



Building Fiber-to-the-Home Communities Together

FTTH Progress In North America

April 2, 2013

***RVA* LLC**
Market Research & Consulting

**Building Fiber-to-the-Home
Communities Together**





RVA FTTH Research Methodology

North America (USA, Canada, Caribbean, Mexico)*



Over **350** Provider Interviews:
During the past six months

*Mexico stats from IDATE / trends estimated RVA

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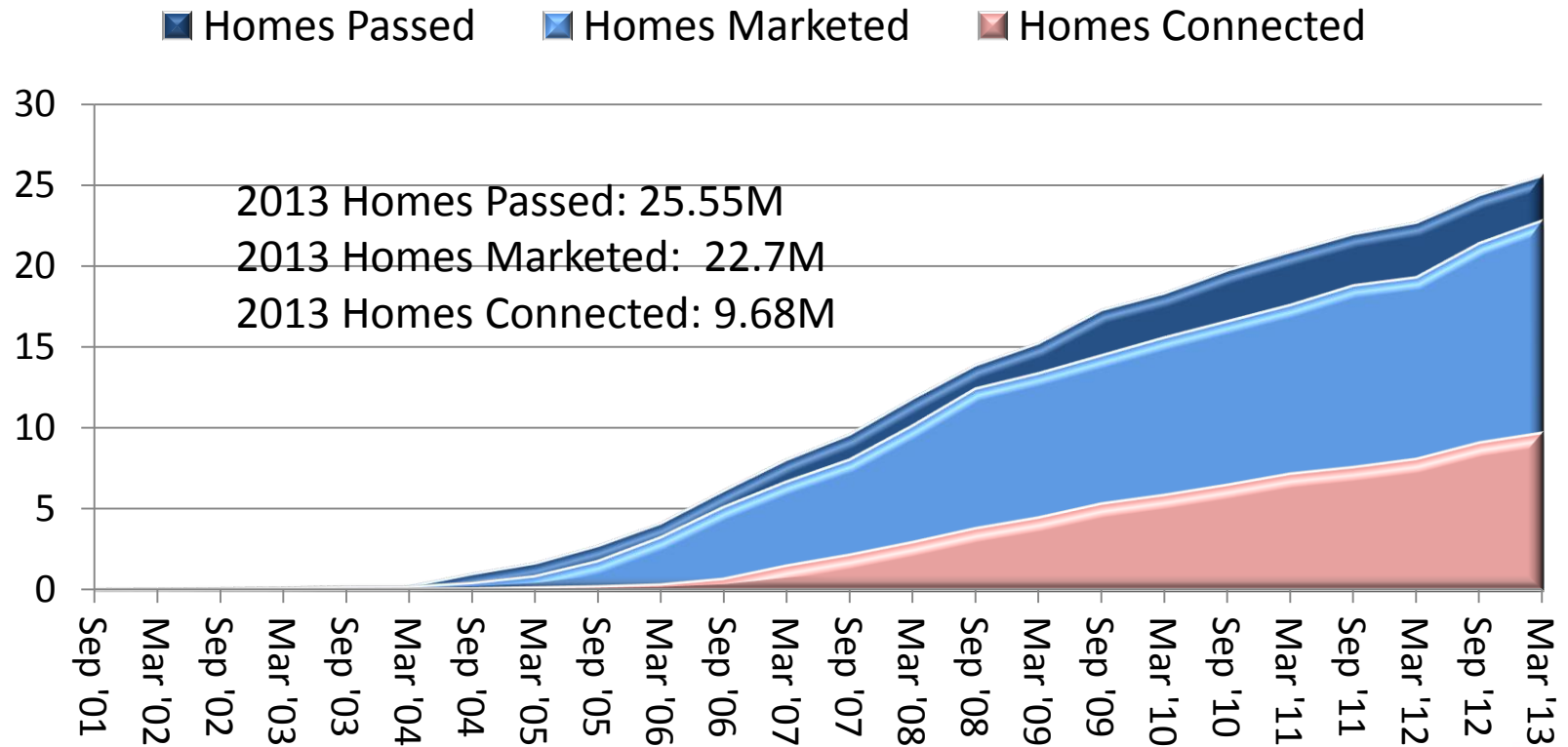
FTTH Progress

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North American FTTH Connections

Connections Are Nearing 10 Million



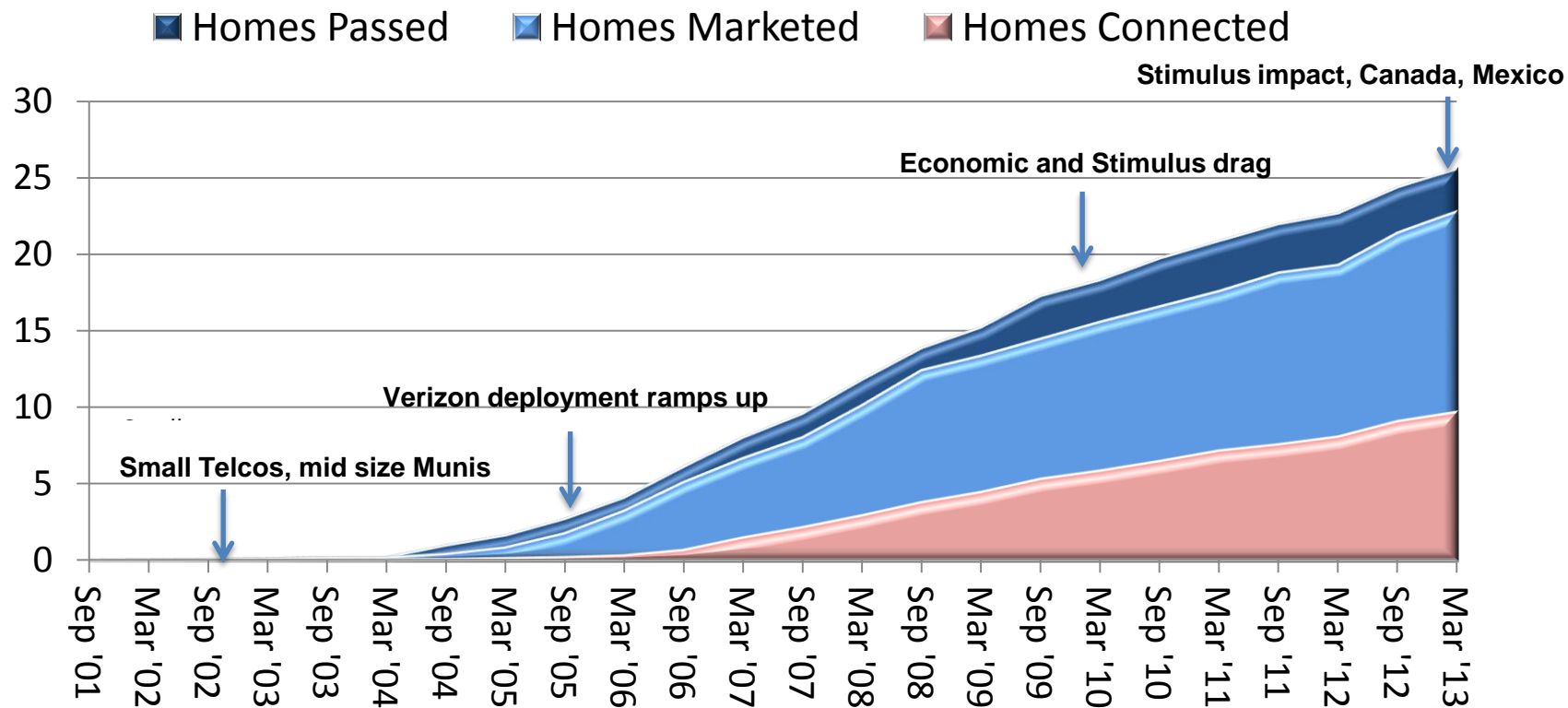
Homes passed = Homes that could be served / includes builds in progress etc.
 Home marketed = Homes actively marketed with FTTH

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North American FTTH Connections

Homes Marketed Nears 23 Million



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FTTH Greenfield Is Increasing



FTTH Providers report increasing greenfield activity as housing starts increase and old copper based developments are finally filling up – replaced by fiber developments.

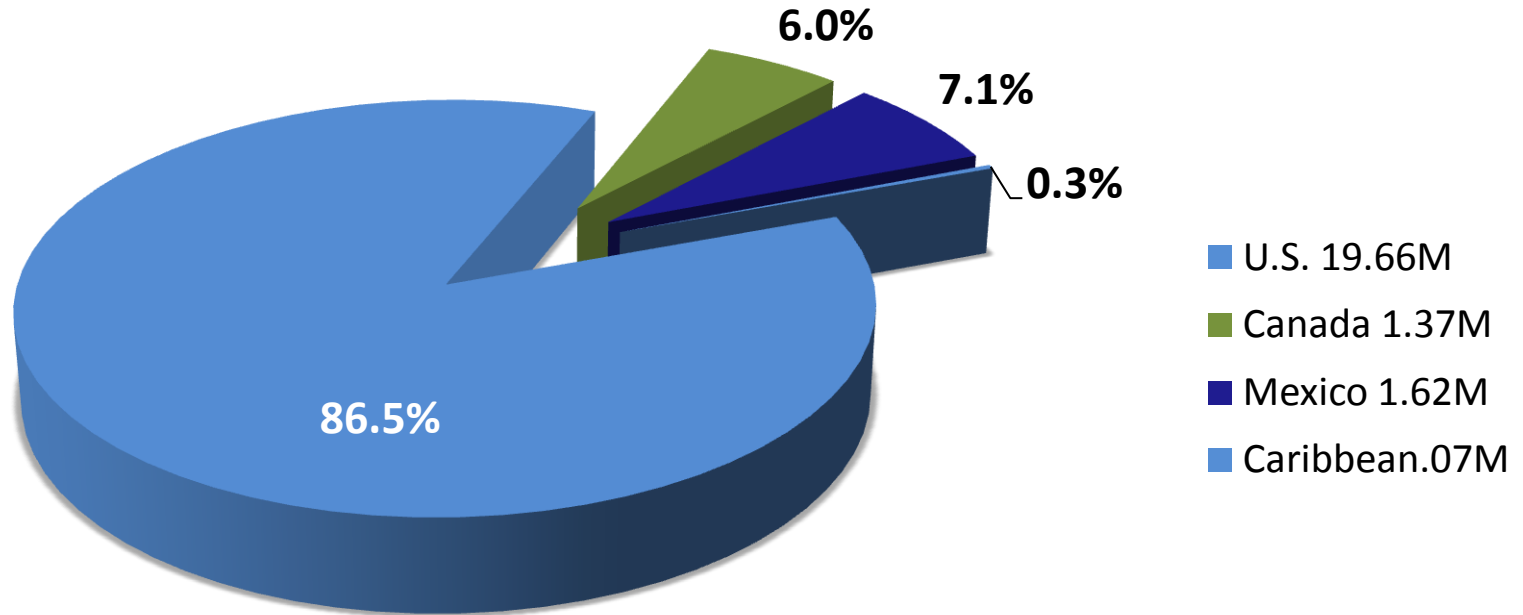
Greenfield FTTH is up about 20% YTD..

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Other Countries In North America Are Now Expanding

The U.S. Represents 86.5% Of NA Homes Marketed

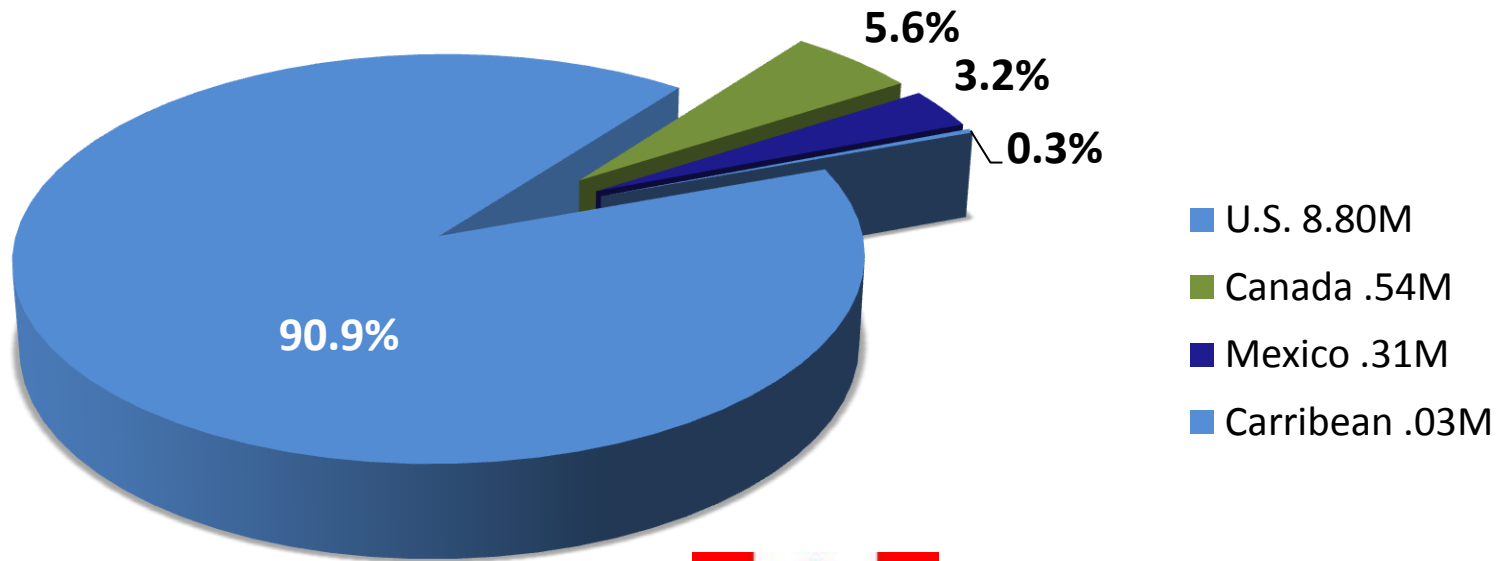


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Other Countries In North America Are Now Expanding

The U.S. Represents 92% Of NA Homes Connected



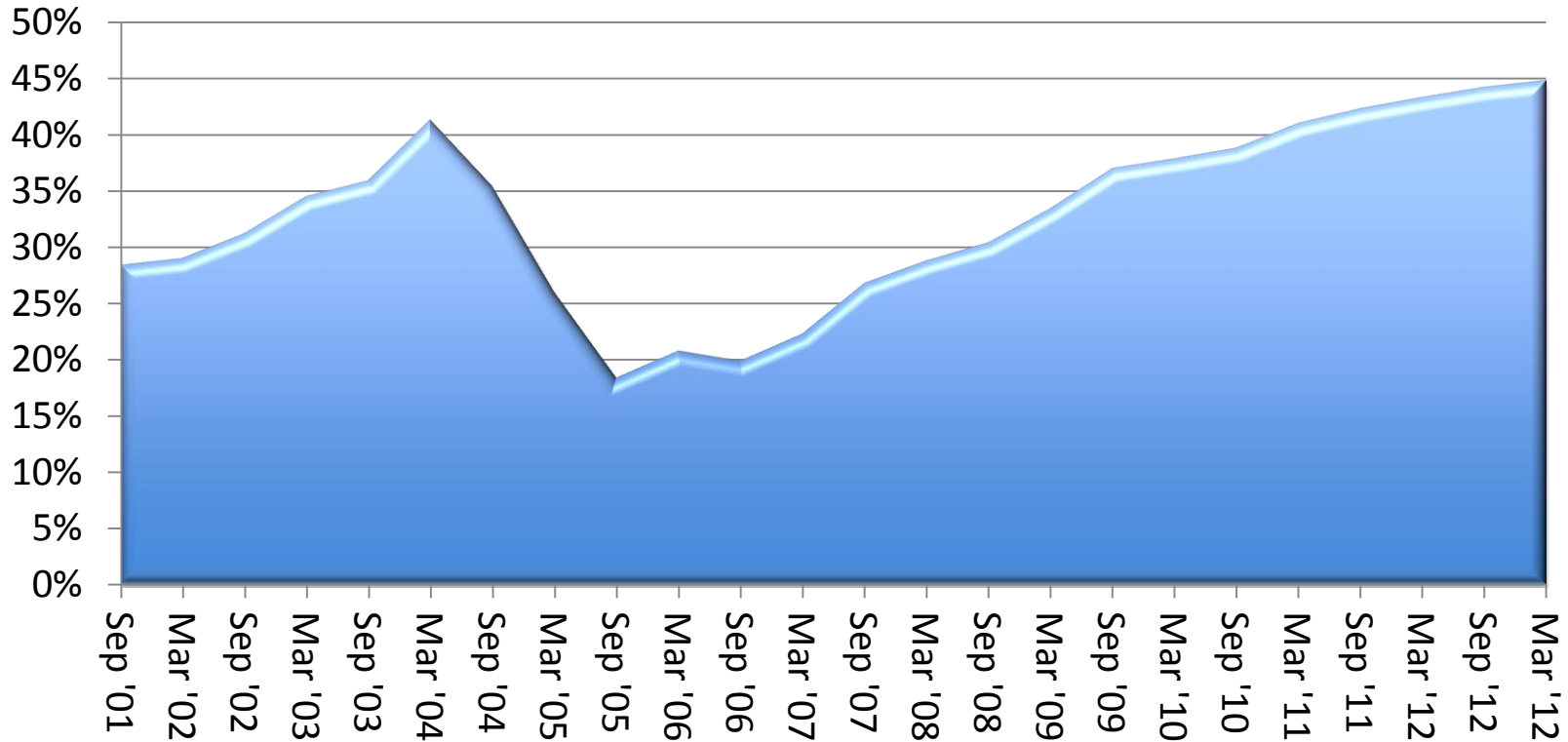
Canada now exceeds one half million connections and currently has the fastest rate of growth in North America

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U.S. FTTH Take-Rates Hit New Record

U.S. Take-Rates Reach 44.8%

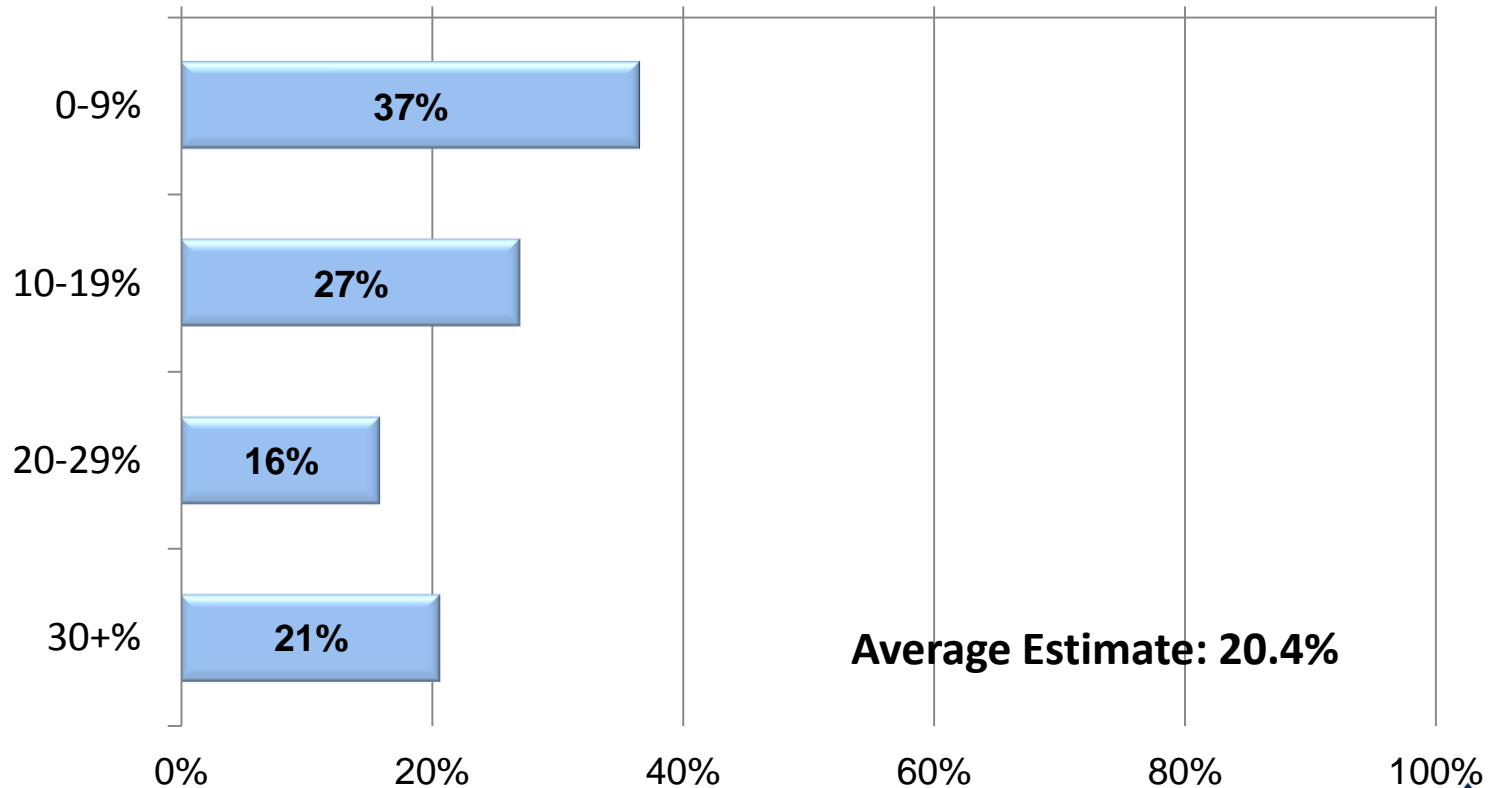


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FTTH Reduces Operations Costs

Estimated Opex Savings among Those with Active FTTH Customers



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