



A Global Overview of FTTH

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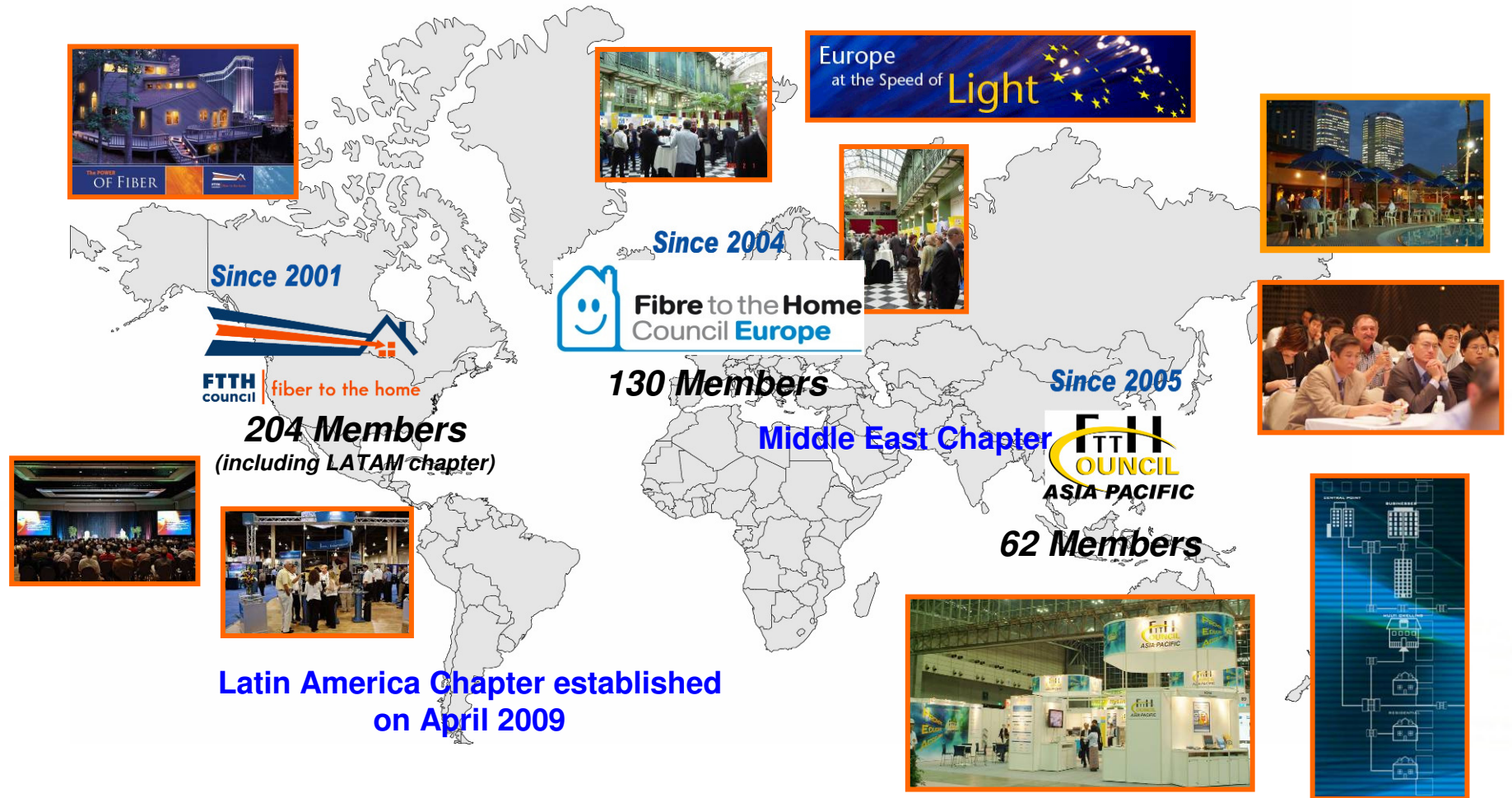
*Vice-President & Board of Directors, FTTH Council APAC
International Advisory Group APAC representative*

Seoul, FTTH Council APAC Annual Conference, May 25th

www.ftthcouncilap.org

FTTH council - Intercontinental Sister Organizations

Source: FTTH Councils (May2010)



Necessity to respect "Culture" & "History"

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FTTH councils - enhanced global collaboration

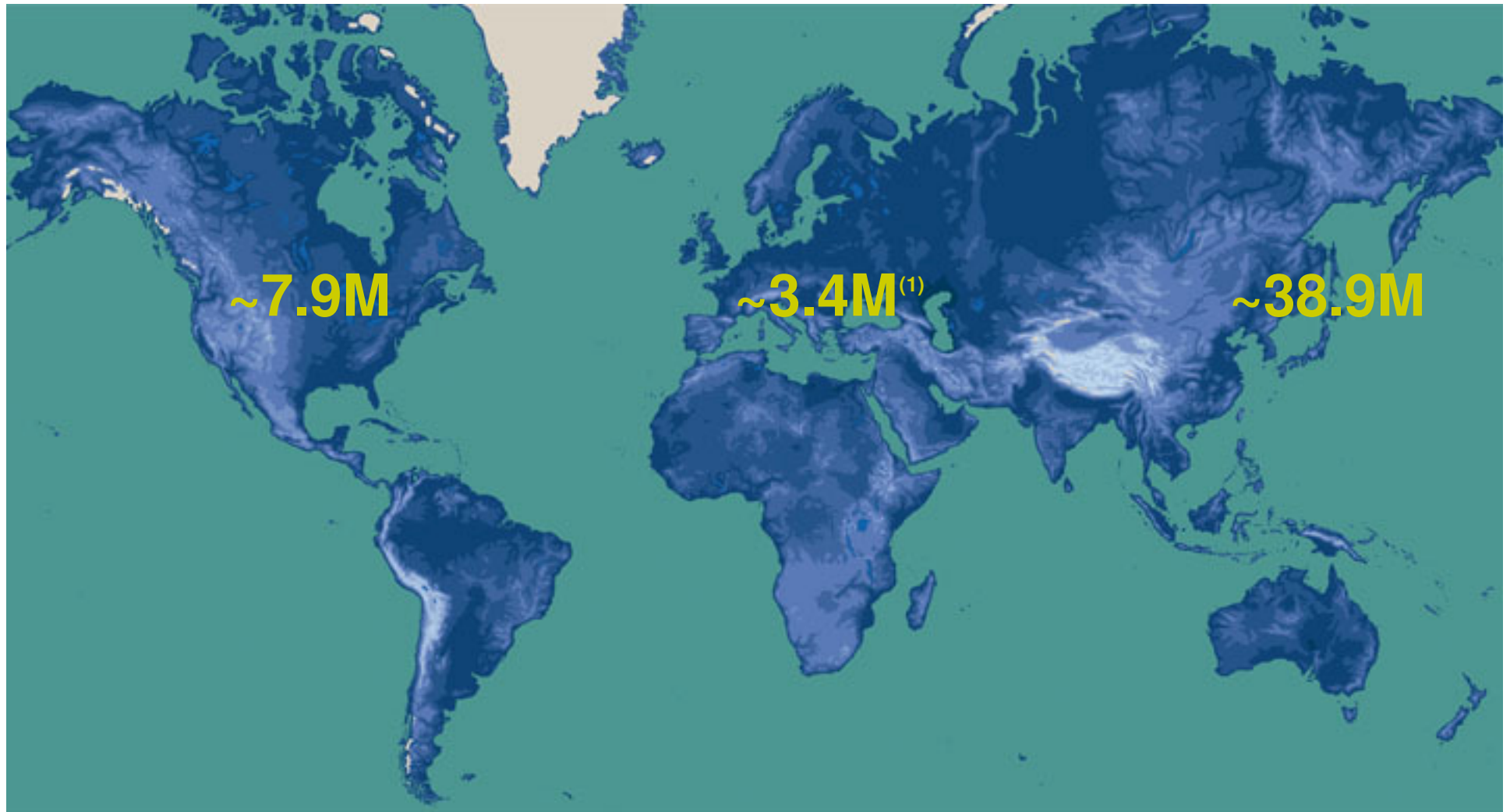
- January 9th 2009, definitions refreshed
 - FTTH Definition can be found on www.ftthcouncilap.org
- February 23rd 2010, vision & mission statements reviewed
 - Global themes (Economic Benefits; Sustainability; New Services...)
 - Coordination of strategies, projects & working plans



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FTTH/B Subscribers Connected (May 2010)

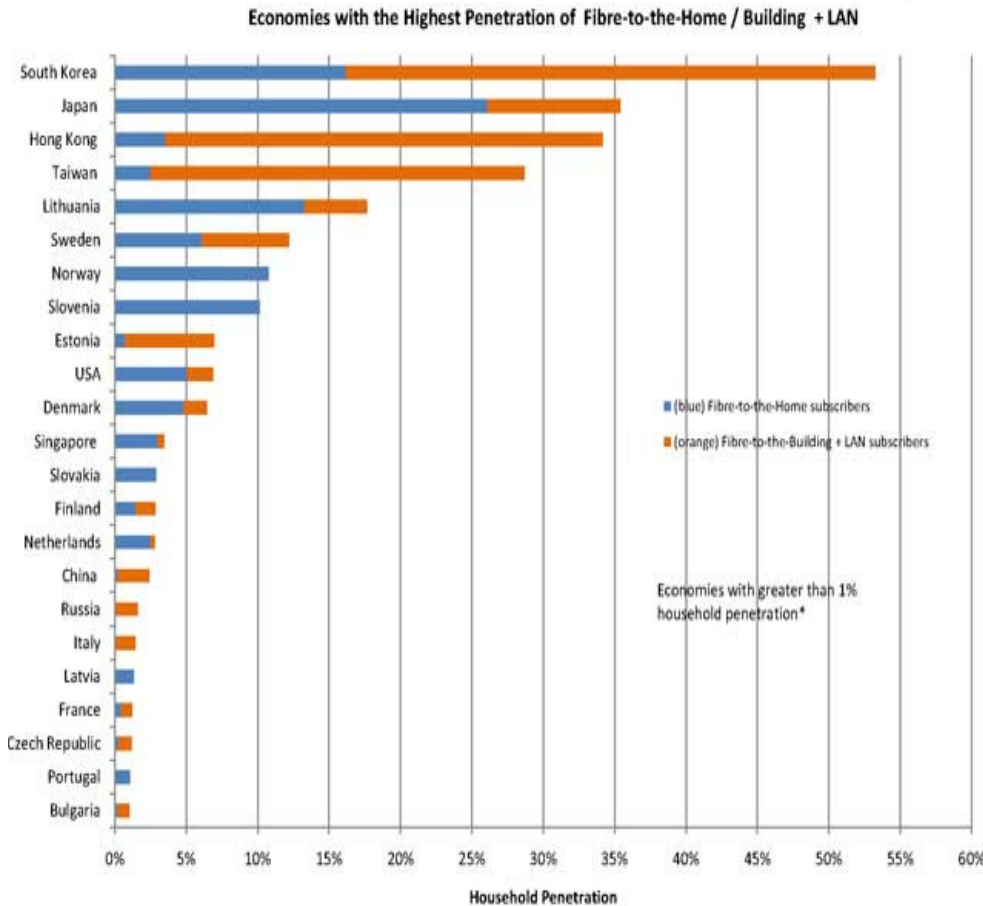


Source: FTTH Council International Advisory Group [FTTHCAP & Ovum; FTTHCNA & RVA; FTTHCEU & iDATE] (May 2010).

(1) including Russia

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Global FTTH Ranking (May 2010 ranking)



May 2010 Ranking
Source: Fibre to the Home Council
May 2010

*Economies with at least 200,000 households

^[1]The FTTH Global Ranking is based on the FTTH Councils' definition of FTTH/B: it includes both Fibre to the Home (FTTH), where the fibre connection reaches direct to the household, and Fibre to the Building (FTTB), where fibre terminates inside the boundary of a multi-tenant building. The Ranking covers all countries with at least 200,000 households where the penetration of FTTH/B has reached 1% of the total number of homes.

Triumphant success around the world

50M+ subscribers (+12M vs. May 2009 ranking)

- FTTB represent majority (~60%)

South Korea is number 1 (penetration)

- 1st country with > 50% FTTH/B household (HH)

23 countries ^[1] qualifying

- Only 7 of "world leading economies" (G20)

Top 7 Global economies (subscribers):

- S.Korea, Japan, USA, China, Russia, Italy & France
- Represent > 90% of all FTTH/B subscribers
- S. Korea & Japan > 35% HH connected

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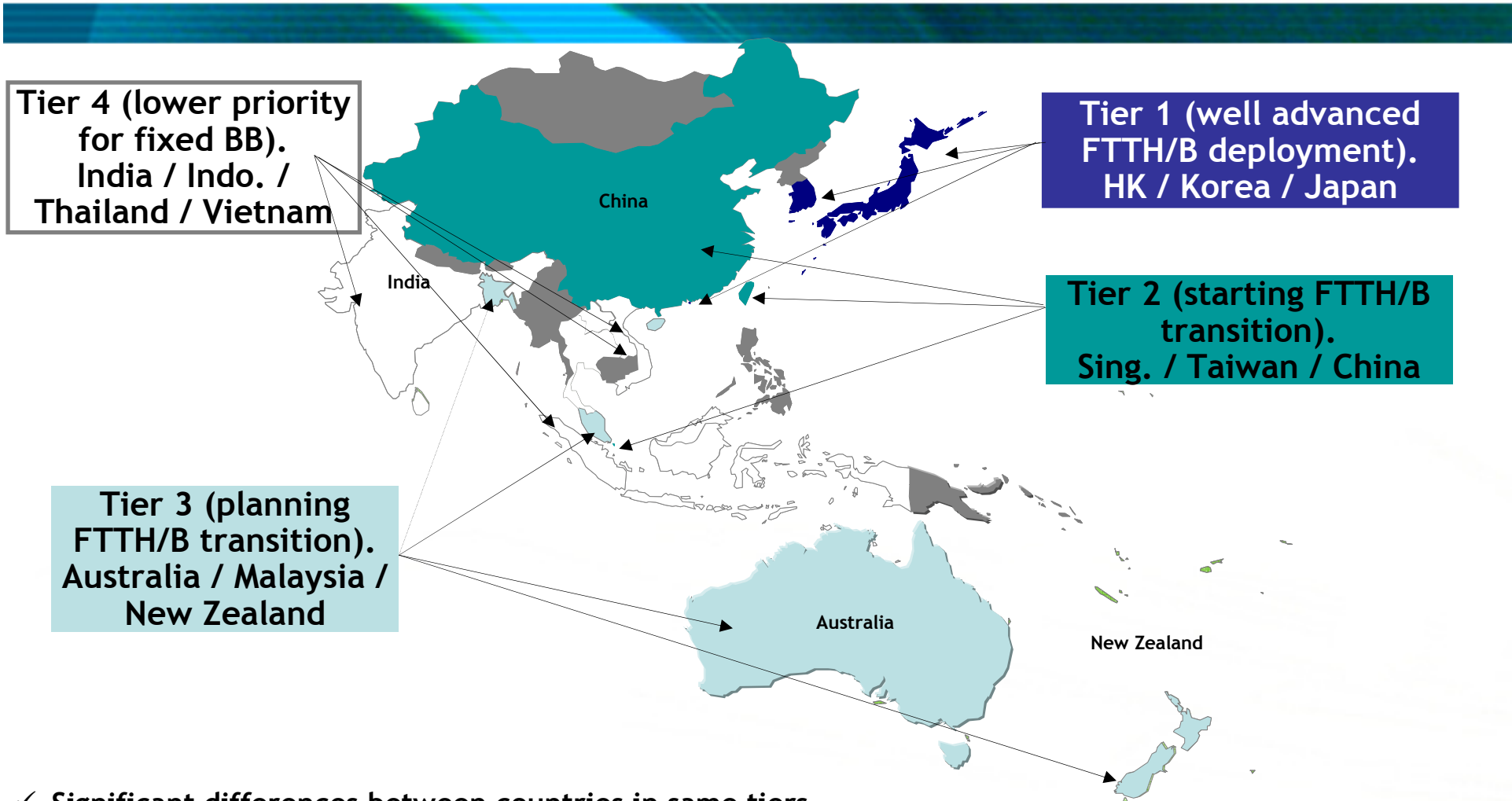
FTTH Global Ranking - APAC updates (vs. May 2009 ranking)

“What is most encouraging is that more & more countries have started to embark on this exciting journey of FTTH deployment realizing social and economic benefits that the technology brings.”
FTTH Council Asia-Pacific President Y.K. Loke

Sustainable FTTx growth in Asia-Pacific

- 38.9 million subscribers (+8.9 million). 61% is FTTB
- China has the highest growth
 - 9.6 million subscribers (+2.7 million). 92% is FTTB
- South Korea still largest FTTH/B penetration
 - 52.3% penetration (+8.7pts). 70% is FTTB
- Japan maintain leadership of FTTx subscribers
 - 17.2 million subscribers (+2.8 million). 62% is FTTH
- Strong global FTTx subscriber growth despite the recession:
 - Taiwan 25% (+12.9pts), Hong Kong 33.5% (+6.3pts),
 - Japan 34.5% (+5.6pts), Singapore 3.2% (+2.0pts), China 2.2% (+0.6pts)

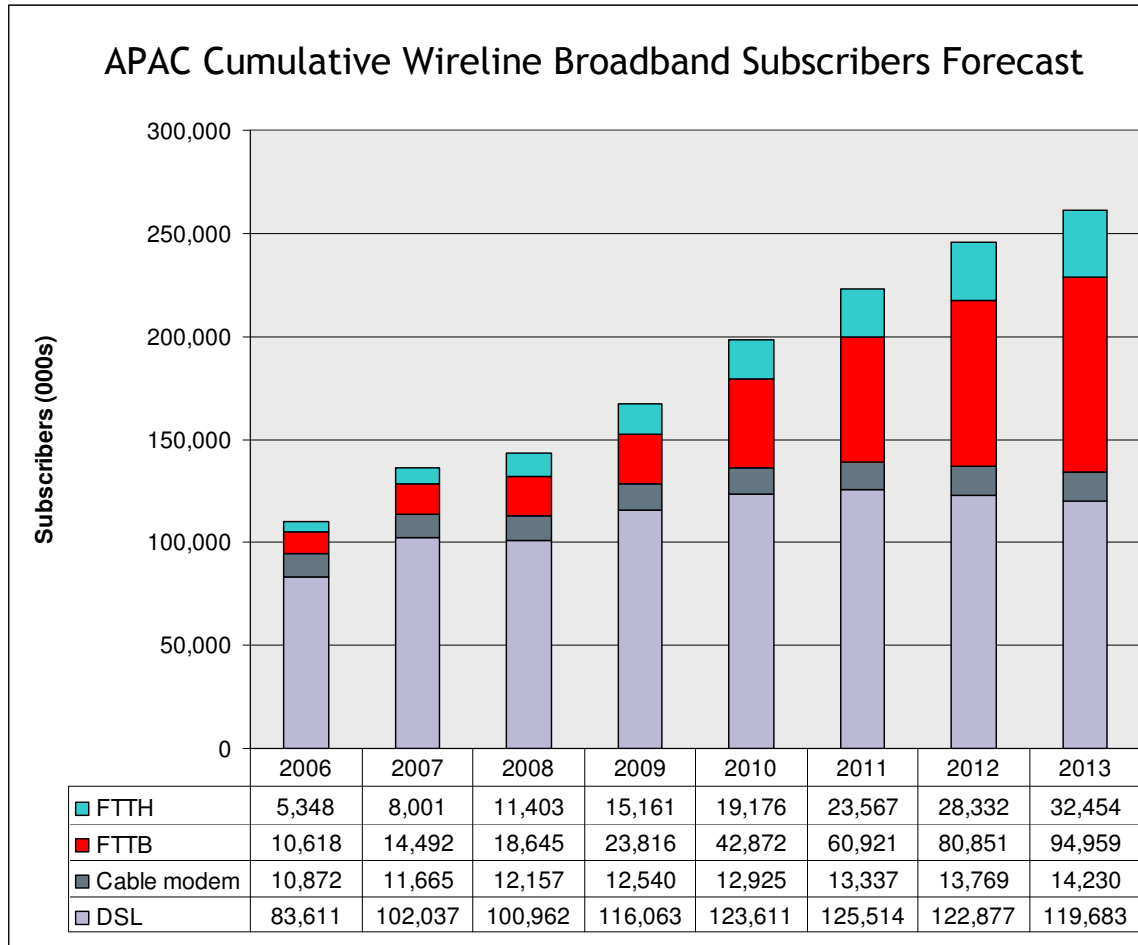
APAC markets differentiated by strong regional goals



- ✓ Significant differences between countries in same tiers.
- ✓ China changed (Tier 3 to Tier 2) since last year, resulting from large-scale FTTx deployments 2008-2009
- ✓ Malaysia moved from Tier 4 to Tier3. Vietnam appearing in Tier 4

Source: FTTH Council APAC. The Impacts of Government Policy and Regulation on FTTH within Asia Pacific. March, 2010 ©

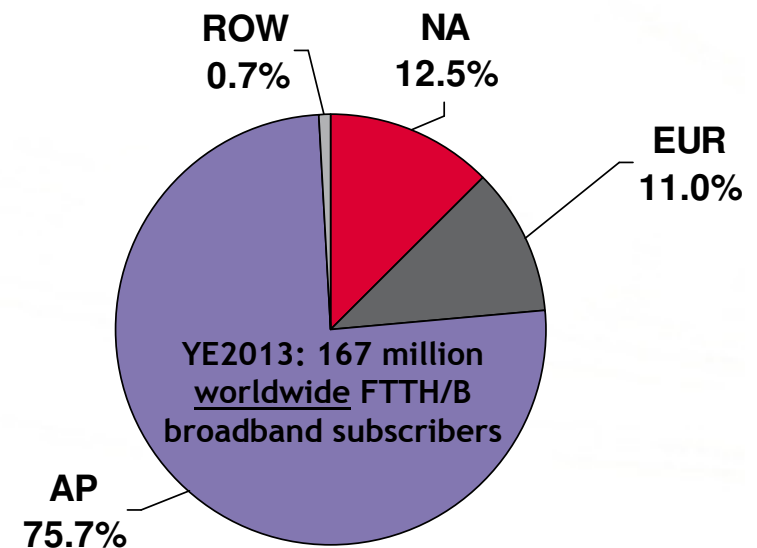
APAC is on the road to 130 million FTTx subscribers



Sources: FTTH Council APAC/Ovum. Feb.2010

APAC FTTH/B YE2013:

- ✓ ~130M subscribers
- ✓ 25% FTTH, 75% FTTB
- ✓ ~50% of wireline BB



Source: Ovum. May/2010

Asia Pacific market leadership expected to continue

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Concluding remarks

- APAC ~ 80% of world FTTH/B subscribers is growing fast
- Government policy play instrumental role in FTTx development
 - Many lessons to be learned from Korea, Japan and other leaders
 - Correlate FTTH development to national development
- We congratulate recent FTTH announcements
 - Critical dynamic “government drive ⇔ stakeholder identification”
 - Build innovative solution for industrializing “Content & Applications”
 - Business-centric cloud computing, Multi-Screen video, web-enabled social services...
- Next update of the FTTH Global Ranking (September 2010)
 - FTTH Council North America’s annual conference in Las Vegas

Thank you for your attention!
Wish you a great Annual Conference

Embrace the FTTH changes!

