The State of Access

Population

- 4.5B Not Connected
- 2B Kilobit
- 700M Megabit
- Gigabit

Infrastructure, Innovation, Partnership
Mobile First
Driver of Growth

- **Growing Broadband Take-up**: 28% pa (2005), x11 to 2014, x2.3 to 2020
- **Growing Telco Revenue**: 9% pa (2005), x2.3 to 2014, x2.3 to 2020

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

*Google*
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)
Barriers

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

*Source: Analysys Mason primary research*
Wired and Wireless
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