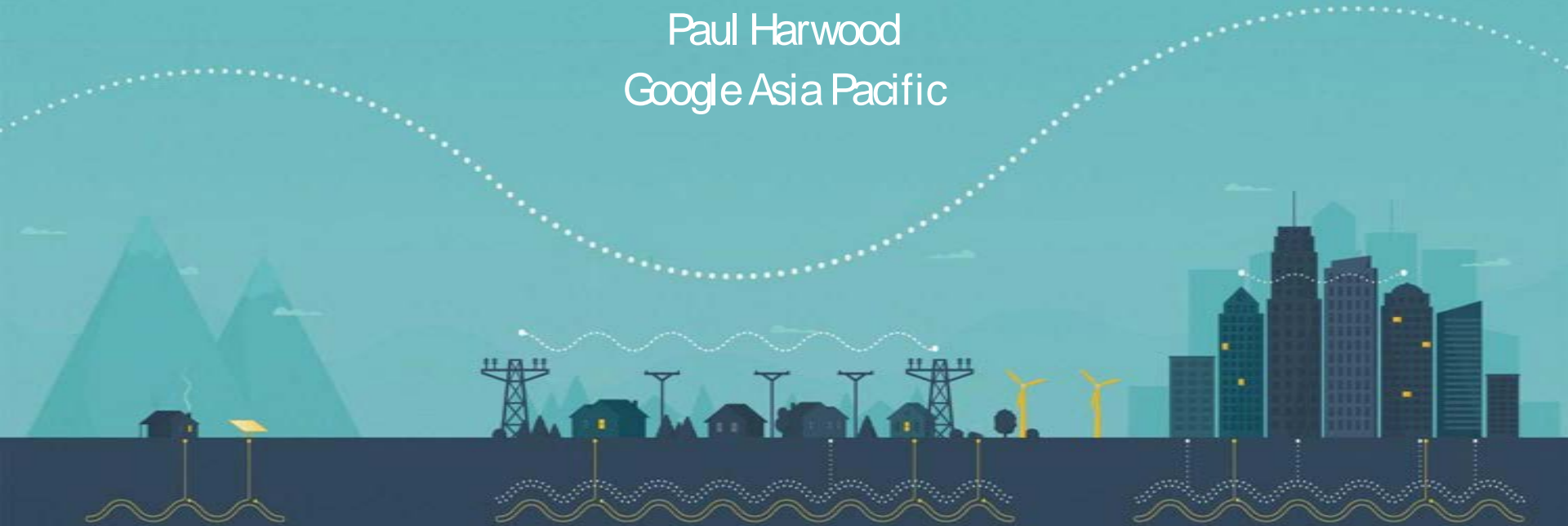


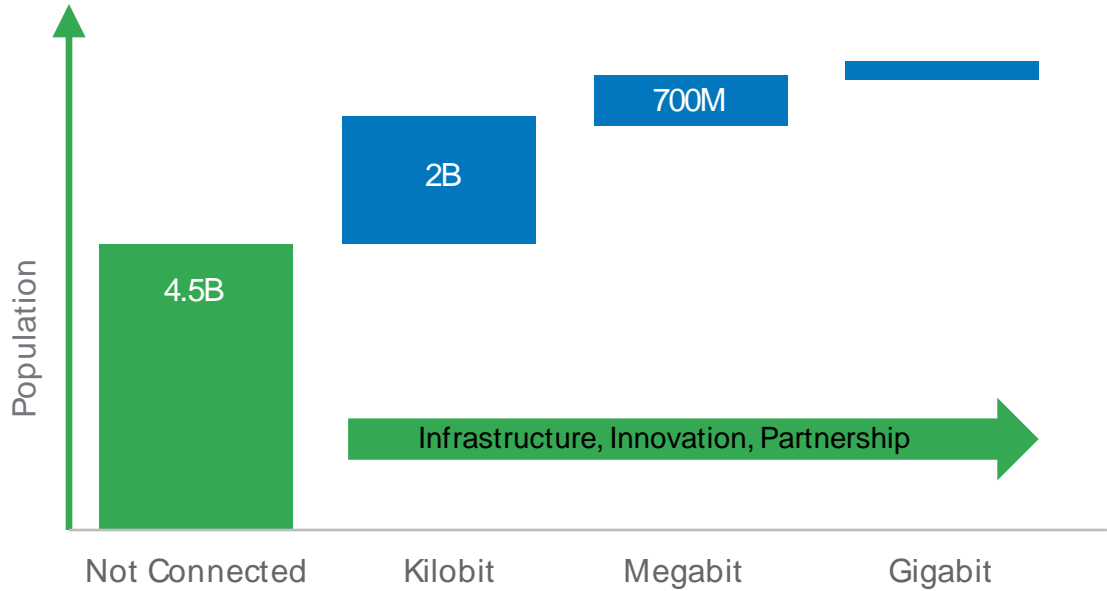
BROADBAND IN ASIA-PACIFIC

HOW INVESTMENT, PARTNERSHIPS AND POLICY ARE DRIVING A GLOBAL SUCCESS STORY

Paul Harwood
Google Asia Pacific



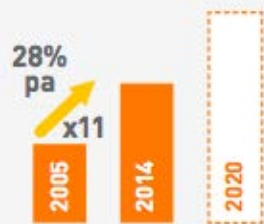
The State of Access



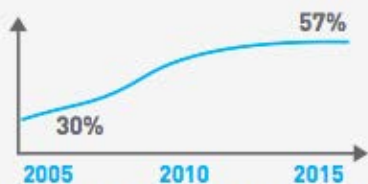
Mobile First



Driver of Growth



GROWING BROADBAND TAKE-UP



GROWING WEIGHT OF DATA REVENUE



GROWING TELCO REVENUE

Resulting in **increased weight of profits** from data services

PLDT
Smart Pinoy
Grameenphone
Wowbox
KDDI
Smart Pass



e-Commerce for overseas Filipino workers

Ad-funded content for cost-conscious mobile users

Unlimited Android apps for a monthly fee

The Internet Contributes as much as 8% of GDP in some economies, powering growth and creating jobs



Internet users have a high willingness to pay for broadband...

Willingness to pay of Internet users is over **30%** higher than current spend



...and many Internet users are willing to upgrade their services

More than **50%** of mobile users would consider upgrading at the right price and quality

And more than **60%** of fixed users would consider upgrading at the right price and quality

- Content Applications Providers invest USD33 billion per year into the broadband ecosystem; USD7.7 billion per year in APAC
- We have co-invested in three other submarine cable builds - UNITY (US-Japan); SJC Cable (Southeast Asia-Japan); MONET (US-Brazil)





Available networks and services



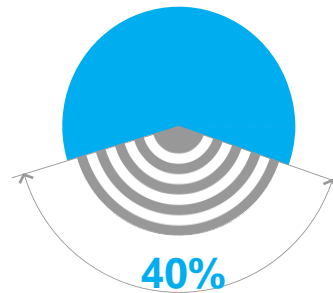
Affordable devices and services



Relevant content and applications



Readiness to use broadband services



In countries with low broadband take-up and usage, 40% of the top 40 websites are **not** in local languages (vs. 20% for *Connecting* and less than 5% for *Connected* countries)

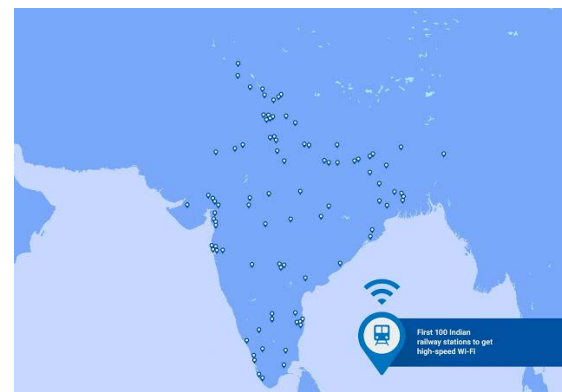


75% of non-adopters cited awareness as a main reason for not taking up Internet / broadband services



Wired and Wireless





How to connect to fast, free Wi-Fi
made for India by Google

- In your device's Wi-Fi settings, select the RailWire network.
- Open your browser and enter the URL railwire.co.in into the browser window.
- Then, enter your phone number in the Wi-Fi login screen and press RECEIVE SMS.
- You'll receive an SMS message with a 4-digit OTP code. Enter the code in the Wi-Fi login screen and press DONE.
- From there, you'll see a checkmark letting you know you're now connected to fast, free Wi-Fi.

Policies to Support Access



Policy & Access



Innovation in high speed Internet access should be a top public policy priority. Policy makers need to make sure that their countries are Internet -ready

FIBER- READY

Policies to facilitate deployment of fiber- optic cables into and within a country

WIRELESS- READY

Policies that facilitate Internet access using wireless spectrum

CONSUMER READY

Policies that ensure elements crucial to consumer demand – e.g. relevant content, accessible devices, and digital literacy