



FTTH China 2009

FTTH Council Asia-Pacific

9 September 2009

Benjamin Reboul

Vice-President, Board of Directors

Chairman of the International Advisory Group

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Who we are & What we do

International Industry Association :

Non-Profit Organization Registered to Singapore, March 2005
Voluntary Board of Directors
represents all areas of broadband industries,
including telecommunications, computing, networking,
system integration, engineering and content-provider
companies, as well as traditional telecommunications service
providers, utilities and municipalities.

Mission :

-to accelerate the adoption of optical fibre access,
-by all consumers and organisations that provide and use broadband
services,
-through factually based Education and Promotion,
-in order to enhance the sustainable quality of life
within the Asia Pacific Region.

The Council will bring together industry stakeholders, government
representatives and developers and aims to position itself as the major
resource base for optical fibre access in the region.”.

Objectives :

- Supply a consistent and accurate view of FTTH all over APAC
- Promote FTTH market development all over APAC
- Be recognized by the industry as the FTTH advisory in APAC



See the Light

Our Intercontinental Sister Organizations

North America
Since 2001
FTTH council fiber to the home
214+ Members

Europe
Europe at the Speed of Light
Since 2004
FTTH COUNCIL Europe
104+ Members

Middle East Chapter
Since 2005
FTTH COUNCIL ASIA-PACIFIC
55+ Members

Latin America Chapter established on April 2009

Asia-Pacific: FTTH COUNCIL ASIA-PACIFIC

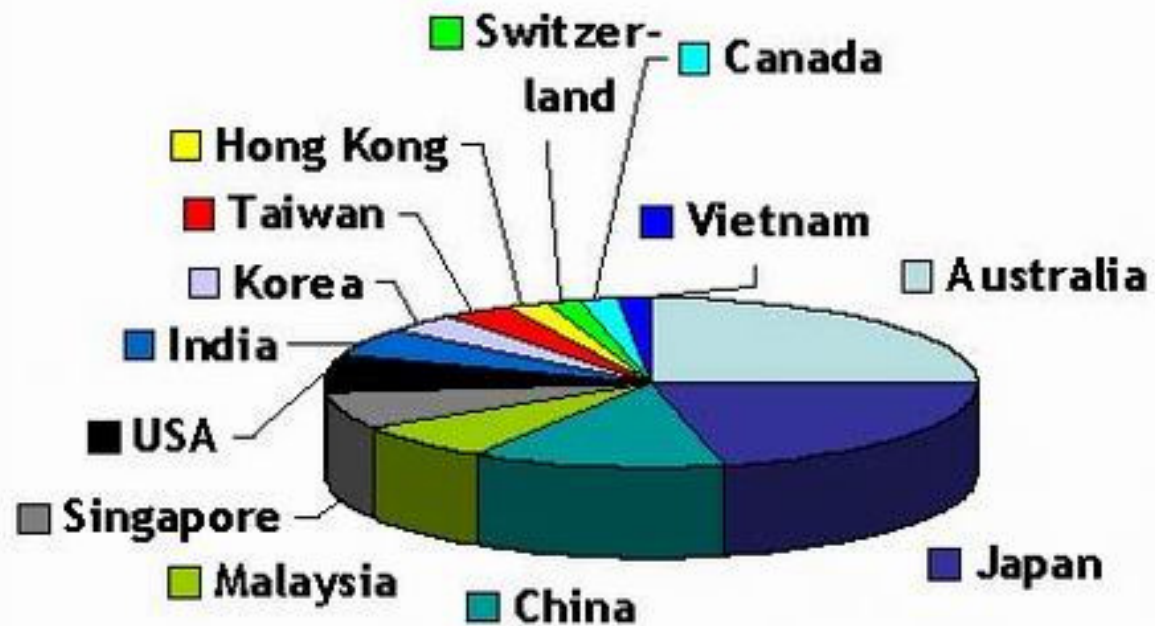
Various inset images show fiber optic technology, industry events, and people in professional settings.

Necessity to respect "Culture" & "History"

Membership (by Country) as of June 2009

Total: 56 Members

Australia	14
Japan	12
China	7
Malaysia	4
Singapore	4
USA	4
India	3
Korea	2
Taiwan	2
Hong Kong	1
Switzerland	1
Canada	1
Vietnam	1



Board of Directors (May 2009 -)

Title	Name	Company	Country
President	Yoon Kun Loke	ADC Krone	Singapore
Vice President	Benjamin Reboul	Alcatel-Lucent	China
Treasurer	Shinichiro Ota	Furukawa Electric	Japan
Secretary	Yoshiaki Miyajima	Sumitomo Electric Industries	Japan
Director	Anil Pande	Dura-Line	India
Director	John Domelow	Warren & Brown Technologies	Australia
Director	Jei (Jae Myung) Kim	LS Cable	Korea

Council Committees (1)

- **Membership Committee**

- To encourage the growth of membership
- To ensure a diverse cross-section of companies and individuals that represent FTTH across the Asia-Pacific region and enhances the purpose of the Council

- **Market Development Committee**

- To provide a common understanding of the customer segments and their requirements and the size of the FTTH industry and market
- To promote the markets development through promotion and communications

- **Technologies & Architecture Committee**

- To Promote the awareness and business implications of active systems, passive components and deployment techniques for FTTH networks

Council Committees (2)

- **Regulation and Policy Committee**
 - To promote and coordinate regional, geographic and governmental issues in order to facilitate the introduction and growth of FTTH in the region
- **Planning, Communication & Events Committee**
 - To plan and coordinate all general membership activities, meetings and conferences
 - To coordinate reactive and proactive public relations
 - To promote the FTTH Council as THE trusted central source for knowledge, facts, education and perspective on FTTH

Main Events of the Council

Annual Conferences

- Focus on market trend
- Members & Non-members
- Once a year (Spring or Summer)



General Meetings

- Focus on Council's issue, internal discussion
- Basically members only & some guests
- At least once a year

FTTH Council - Definition of Terms

- From the beginning of FTTH, every region had its own view what FTTH actually means.
- August 11th 2006, FTTH definitions
 - One set of definition for Global use
 - Agreed by International Advisory Group “IAG”
- January 9th 2009, definitions refreshed
 - Time and technologies evolved
 - IAG revised FTTH Definition can be found on



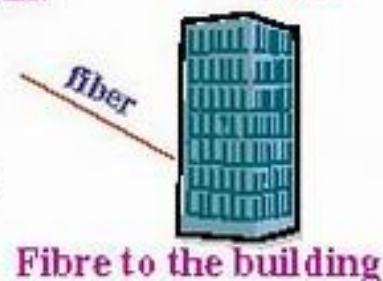
www.ftthcouncilap.org

FTTH Council - Definition of Terms

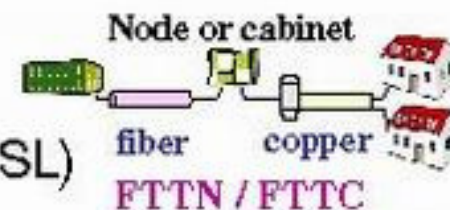
- **FTTHome** – Complete Fiber Path to Home
 - in-building cables:
 - house copper or fiber or wireless



- **FTTBilding** – Fiber to Apartment / Office Building
 - in-building cables: building copper or fiber regarded as a transitional stage to FTTH



- **FTTCurb / FTTCnode** – Fiber to Street Cabinet
 - distribution and drop cables using telco copper (DSL) or new copper
 - categorised as DSL technologies.



FTTH Council - Definition of Terms

- **Home Passed**

- The number of “**Homes Passed**” is the potential number of premises to which an operator has capability to connect in a service area

- **Homes Connected**

- The number of “**Homes Connected**” is the number of premises which are connected to an FTTH/FTTB-network.

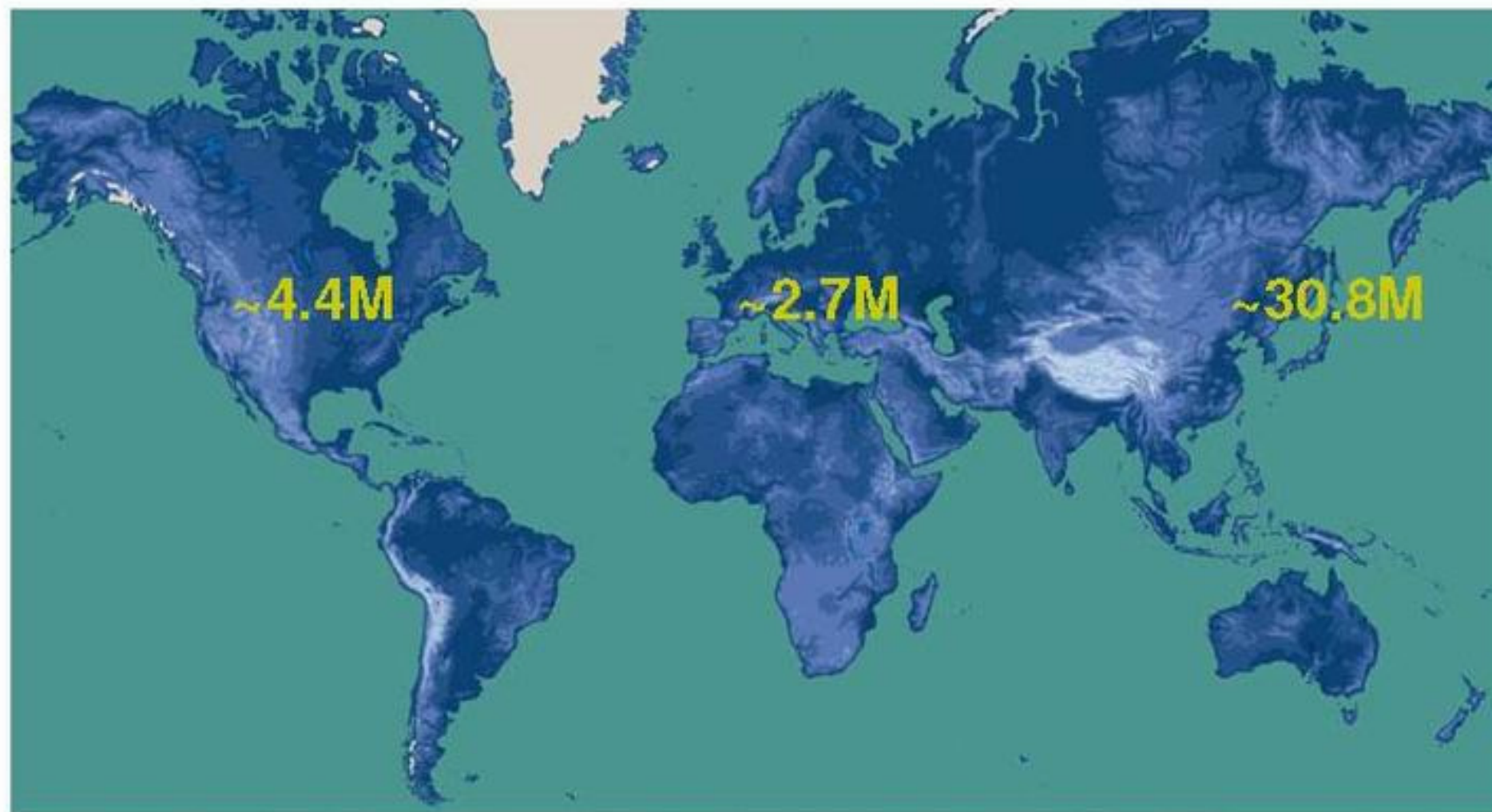
- **Premises**

- The subscriber’s home or place of business. In a multi dwelling unit each apartment is therefore counted as one premises.

- **Subscriber**

- A premises that is connected to a FTTH/B-network and uses at least one service on this connection under a commercial contract.

FTTH Subscribers Connected (May 2009)



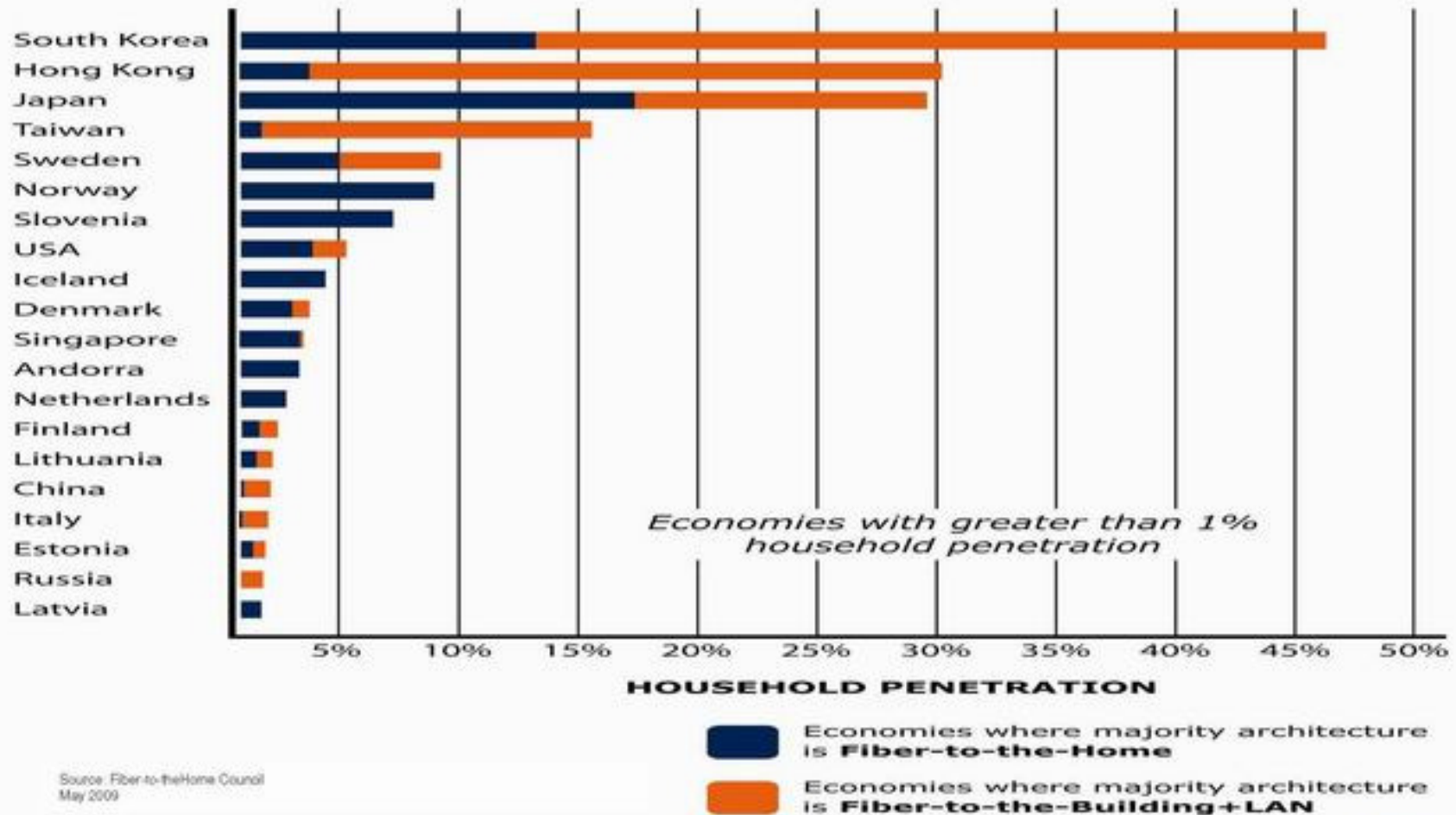
Source: NA FTTH Council/Mark Render (April 2009); FTTH Council Europe/Dan (Copenhagen Feb. 2009 + including Russia); FTTH Council AP/Mark (May 2009)

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Global FTTH Ranking (updated in May 2009)

Economies with the Highest Penetration of Fiber-to-the-Home / Building+LAN



Source: Fiber-to-theHome Council
May 2009

Asia-Pacific keeps market penetration leadership

- Top Four
 - South Korea, Hong Kong, Japan, Taiwan
- 30.8 million of world's (est.) 38 million

Interim update of Asia-Pacific region:

- FTTB represent 63% AP subscribers
 - i.e. +12% subscriber (vs. dec08)
- P.R.China highest FTTB subscribers
 - 6.2 million, surpassing Korea.
- S.Korea 45% of FTTH/B penetration
 - Hong Kong 30%, Japan ~ 30%, Taiwan 16%
- Japan overall global leader (FTTH/B)
 - 8.5 million subscribers, followed by S. Korea
- Taiwan emerged
 - Strongest FTTH growth rate since end 2008

Analysis of Regulation and Policy within Asia-Pacific

Scope

- To report on the contrasting approaches and impacts of regulation and policy on telecommunications and related industries in the twelve chosen countries of the Asia-Pacific region .

Markets can be divided into distinct categories

- **Tier 1 (well advanced FTTH/B deployment)**
 - Hong Kong, Japan and South Korea
 - strong broadband penetration with high bandwidth speeds and good FTTH/B deployment progress.
- **Tier 2 (threshold FTTH/B transition)**
 - Singapore and Taiwan
 - good broadband penetration with high bandwidth speeds, but lacking in FTTH/B deployment.
- **Tier 3 (potential FTTH/B transition)**
 - Australia, China and Malaysia
 - reasonable broadband penetration and potential for FTTH/B deployments.
- **Tier 4 (lower priority for broadband development)**
 - India, Indonesia, Thailand and Vietnam
 - struggling with broadband penetration, but the potential to still develop.

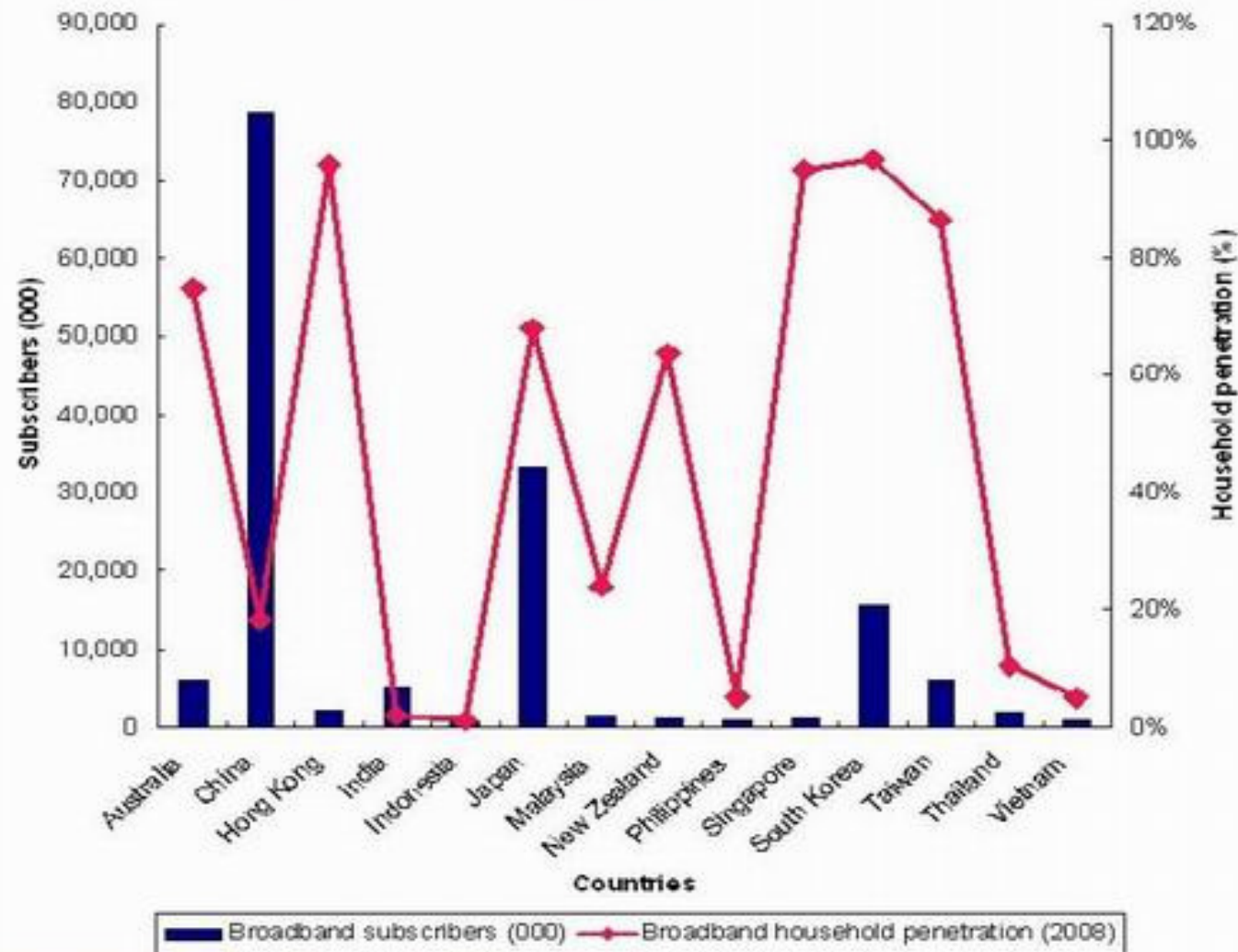
Regional differences

- There are important differences between the AP markets
 - Demography
 - Economies
 - Culture
 - Politics
 - Structure of Telecoms markets
 - The regulatory frameworks
 - History
- Unlike in Europe and North America, legislative and regulatory approaches towards the telecommunications and media industries are diverse

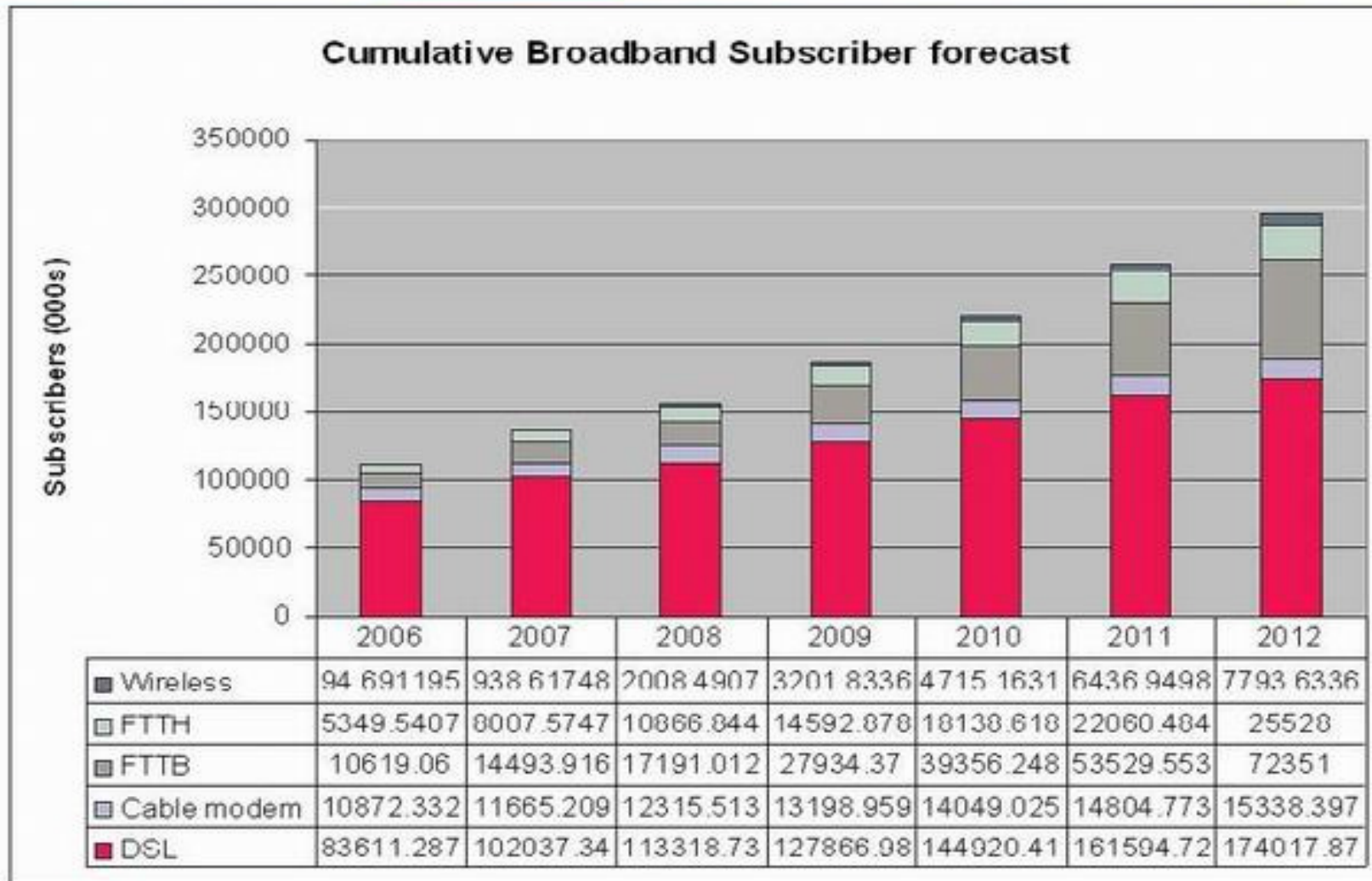
Government has a critical role to play

- Governments and regulators can substantially influence the nature and timing of FTTH/B transition
 - How open will FTTH/B be to competitive access?
 - What population coverage?
- Some governments and regulators have focussed on infrastructure competition
 - allowing the market to evolve naturally
 - (eg Hong Kong)
- Others have encouraged industry collaboration to facilitate FTTH/B
 - (eg Japan and South Korea).

Broadband subscriber and household penetration in Asia-Pacific



Asia-Pacific Cumulative Broadband Subscriber forecast



BIG Success with 4th Annual Conference May 2009!!

- Total attendee number is over 500
- Global attendance from 26 countries
- Held at Sofitel Hotel Melbourne on Collins
- 36 cutting-edge technology exhibitors
- 300+ delegates joined Gala Dinner
- 34 official sponsors, 3 associate and 1 media sponsors



4th Annual Conference in Melbourne, May 2009

- Distinguished Key Note & Plenary Speakers
Senator the Hon Stephen Conroy, Mr. Bret Swanson
MIC Japan, IDA Singapore, Greek FTTH Committee
BSNL, HKSAN, TM

- FTTH Global Ranking

- New Sessions :
Government & Regulation
Tutorial

- Technical Site Visit at Sandhurst
Hosted by PBN

- Networking
Cocktail Parties at Exhibition Areas
Gala Dinner



Next Annual Conference

■ **5th Annual Conference in Seoul, on May 2010**

Conference Chair : Dr. ED Park w LS-Cable



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FIBER-TO-THE HOME COUNCIL ASIA PACIFIC

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Thank you !

