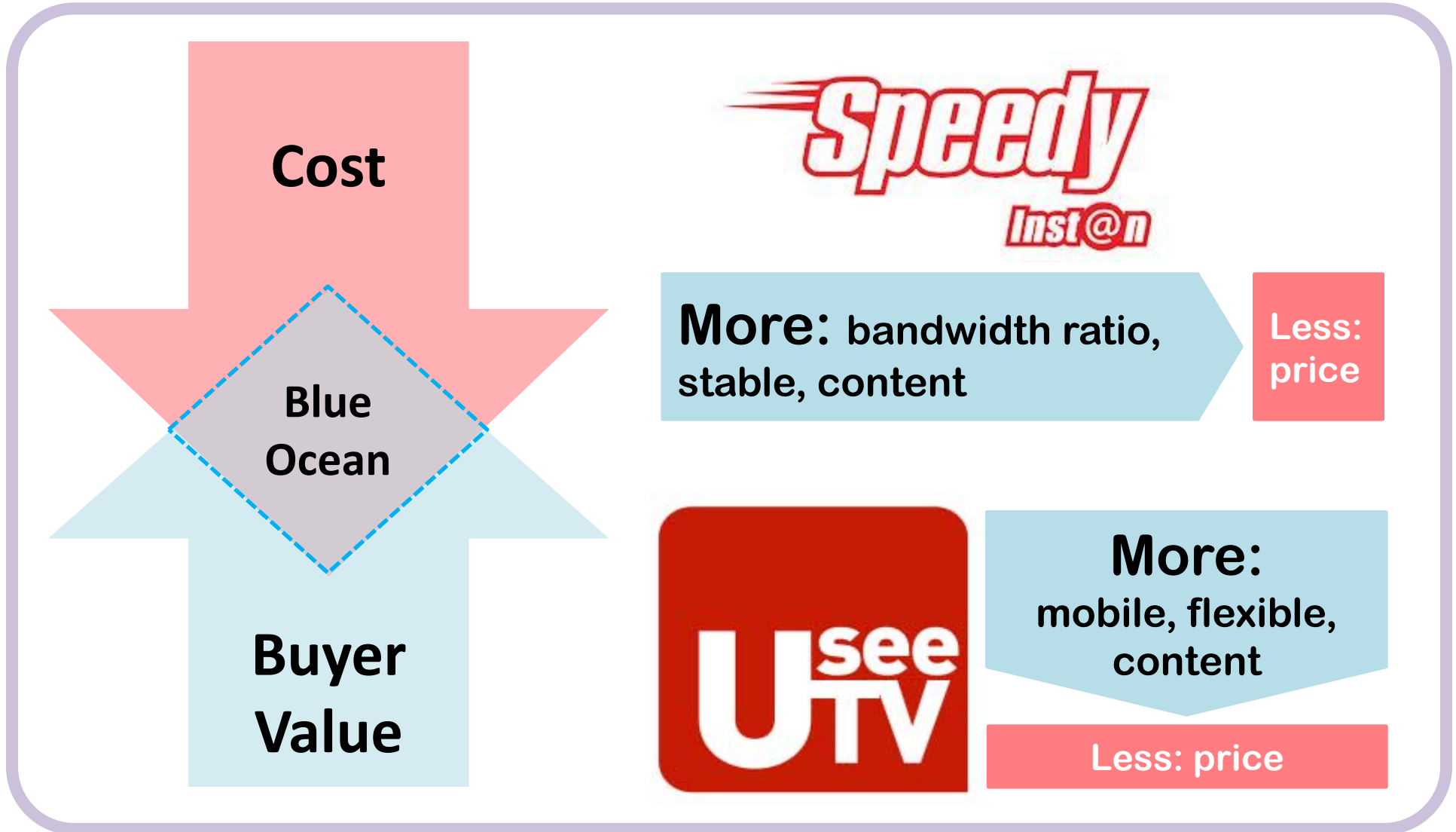
Beyond ICT: Business Model Innovation D-N-A!



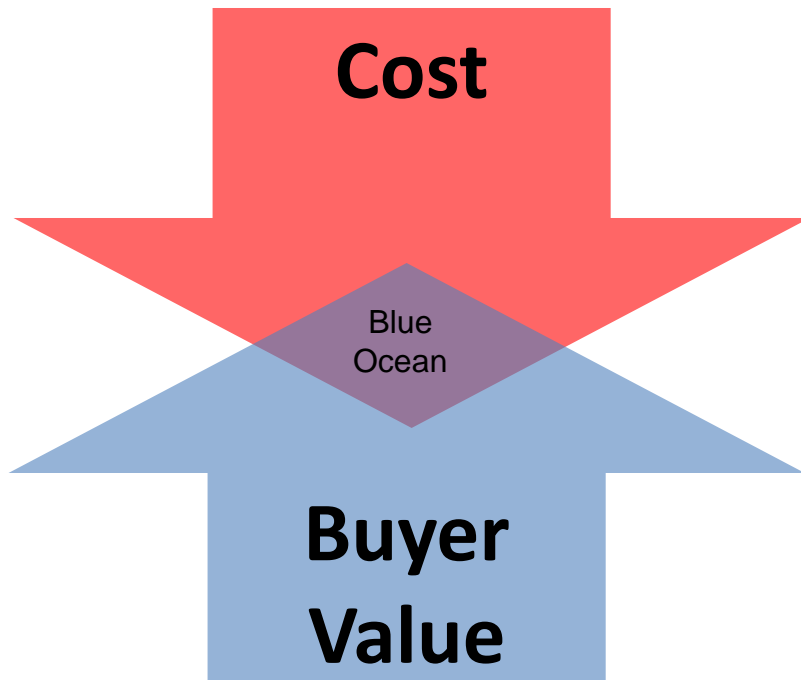
“Where is the multiple market cap to revenue value of application company higher than network company”

No.	Names	Company Types	Market Caps (billions U\$)	Revenue (billions U\$)	Value (multiple market cap/ rev)
	Apple	Device	254.55	42.91	6.0 x
	Nokia	Device	38.6	49.2	0.8 x
	Blackberry	Device	35	14.9	2.3 x
	Verizon	Net	93.37	27.11	3.4 x
	AT&T	Net	170.53	48.71	3.5 x
	Telefonica	Net	111.83	56.73	1.9 x
	Google	Apps	166.48	23.65	7.0 x
	Microsoft	Apps	206.91	58.44	3.5 x
	facebook	Apps	25	0.7	35.7 x

UseeTV: 'More for Less' creates a new Blue Ocean



The Simultaneous Pursuit of Differentiation and Low Cost ...

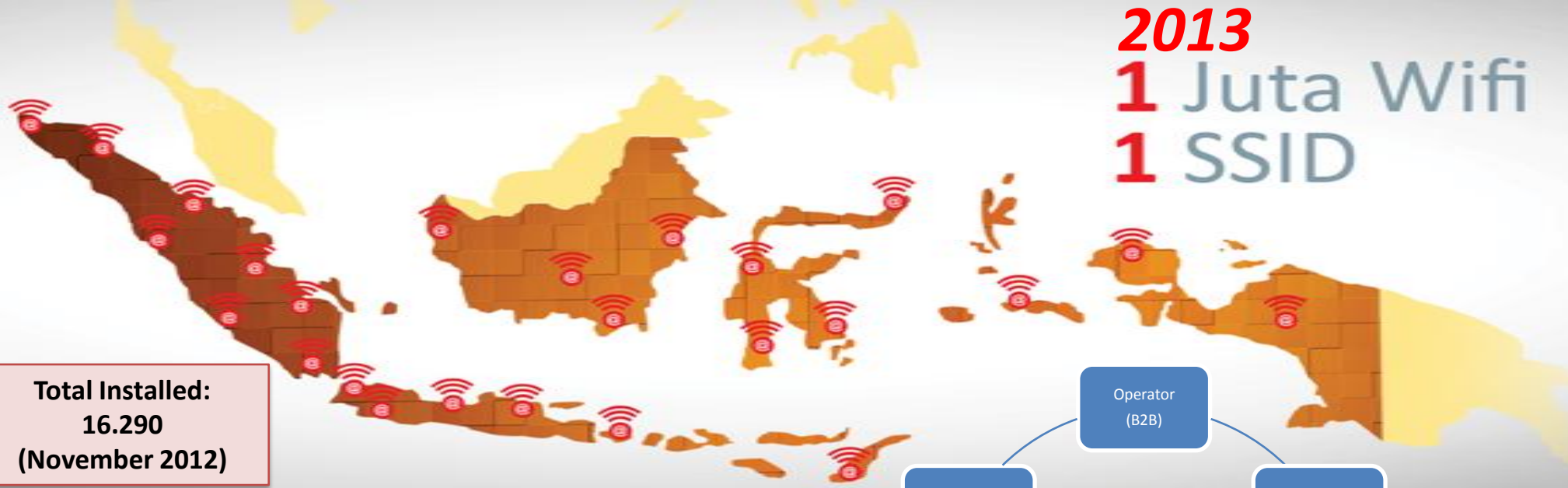


Mempublik-kan yang private

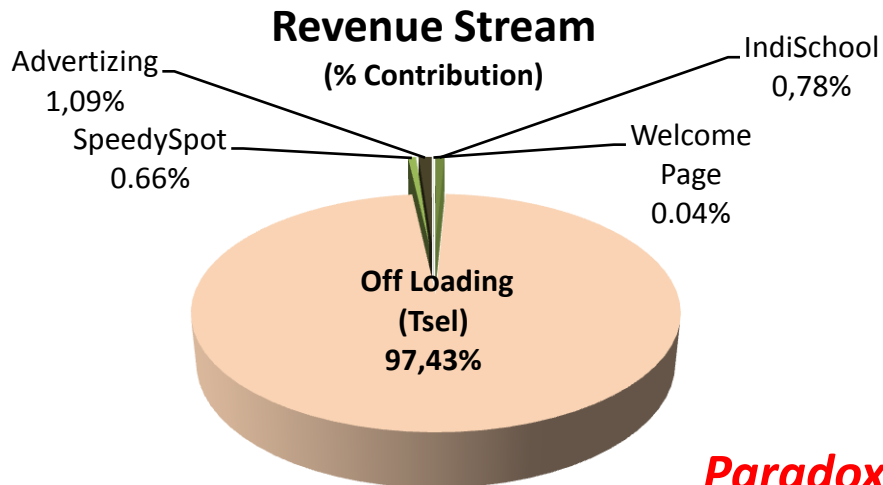


WiFi yang selama ini merupakan private akses diubah menjadi public access.

2013
1 Juta Wifi
1 SSID



Total Installed:
16.290
(November 2012)



Paradox Marketing "Mempublikkan yang Private"

Speedy
Inst@n

Dengan **SPEEDY INSTAN**
Browsing Tugas Sekolah
Sejam Gak Nyampe **Rp 1.000!**



STABIL & HANDAL

Dengan **Speedy Instan** Anda bisa mengatur pemakaian internet sesuai keperluan dan membayar sesuai paket pilihan. Nikmati juga nonton film dalam dan luar negeri atau gosip lokal sampai internasional dari UseeTV. Gunakan **Speedy Instan**, internetan terkontrol biayanya gak bikin kantong jebol.



Info: Hubungi **1 4 7**

- : www.telkomspeedy.com
- : [telkomspeedy](https://www.facebook.com/telkomspeedy)
- : [@TelkomSpeedyID](https://twitter.com/TelkomSpeedyID)

Telkom
Indonesia
the world in your hand

Telkom
Indonesia



Speedy Instan Card

*Tidak untuk diperjualbelikan

Rp. 5.000,-

Petunjuk penggunaan

- Aktifkan (register) Telkom ID di captive portal Speedy Instan atau Wifi.id
- Masukkan Telkom ID dan Password yang telah teregistrasi
- Nikmati browsing internet dengan Speedy Instan atau Wifi.id

Telkom ID

781565 924796

Password

Kartu ini berlaku sampai dengan:

Kartu ini dapat digunakan
di Speedy Instan atau di Wifi.id

Info hubungi: **1 4 7**

- <http://telkomspeedy.com>
- [telkomspeedy](https://www.facebook.com/telkomspeedy)
- [@TelkomSpeedyID](https://twitter.com/TelkomSpeedyID)

Telkom
Indonesia
the world in your hand

Potensi Industri Creative Indonesia

“Industri Kreatif memiliki tingkat pertumbuhan yang tinggi terutama Industri Kreatif digital”

Indonesia

The Indonesian government will boost development of the country's creative industry so that it will contribute at least 8 percent to the national gross domestic product (GDP) by 2015. (Vice President Boediono)

- Kontribusi Industri Kreatif terhadap GDP: **Rp151 T (7.28%** dari total GDP 2008)
- 5 Kontributor terbesar: **fashion (43%), crafts (25), advertising (8%), design (6%) & music (5%);**
- Potensi **pertumbuhan double-digit**, termasuk computer services and software (12.5%), advertising (12%) and interactive games (14.9%);
- Ekspor Industri kreatif 2009: sekitar **Rp114.9 trilyun (7.52%** dari total ekspor).

Sebagai solusi alternatif bagi :

- Rendahnya pertumbuhan ekonomi (**4.5%**)
- Tingginya tingkat pengangguran (**9-10%**)
- Tingginya tingkat kemiskinan (**16-17%**)
- Rendahnya daya saing industri dalam negeri .

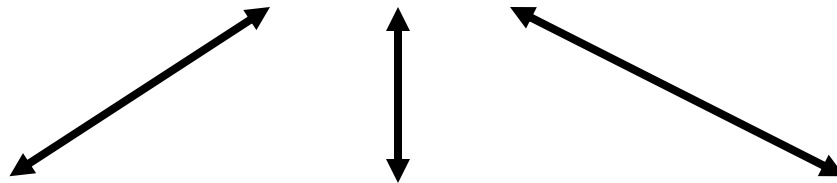
Building National Innovation Ecosystem



Initiative of TELKOM
Group to support
Digital Creative Industry
& Community

Indigo
(Indonesia Digital Community)

To leverage
“Digitalpreneur “
and
“Valuetainment Creativity”





Terima Kasih

*.... Jayalah Indonesia...
Jayalah Telkom Indonesia*

