



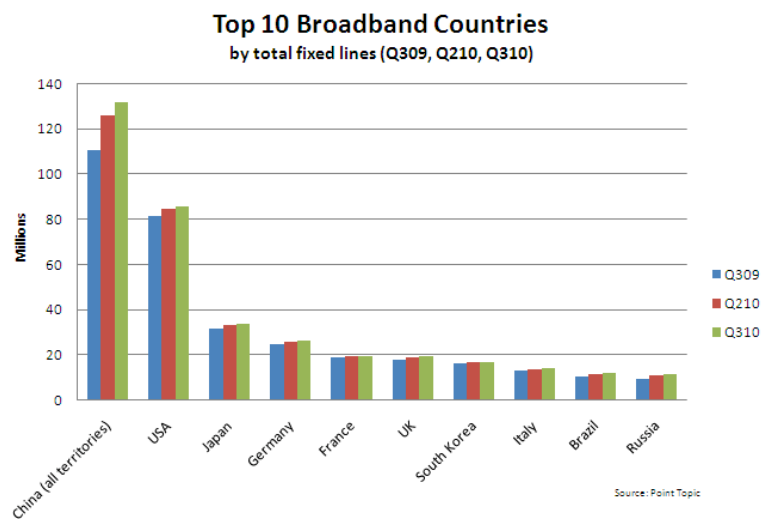
## BROADBAND SUBSCRIPTION REACHED 509 MILLION LINES WORLDWIDE AS IPTV PASSES 40 MILLION SUBSCRIBER MILESTONE

*China and India report second best quarters ever and  
developing broadband markets show over 20% growth 3Q2010*

January 06, 2011, Atlanta - Year on year growth rates of 6.7% have taken broadband subscription to 508,761,837 in the third quarter of 2010, according to figures prepared by Point Topic (<http://www.point-topic.com>) and announced today by the Broadband Forum in its Global Broadband and IPTV Industry Update. Over 14.3 million lines were added in the third quarter alone, representing 2.88% growth over the previous quarter.

Whilst the first three quarters of 2010 have generally been characterized by uneven growth patterns, some countries stand out with exceptional growth - with China and India both reporting their second best ever quarters in Q3. Vigorous growth was generally concentrated in developing broadband markets, with India, Russia, Vietnam, Ukraine and the Philippines all growing by more than 20% in the last 12 months.

Robin Mersh, Chief Executive Officer of the Broadband Forum, said, "The patterns of growth are shifting as some markets reach saturation and emerging markets show remarkable growth rates over this year. In more and more countries we are seeing more than 80% availability and huge take up of broadband. The Broadband Forum celebrates this major achievement and continues to work towards empowering new applications and developing enhanced deployment and management solutions to support the broadband and IPTV industries."



The new figures show that China and the US continue to add more lines than any other single market. Russia and Brazil, however, are the most rapidly growing in percentage terms with 22% and 14% respectively. Asia continues to increase its share of the total broadband lines in the world, adding more than double the number of broadband lines per quarter than any other region.

## **Regional Growth**

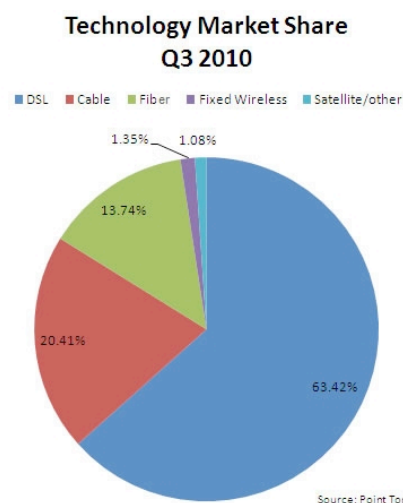
In Asia, more and more of the developing markets are starting to report significant growth in broadband, with China, India, the Philippines, Vietnam and even continued growth in South Korea all pointing to increased dominance in the global market.

In Europe the biggest gains are in Eastern Europe, although the region as a whole has performed better in 2010 than in 2009 on a quarter by quarter basis with most of the big markets showing improvement. With these strong numbers coming from Eastern Europe, there is optimism that 2011 will continue a strong growth trend for the region as a whole.

In the Americas, we see renewed pickup, although it's too early to say if this is the start of a full blown recovery. In Canada especially there is little head room for further growth as household penetration nears 90%. In South America, Brazil and Mexico continuing to offer robust numbers while growth is slow in some of their South and Central American neighbors.

The Middle East and Africa region also shows steady growth rather than spectacular numbers. While growth is strong in Egypt, Turkey and South Africa, there are still impediments to adoption (mostly availability and cost) in much of Africa. Once these are overcome we should see mass adoption become a reality.

## **Technology Overview**



Source: Data provided by Point Topic ([www.point-topic.com](http://www.point-topic.com))

DSL remains the dominant broadband technology worldwide. DSL is growing most rapidly in Asia, driven by the relatively low up front costs and availability over other technologies.

Fiber continues to grow its strong market share and for the first time we are seeing notable growth in fixed wireless technologies.

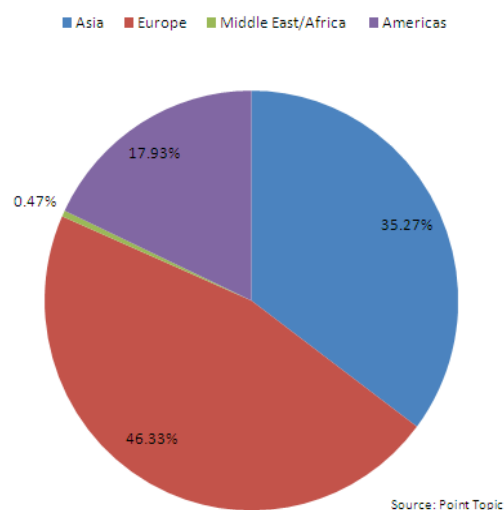
“As demand for broadband increases worldwide there is now a significant amount of ‘infill’ taking place. Many areas don’t have access to the infrastructure required for fixed line broadband provision. There has been an increase in access via technologies that don’t require wire of some description all the way to the consumer,” says Oliver Johnson, CEO of Point Topic.

## IPTV Growth

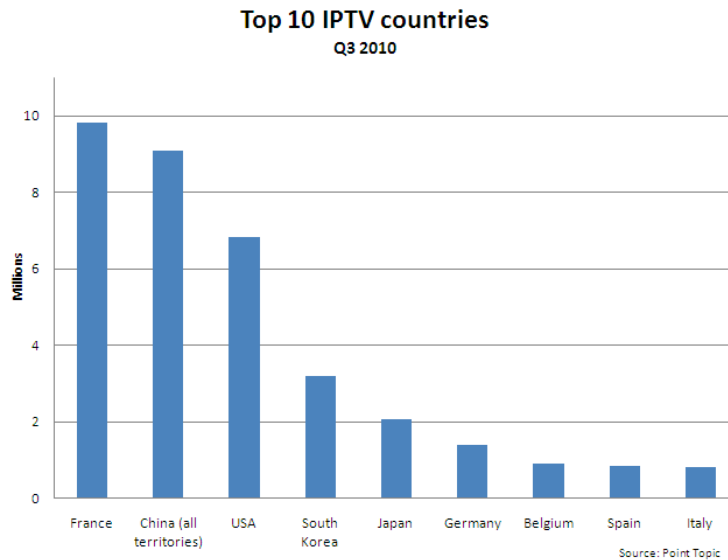
The total number of IPTV subscribers worldwide now stands at 41.9 million (41,892,171), representing a growth of 7.3% (2.846 million net adds in the quarter) in the three months to end September and 36.7% growth in the last 12 months (11.256 million net adds).

“IPTV has grown solidly in the last 12 months. Perhaps more importantly the number of markets and operators offering IPTV is increasing as high speed broadband spreads around the world,” says John Bosnell, Senior Analyst at Point Topic. “With TV being increasingly routed over IP networks, the broadband connection is becoming an increasingly significant channel for video delivery. As a tool for customer retention, as a prime mechanism for increasing ARPU, and as a means of providing a distinctive offering to the competition, the bundling of IPTV with a broadband subscription and voice is very attractive to ISPs.”

**IPTV subscribers market share**  
Q3 2010



With 46% market share, Europe continues as the leading IPTV region. But China is fast catching up to France, the current world leader in terms of IPTV subscribers, and at current growth rates China will overtake France sometime during 2011. With this growth, Asia is rapidly closing the gap.



### ***Broadband Forum focus for 2011***

To continue to support the scale of subscriber growth, both in terms of the number of lines and the speed of bandwidth, the industry needs the most efficient network management possible, so that service providers can keep pace with opportunities such as fixed mobile convergence, the rise in business broadband, Smart Grid and the fully Connected Home. In all the excitement about new services, applications and higher bandwidth provision, it is the network that must deliver and this is a key area of work at the Broadband Forum.

Ongoing work is also focused on defining the evolving end-to-end architecture, ensuring it can support multiple services with quality of service including multi cast. As part of our end-to-end approach, the Forum is defining MPLS core specifications as well as access aggregation and local loop solutions (DSL, fiber, etc.), and our Connected Home initiatives, built around TR-069, provide the essential remote management standard for the industry.

For further information about the Broadband Forum or to access the latest free white papers and technical reports, visit [www.broadband-forum.org](http://www.broadband-forum.org).

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**About the Broadband Forum**

Broadband Forum, a non-profit industry organization, is focused on engineering smarter and faster broadband connections. Our work defines best practices for global networks, enables service and content delivery, establishes technology migration strategies, engineers critical device & service management tools, and is key to redefining broadband. Our technical reports and free white papers can be found at [www.broadband-forum.org](http://www.broadband-forum.org).