World Broadband Statistics: Q1 2008

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Figures

Tables

1. Introduction

This report continues the series of Point Topic's quarterly *World Broadband Statistics* publications. The series originated as several DSL reports, first published in Q2 2002, which were eventually expanded to include cable modem and other technologies in Q2 2003.

Other technologies covered include optical fibre and different forms of broadband Internet such as, for example, Fixed Wireless Access (FWA), Satellite and Powerline. Fibre in this context means anything from Fibre-to-the-kerb to Fibre-to-the-home and is often generalised as "FTTx."

Mobile broadband is undoubtedly taking off in many countries where 3G or WiFi/WiMAX networks are used as an alternative or complementary to fixed-line broadband access. To address the importance of this new development, Point Topic embarked on a special wireless broadband project in Q3 2006 with the aim of including more comprehensive coverage of wireless subscriber numbers in our quarterly broadband statistics report. Throughout this data collation process, we found that the figures are still very much restricted to certain geographical regions. Consequently, it remains too early for wireless subscriber data to be examined in depth within the world broadband statistics analysis. However, as far as available, WiFi and WiMAX broadband subscriber data is being entered into GBS and clients to this Point Topic service are welcome to conduct their own in-depth analysis.

For Q4 2007, GBS country coverage has been extended to 112 countries and well over 440 operators.

This report begins with an examination of the growth in broadband subscribers for Q1 2008 at both a global and a regional level. The next section of the report addresses technology trends and choices, looking firstly at general trends in uptake followed by an analysis of regional market shares in a variety of broadband technologies.

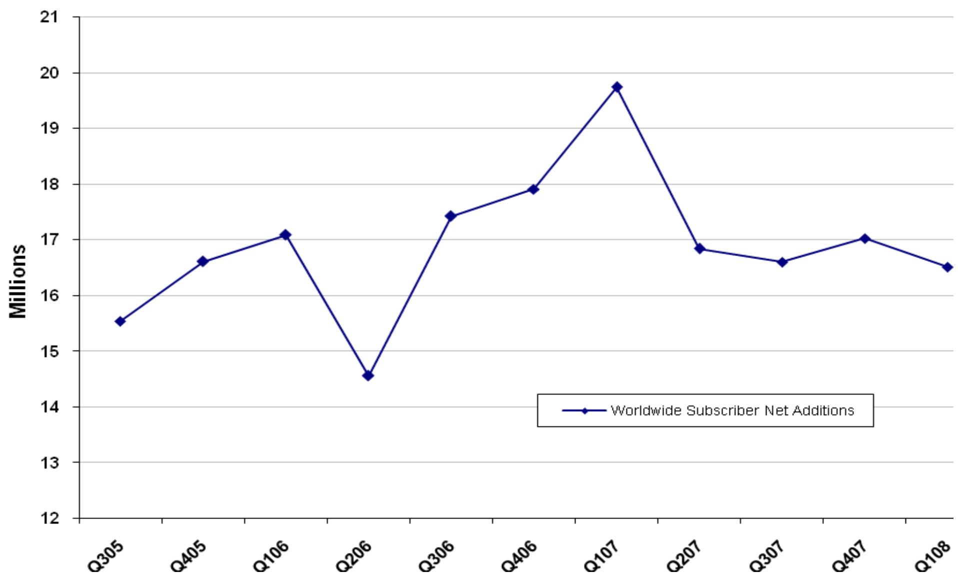
The focus of the report then shifts to the "top ten" broadband countries for Q1 2008. Here we examine the total number of broadband subscribers, the net additions for the quarter, quarterly and annual percentage growth, technologies adopted as well as population and household penetration. The last section of the report offers a selection of tables highlighting both, quarterly and annual changes in total broadband, DSL and Non-DSL subscriber figures.

2. Global and Regional Perspectives

2.1 Overall Growth

There were 367.7 million broadband subscribers globally by the end of Q1 2008. This was a 4.7 per cent increase on the total reported at the end of 2007 when there were 351.12 million subscribers, and represents 16.59 net additions worldwide. Figure 1 shows the total number of broadband subscribers added quarterly from Q2 2005 to Q1 2008. According to figure 1, the number of net additions in Q1 2008 was the lowest since Q2 2006 when 14.53 million new broadband subscribers were added.

Figure 1: World Broadband Subscriber Net Additions (Q3 2005-Q1 2008)



Since the highest number over the last two years recorded in Q1 2007, quarterly net additions have remained steady totalling 16.8 million in Q207, 16.6 in Q307 and 17.02 million in Q407. Q108 had the lowest since Q2 2006, but this represents a 3 per cent fall from Q4 2007 and a 0.5 per cent fall from Q3 2007.

Over the 12 months to end Q1 2008, almost 67 million new broadband subscribers were added worldwide, representing 18 per cent of the total at the end of Q1 2008. Worldwide broadband population penetration was 6.4 per cent at the same time, up 23.1 per cent on year-on-year from 5.2 per cent. Quarterly growth of population penetration stood at 4.9 per cent from 6.1 per cent in Q4 2007.

2.2 Regional Trends

Figure 2 shows the distribution of the world's broadband subscribers and figure 3 shows population penetration and quarterly growth by region in Q1 2008. Western Europe continues to have the largest share of broadband subscribers at 26.55 per cent while North America has is in second place 23.01 per cent of the total. South and East Asia is in third place (21.32 per cent) followed by Asia Pacific (16.05 per cent). The three regions with the smallest market shares are Latin America (5.5 per cent), Eastern Europe with 4.8 per cent and Middle East and Africa (2.8 per cent).

Figure 2: Share of World Broadband Subscribers by Region in Q1 2008

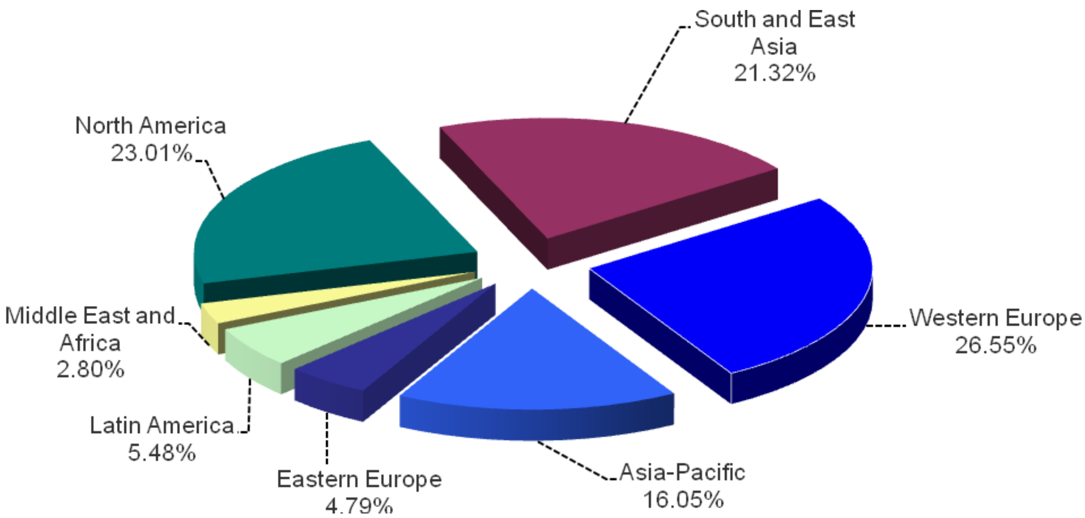
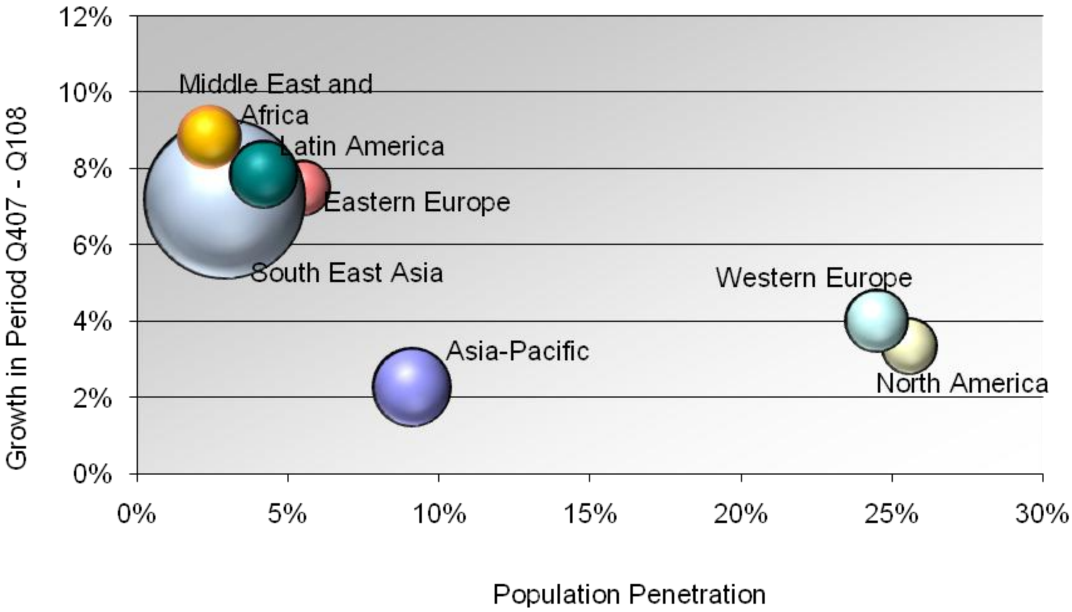


Figure 3: Penetration & Quarterly Growth by Region in Q1 2008



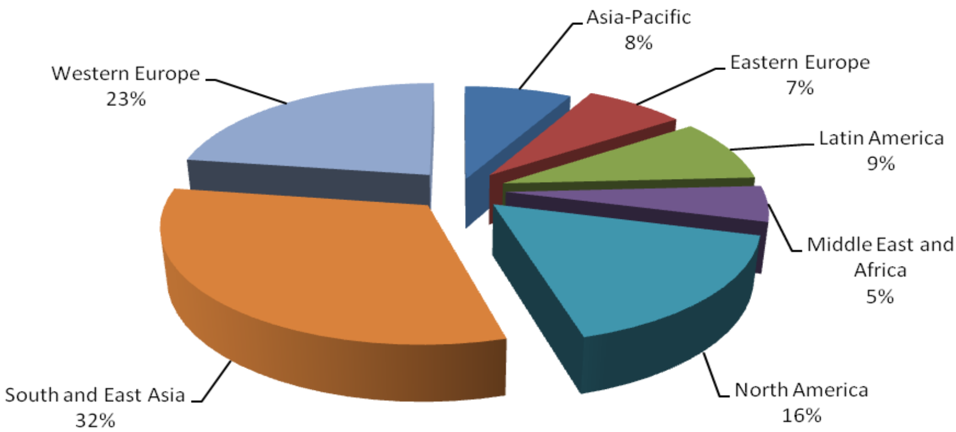
Western Europe and North America have the highest population penetration rates at 24.5 and 25.6 per cent respectively in Q1 2008, followed by Asia Pacific with 9.1 per cent. Eastern Europe and Latin America have similar population penetration rates at 5.5 per cent and 4.2 per cent respectively, followed by South East Asia (2.9 per cent) and Middle East and Africa (2.4 per cent). These are shown in figure 3.

The population of South East Asia surpasses that of other regions, as shown by the size of its globe in figure 3 compared to the others. This is not surprising since this region includes countries like China and India – which both have populations which exceed 1 billion. Despite this, its penetration is still relatively small, indicating the potential for growth in this region.

Growth from Q4 2007 to Q1 2008 was positive in all regions, but in four out of the seven, quarterly growth was down on that from Q3 – Q4 2007. These regions were Eastern Europe (down 2.73 per cent to 7.48 per cent), North America (down 1.27 per cent to 3.34 per cent), Western Europe (down 0.75 per cent to 4 per cent) and Latin America (down 0.52 per cent to 7.85 per cent).

Of the remaining three regions, two improved their quarterly growth and one remained unchanged. Growth in Middle East and Africa was up 1 per cent from 7.81 to 8.81 per cent and in South and East Asia it was up 1.7 per cent from 6.12 to 7.19 per cent. Quarterly growth in Asia Pacific remained unchanged at 2.27 per cent.

Figure 4: Regional Share of World Broadband Net Additions in Q1 2008



For the first time in the last three quarters the Middle East and Africa overtook Eastern Europe with the highest quarterly growth rate at 8.81 per cent. As shown in figure 4, the number of new broadband subscribers added in this region was the lowest overall, totalling 0.83 million or 5 per cent of worldwide quarterly net additions. The main countries that contributed to this net addition were Turkey with 476,532 new subscribers and Saudi Arabia with 125,000 new subscribers.

Latin America had the second highest quarterly growth rate at 7.85 per cent. Net additions totalled 1.47 million representing 9 per cent, placing Latin America in the middle in terms of net additions ranking. The countries that added the most new subscribers in Latin America include Brazil (471,600), Mexico (433,174), Colombia (211,141) and Argentina (173,100). Collectively they added 1.29 million new subscribers (7.8 per cent of the total).

Eastern Europe experienced the third highest quarterly growth at 7.48 per cent. Net additions in this region totalled 1.23 million or 7 per cent of the global total. As a result, Eastern Europe added the second lowest number of new broadband subscribers after the Middle East and Africa. The countries that added the most subscribers include Russia (387,825), Romania (212,700) and Poland (179,299). Net additions in all three countries were considerably down on the previous quarter (Q4 2007) by 24 per cent, 20 per cent and 23 per cent respectively.

Growth in South and East Asia was 1 per cent higher during Q1 2008 at 7.19 per cent. While this region was in fourth place in terms of quarterly growth, it had the highest number of net additions for the quarter totalling 5.26 million (representing 32 per cent of the total). The main contributing country was China, which added over 4.47 million new subscribers in Q1 2008. This was the highest number of new subscribers since Q1 2007 when over 4.48 new subscribers were added.

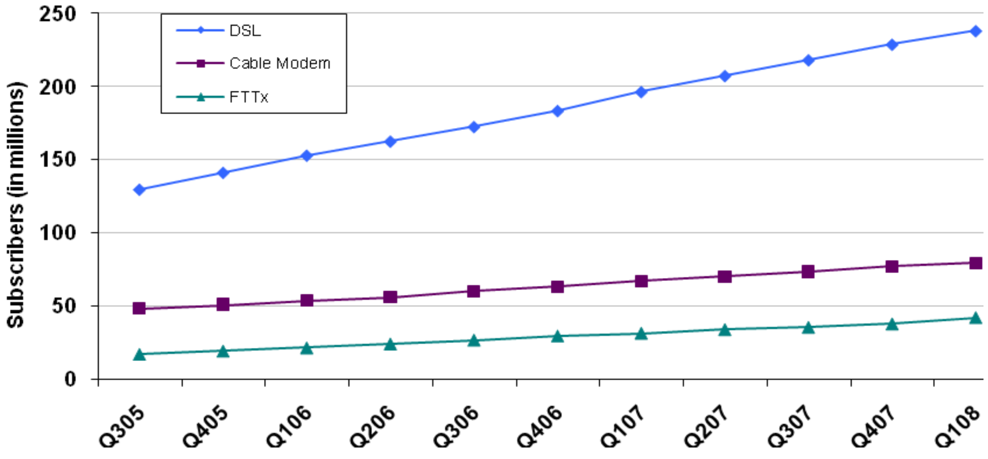
Western Europe had the third lowest quarterly growth at 4 per cent. Net additions at 3.76 million were the second highest overall, representing 23 per cent of the total. The countries that added the most new subscribers during the quarter were Germany (1,182,834), France (616,928) and the UK (589,400). Net additions in all three countries were down on the previous quarter by 3.7 per cent, 13 per cent and 4 per cent respectively.

Quarterly growth in North America was the second lowest at 3.34 per cent, but net additions were the third highest for Q1 2008 at 2.7 million (16.5 per cent of total net additions) after South and East Asia and Western Europe. This was the lowest number of reported net additions in this region since Q2 2006 when 2.27 million new subscribers were added. The top four contributing operators were all US-based and include Comcast, which added 492,000 new subscribers, followed by AT&T (491,000), Time Warner Cable (304,000) and Verizon (266,000). Of these four, only Comcast added less new subscribers quarter-on-quarter, from 698,000 in Q4 2007 (a 30 per cent fall).

Asia Pacific had the lowest quarterly growth at 2.27 per cent while net additions totalled 1.31 million. As a result, Asia Pacific added the third lowest number of new subscribers after the Middle East and Africa and Eastern Europe. Net additions were 2.2 per cent up on the previous quarter from 1.28 million and the main contributing countries included Japan (400,400), Australia (345,000), South Korea (159,372) and Malaysia (135,000).

3. Technology Trends and Choices

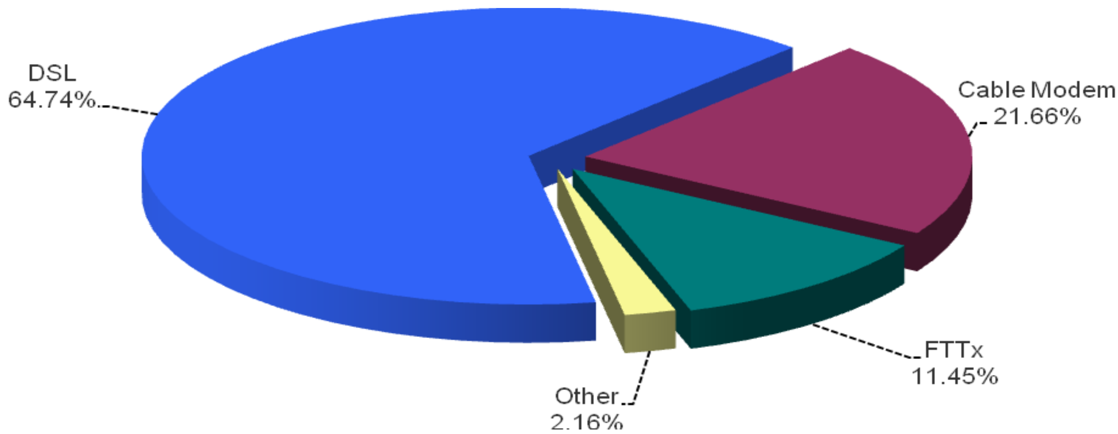
Figure 5: Technology Trends in Q1 2008



The popularity of DSL, FTTx and cable modem technologies for broadband connections worldwide are shown in figures 5 and 6. The use of all three technologies continued to increase throughout Q1 2008 with DSL being the most common, used by almost 65 per cent of the broadband community (238 million). This was up 4.06 per cent on the previous quarter when DSL subscribers totalled 229 million.

Cable modems were used by 21.66 per cent of the total (79.6 million) up 3.3 per cent on the previous quarter from 77.1 million, while FTTx showed the greatest improvement, up 11.45 per cent from 7.4 million to 7.93 million.

Figure 6: Total Broadband by Technology in Q1 2008



FTTx subscribers showed the largest increase in quarterly growth, up 70 per cent from 6.58 per cent in Q4 2007 to 11.19 per cent in Q1 2008. This was also the highest quarterly growth of the FTTx subscriber base since Q206 when it was 12.48 per cent. DSL subscribers grew by the next highest rate at 4.06 per cent, but this was down 17 per cent from an increase of 4.89 in the previous quarter and was the lowest growth over the last 2 years.

The cable modem subscriber base grew by the lowest rate of the three at 3.3 per cent, representing a 27 per cent fall in growth rate from Q4 2007 when it was 4.53 per cent. This is also the lowest rate of growth over the last two years, the second lowest being in Q2 2006 when quarterly growth was 3.62 per cent.

The market shares of DSL, cable modem and FTTx technologies by region are shown in figure 7. Over one third (34.3 per cent) of DSL subscribers resided in Western Europe in Q1 2008, amounting to 81.6 million subscribers or 83.5 per cent of the regional total. South and East Asia had the second largest market share at 25.15 per cent representing 59.8 million subscribers or 76 per cent of the regional total.

North America and Asia Pacific both had market shares of 14.59 per cent and 12.26 per cent respectively in Q1 2008. In terms of subscribers this amounted to 34.7 million (41 per cent of the North American total) and 29 million (49.46 per cent of the Asia Pacific total) respectively.

North America continues to dominate the cable modem market with 45 million subscribers in the region using this technology. This represents a 56.3 per cent market share and 53 per cent of North American broadband users. Cable modem is the second most popular technology in Western Europe after DSL with 17.46 per cent of all cable modem subscribers originating in Western Europe (13.9 million subscribers). Asia Pacific follows with a 13.41 per cent share of the cable modem market amounting to 10.7 million subscribers or 18.09 per cent of the regional total.

Over 80 per cent of subscribers that use FTTx technology for their broadband connections are based in Asia. Collectively they amount to over 35 million subscribers. The main countries that have invested in this type of technology are China with 16.7 million subscribers (40 per cent of total FTTx subscribers), Japan with 12.12 million subscribers (29 per cent) and South Korea with 5.4 million subscribers (13 per cent).

Asia Pacific was the only region to exhibit negative growth with respect to its DSL subscriber base in Q1 2008, this continues a downward trend started in Q1 2007 when it reported 29.8 subscribers. Since then its subscribers have dropped 2 per cent year-on-year to 29.2 million subscribers. The highest growth took place in the Middle East and Africa at 9.44 per cent from 8.4 million in Q4 2007 to 9.3 million in Q1 2008. This was followed by Eastern Europe, which increased its DSL subscriber base by 9.01 per cent from 8.35 million to 9.1 million and Latin America which experienced 8.32 per cent growth over the quarter from 13.2 million to 14.3 million.

Cable modem subscribers in South and East Asia fell by 1.59 per cent from 1.02 million in Q4 2007 to 1 million in Q1 2008, continuing the gradual reduction in this subscriber base from Q4 2006 when it peaked at 1.34 million. Over the last year and 3 months the number of cable modem subscribers has fallen by 25 per cent. The highest quarterly growth was experienced in Latin America, where cable modem subscribers increased by 6.91 per cent from 4.6 million in Q4 2007 to 4.9

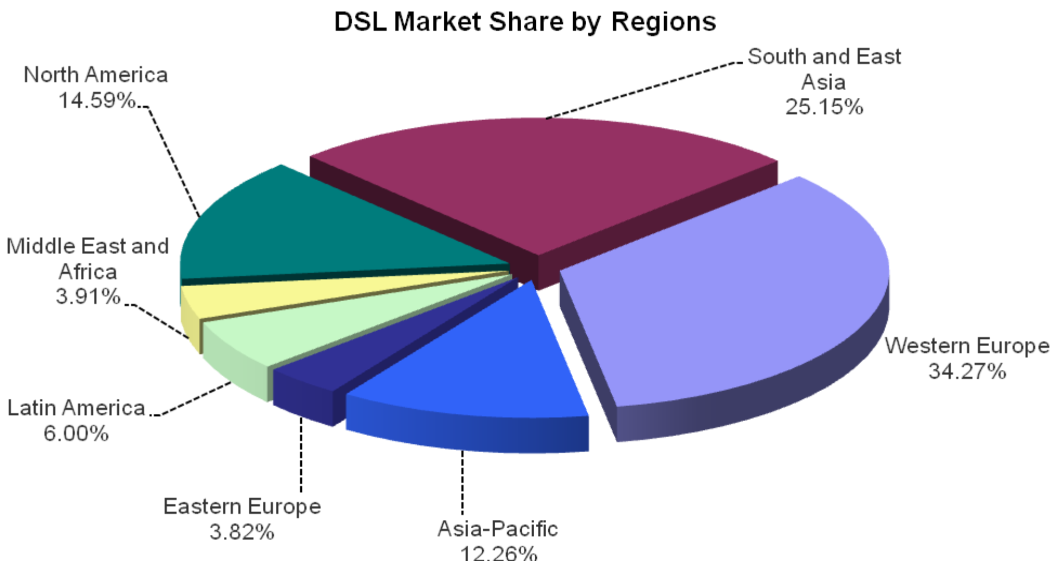
million in Q1 2008. Eastern Europe reported the second highest growth at 5.9 per cent from 3.34 million to 3.5 million while North America, Middle East and Africa and Western Europe all had similar growth rates at 3.48, 3.28 and 3.22 per cent respectively.

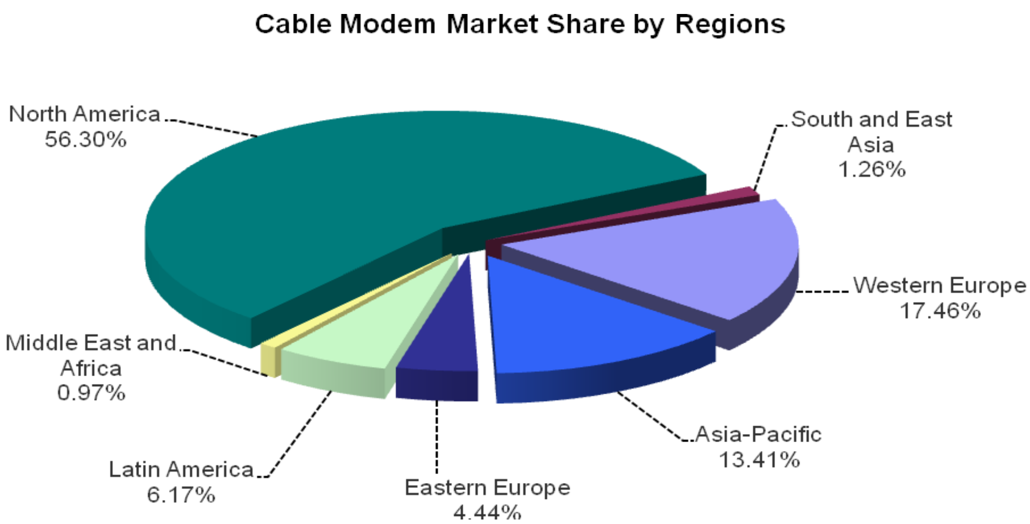
All regions which adopt FTTx technology experienced positive growth over Q1 2008. The highest growth was experienced by Latin America at 66.8 per cent. This was due the launch of FTTx services in Q3 2007 in Colombia, and according to the regulator CRT, subscription to this new service grew from 6,295 subscribers in Q4 2007 to 10,500 subscribers in Q1 2008.

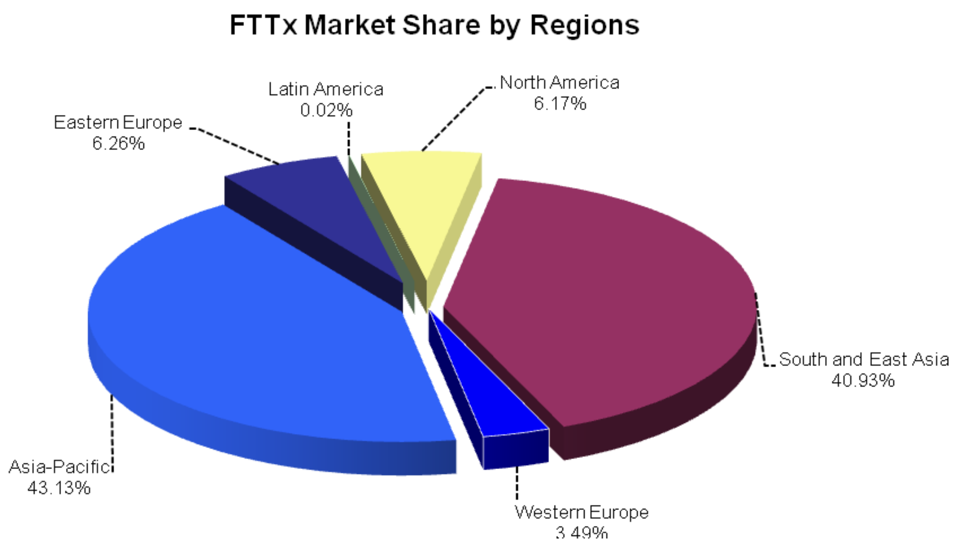
South and East Asia reported the second highest growth at 16.92 per cent. Two operators are responsible for this growth rate, namely China Telecom and China Netcom. China Telecom increased its FTTx subscribers over the last quarter by 12.29 per cent (from 10.1 million in Q4 2007 to 11.3 million in Q1 2008) while quarterly growth of China Netcom's FTTx subscribers was 34.52 per cent (from 3.7 million to 5 million).

North America had the third highest quarterly growth at 13.22 per cent followed by Asia Pacific (7.44 per cent), Eastern Europe (4.81 per cent) and Western Europe (4 per cent).

Figure 7: World DSL, Cable Modem & FTTx Market Share by Region in Q1 2008







4. "Top Ten" Broadband Countries

4.1 Number of Subscribers

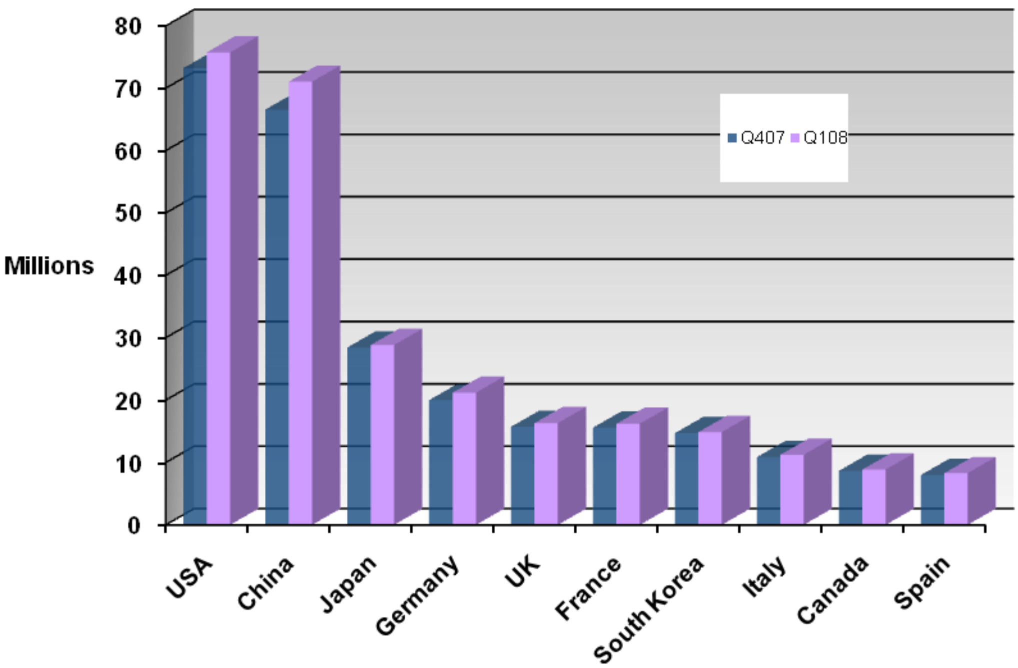
The 'top ten' countries in the world in terms of total broadband subscribers reported in Q4 2007 and Q1 2008 are shown in figure 8. The ranking over the last three quarters remains constant.

The country with the highest number of broadband subscribers is the USA with over 75.7 million of them reported in Q1 2008, this was up 3.46 per cent on the previous quarter when it had 73.2 million. China is in second place, breaking through the 70 million barrier with just over 71 million subscribers, up 6.72 per cent on Q4 2007 from 66.5 million subscribers.

The difference between the subscriber bases of both countries was 4.71 million, down 27.5 per cent on Q4 2007 when it was 6.5 million. This difference has fallen every quarter over the last three years, and the only other time this fall was over 20 per cent was in Q2 2006, when the difference fell from 7.7 million to 5.9 million (22.74 per cent).

Of the countries shown in figure 8, China had the highest quarterly growth, followed by Germany with a 5.91 per cent quarterly growth rate. Its subscriber base grew from 20 million to 21.18 million putting it in fourth place after the USA, China and Japan.

Figure 8: Total Number of Subscribers in Q4 2007 and Q1 2008



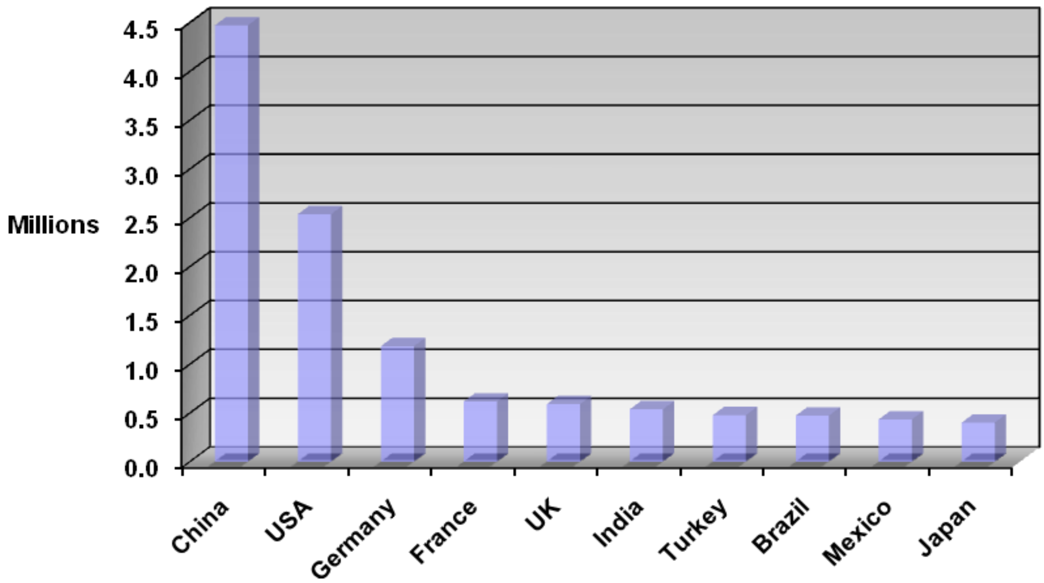
4.2 Broadband Subscribers Added

The "top ten" ranked countries in terms of total broadband subscribers added in Q1 2008 is shown in figure 9. China added the most new subscribers totalling 4.47 million, up over 27 per cent on the previous quarter when 3.5 million new subscribers were added. USA was in second place adding 2.53 million subscribers, down almost 25 per cent on the previous quarter from 3.37 million.

Germany added the third highest number of new subscribers during the same quarter and is the only other country to add more than 1 million subscribers with 1.18 million net additions. China, USA and Germany's net additions combined represent 49 per cent of total net additions in Q1 2008.

Out of the ten countries shown in figure 9, five experienced a reduction in their net additions from Q4 2007 to Q1 2008. As well as the USA and Germany they were France (12.97 per cent or 91,939 less), the UK (3.98 per cent or 24,400 less) and Japan (30.07 per cent or 400,400 less).

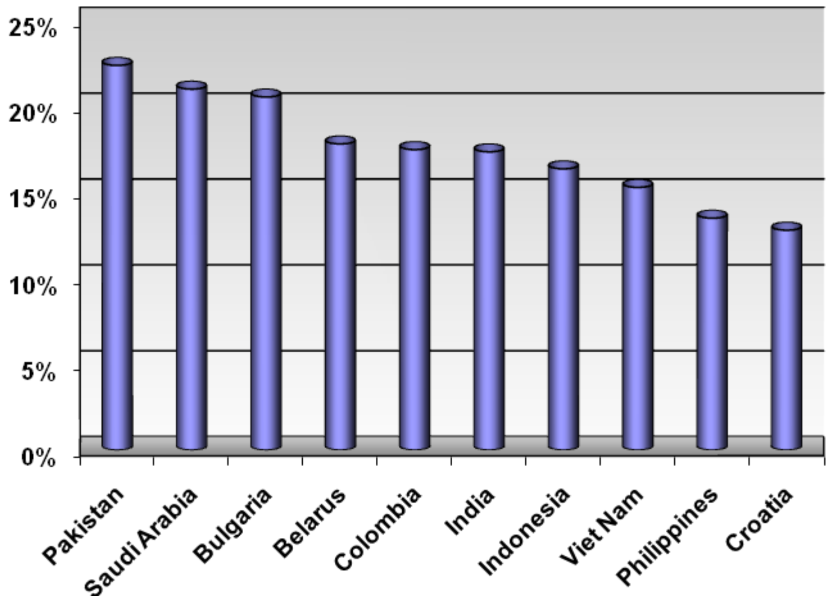
Figure 9: Broadband Subscribers Added in Q1 2008



4.3 Percentage Growth

Figures 10 and 11 show the 'top ten' countries in terms of quarterly growth and yearly growth respectively. It is important to point out that both figures 10 and 11 only include countries with 100,000 or more broadband subscribers by the end of Q1 2008. This is because the interpretation of percentage growth rates are not a measure of the quantities involved, and a small number of additions can make a relatively large difference when the subscriber base is small.

Figure 10: Top Ten Countries by Quarterly Growth in Q1 2008



Pakistan experienced the highest quarterly growth at 22.39 per cent or 157,500 new subscribers added. Saudi Arabia had the second highest quarterly growth at 21.01 per cent (720,000 new subscribers) and Bulgaria was the only other country out of the ten that added over 20 per cent of new subscribers over the quarter at 20.55 per cent (440,000 new subscribers).

India added the highest number of new subscribers of those countries shown in figure 10. Over 3.6 million new subscribers were added in India representing 17.36 per cent quarterly growth. Only two other countries out of the top ten added over 1 million subscribers. They were Viet Nam with 1.5 million new subscribers representing 15.29 per cent growth, and Colombia with 1.4 million new subscribers representing 17.49 per cent growth.

Three new countries had improved their quarterly growth rates to such a degree that they appeared in the top ten for Q1 2008 (figure 9). They were Saudi Arabia, Bulgaria and Colombia. As a result, Egypt, Ukraine and Greece formerly in the top ten for Q4 2007 are not in the top ten for Q1 2008.

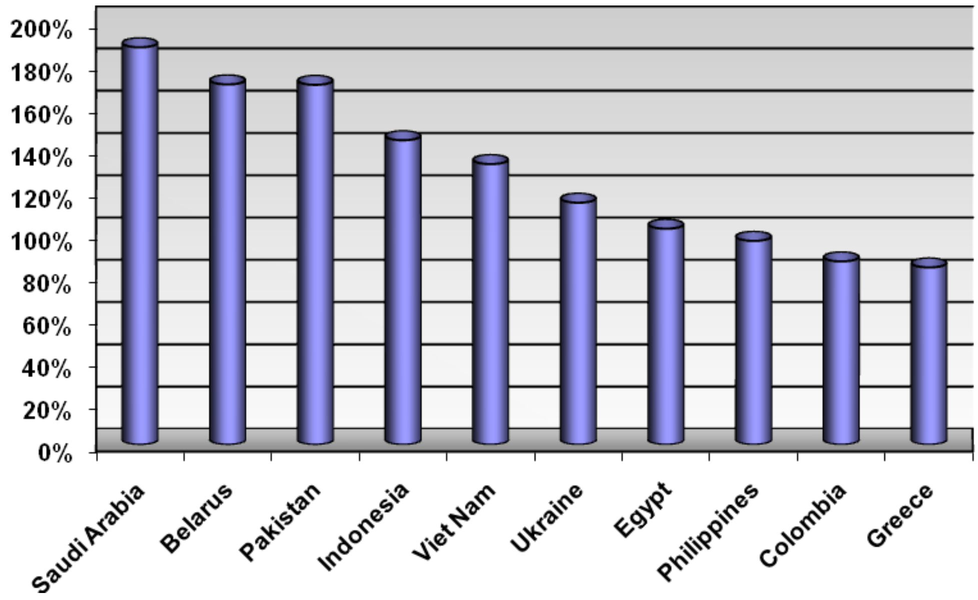
Figure 11 shows that Saudi Arabia had the highest annual growth rate from Q1 2007 to Q1 2008 at 188 per cent. Saudi Arabia's net additions for the year totalled 720,000 placing the country fourth in terms of net additions. Belarus had the second highest growth rate at 170.45 per cent adding 119,000 new subscribers, closely followed by Pakistan with yearly growth of 170.24 per cent or 157,500 new subscribers.

Three countries out of the ten shown in figure 11 added over 1 million new subscribers over the year. Viet Nam added the largest number of new subscribers totalling 1.49 million and representing 132.76 per cent annual growth. Colombia had the second largest number of new broadband subscribers with 1.42 million

(86.71 per cent annual growth) and Greece was in third place with 1.2 million subscribers (83.86 per cent).

Two new countries entered the top ten due to an improvement in their annual growth since Q4 2007. They were Saudi Arabia and Colombia (86.71 per cent). Croatia and Romania, which both appeared in the equivalent top ten in Q4 2007 did not appear in the top ten in figure 11.

Figure 11: Top 10 Countries by Annual Growth in Q1 2008



4.4 Technologies Adopted

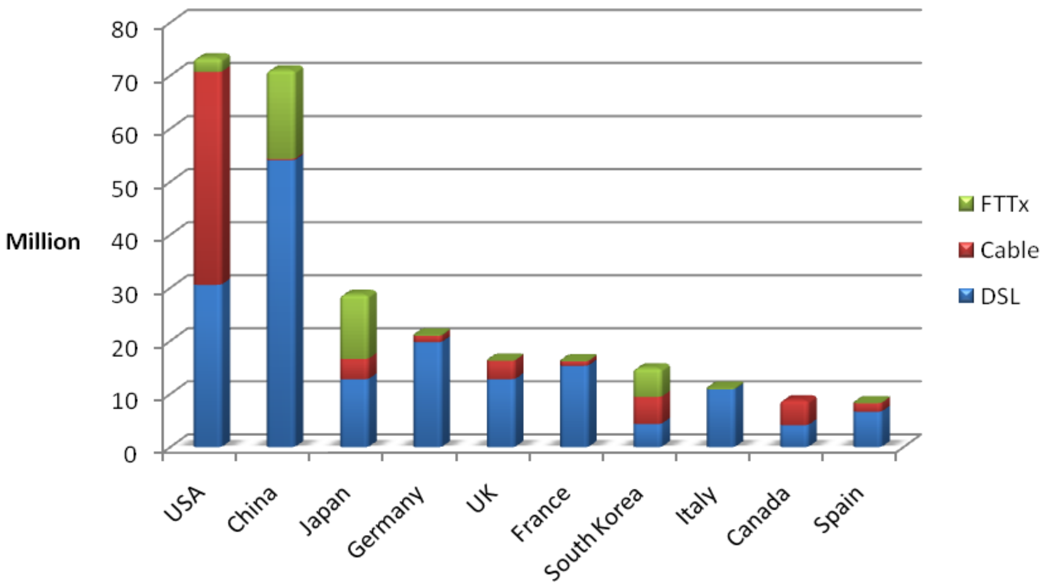
The broadband technologies used by the 'top ten' ranked countries are shown in figure 12. DSL is the most popular technology with over 171 million subscribers out of those in the top ten using this technology, representing 62.86 per cent of total subscribers in the top ten. Cable modem is the next most common technology with over 61 million subscribers or 22.45 per cent of the total followed by FTTx with over 37 million subscribers or 13.7 per cent of the total.

Figure12 gives an insight into what these countries favour in terms of broadband technologies. For instance, one can see that operators in China favour DSL for the majority of their broadband connections which total over 54 million (19.84 per cent the total) but they are also beginning to adopt FTTx with 16.7 million subscribers (6.13 per cent) using this type of technology.

DSL is also extremely popular in Germany, the UK and in France where such subscribers amount to 19.7 million (7.25 per cent), 12.7 million (4.68 per cent) and 15.3 million (5.62 per cent) respectively.

The USA and Japan have a substantial amount of DSL subscribers totalling over 30 million (11.22 per cent) and 12.7 million (4.68 per cent) respectively. But DSL is not the majority technology in either country. Cable modem users are more common in the US, totalling 40.1 million in Q1 2008 or 14.71 per cent, and in Japan, FTTx is almost equally as common with 12.12 million subscribers amounting to 4.45 per cent.

Figure 12: Total Subscriber Numbers* by Technology Adopted in Q1 2008



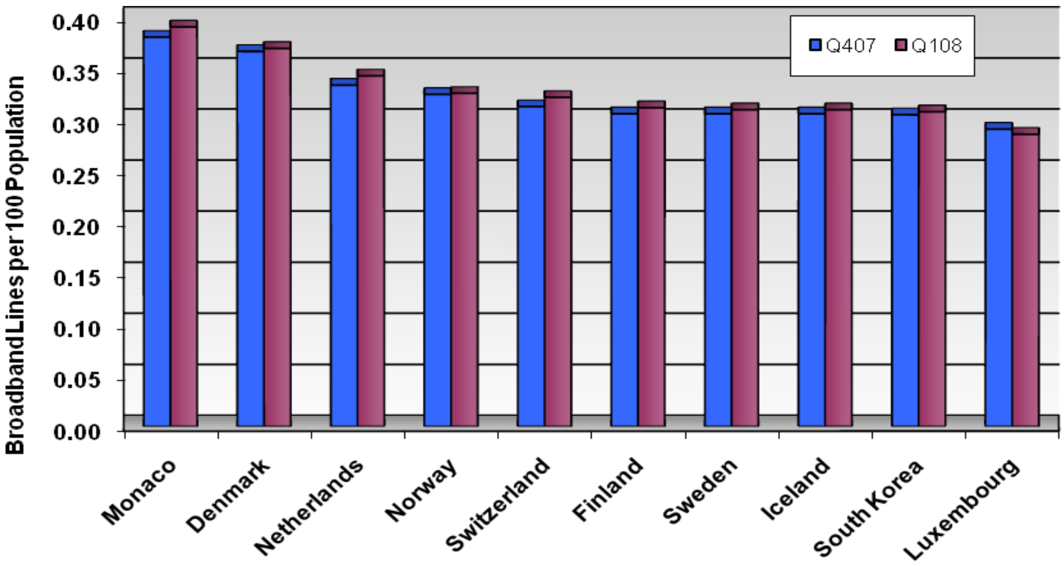
*1 per cent of this total consists of various "other" technologies, which have been deemed too small in subscriber base to be included for analysis.

4.5 Population and Household Penetration

The 'top ten' countries ranked in terms of population penetration in Q1 2008 are shown in figure 13. Monaco had the highest population penetration at 39.1 per cent for the third quarter running after displacing Denmark in Q2 2007. After being displaced from the number one spot Denmark had the second highest population penetration rate for three quarters running including Q1 2008 when its penetration was 37 per cent. Netherlands was in third place with 34.3 per cent followed by Norway with 32.6 per cent.

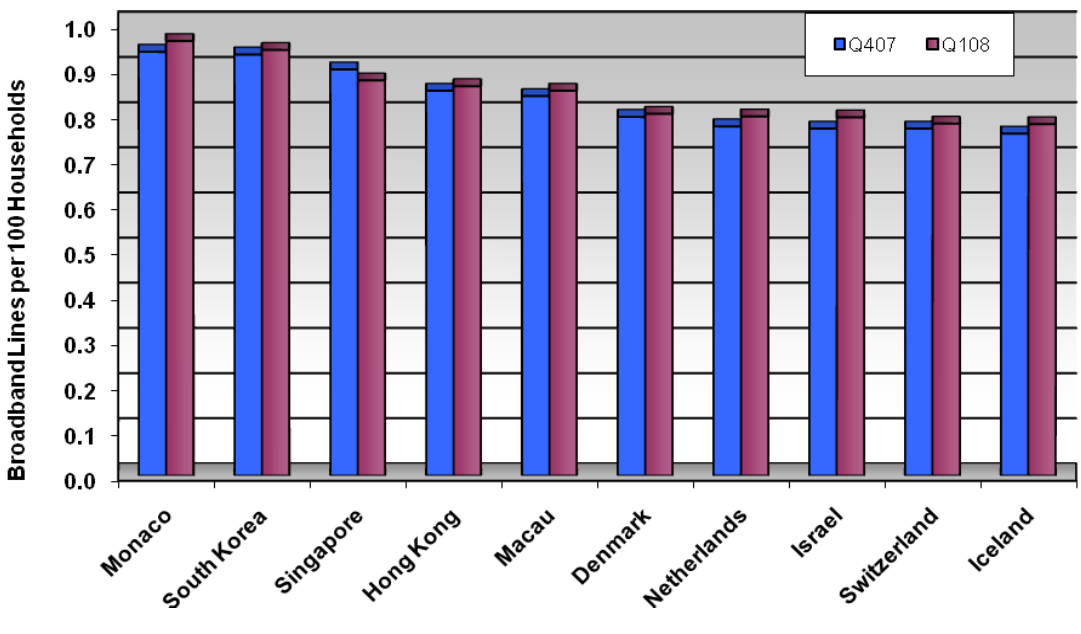
Of the top ten countries present in figure 13, there was one new entrant not present in the Q4 2007 ranking. This was Luxembourg in tenth place with a population penetration of 28.6 per cent. As a result, Hong Kong which formerly took up the tenth place was pushed down to twelfth place (27.8 per cent) and is therefore not shown.

Figure 13: Broadband Penetration by Population in Q4 2007 and Q1 2008



The 'top ten' countries ranked in terms of household penetration in Q1 2008 are shown in figure 14. Monaco, where 96.2 per cent of all households have broadband services, was ranked in first place for the second quarter running after displacing South Korea from the number one spot in Q3 2007. South Korea has remained in second place since Q4 2007 with a household penetration of 94.2 per cent. Singapore was in third place (87.5 per cent) followed by Hong Kong (86.1 per cent) and Macau (85.2 per cent). All of the countries in the top ten in Q1 2008 were present in the top ten in Q4 2007.

Figure 14: Broadband Penetration by Household in Q4 2007 and Q1 2008



5. Methodology and Supporting Material

5.1 Data Collection

Point Topic aims to offer the most complete, up-to-date and accurate source for world broadband statistics and estimates. In order to do this, we collect quarterly statistics from major primary suppliers of DSL lines, cable modems and FTTx services. We also collate data from service providers which resell products provided by these primary suppliers. Many operators now publish quarterly numbers as part of their regular reporting cycle. Numerous others provide us with their numbers via email and personal communication. We are, as always, most grateful to all of them for having taken the time to do so.

Many operators continue to release annual reports as opposed to quarterly ones. Some also choose to aggregate subscriber trends into overall totals, avoiding break-downs by technology. In these cases, Point Topic has continued conservatively estimating broadband up-take. Key sources for such estimated totals typically include prior and partial reports by the operators themselves. National Regulatory Authorities (NRAs) also frequently report DSL and other broadband statistics, although often with a greater time delay. Despite any difficulties that may arise as a consequence of this publication schedule, Point Topic will continue to provide the most up-to-date broadband statistics and estimates in our reports. In cases where these sources are unavailable, DSL and cable vendors often give useful indicators, as do estimates quoted by the trade press. Where we do have secondary estimates, we try as far as is possible to trace these to their original source.

During the research process for the latest quarterly statistics report, we often return to preceding quarters with the aim of synchronising earlier estimates with official sources. Some changes to the figures in Q3 2007 were necessary and deviation from earlier reports is possible. We shall continue to maintain close correspondence with broadband operators, national regulators and industry organisations in order to avoid ambiguities and also so as to minimise the number of restatements. Some of the historical statistics will be different from those published in earlier reports and contained within Excel spreadsheet datasets. Point Topic's *Global Broadband Statistics* service (GBS) contains the most up-to-date information and we endeavour to continuously update its data entries on an ongoing basis. Generally, precedence should be given to the figures contained within the most recent report (this report) and the figures in GBS.

Data collected for individual operators may be aggregated in GBS in order to derive country and region totals, growth and penetration rates, market shares of operators and net additions. Full details at the operator level are also contained in the GBS service, which is available to Point Topic subscribers.

5.2 Variations in Coverage and Definitions

In principle, the definition of broadband Internet refers to connections with speeds of no less than 256 Kbps. For DSL statistics, all lines which are described by their suppliers as "DSL" are included. In practice the great majority of these are ADSL, variants such as ADSL2+ or other such versions of ADSL. The main exceptions are:

- VDSL lines, of which Korea Telecom and Hanaro are the major reporting suppliers
- Symmetrical DSL lines, offered mainly by Competitive Local Exchange Carriers such as Covad in the USA and their counterparts in other countries

Occasionally, there are contradictions between operator and regulator reports. This happens in South Korea, for example, where the operators typically report broadband subscriptions as either DSL or cable modem, whereas the regulator chooses to break this down further down into an "apartment LAN" or "A-LAN" category. A-LAN is defined as using a shared fibre or broadband copper connection to the apartment block with Ethernet-based distribution within the apartment block. Operator classifications of these A-LAN subscriptions vary, but they are often included as DSL lines. We have classified all these A-LAN lines as FTTx, although a proportion of them do use copper rather than fibre backhaul.

Other reported statistics may combine broadband lines of different technology types. If a number is an aggregate of major broadband types, such as DSL and cable modem, we generally break up such an aggregate and state uptake for each category separately in GBS. In cases where there is only a marginal proportion using a different technology, the aggregate is kept and assigned to the larger group. These cases are usually noted with a comment in the source 'Notes' of (GBS v2).

5.3 Resources for Subscribers

In Aug 2006, Point Topic launched the full version of its *Global Broadband Statistics* database (GBS). Subscribers to Point Topic who wish to carry out their own analyses of broadband trends are welcome to query GBS and download data relevant to their own research.

Subscribers to the *Operator Source* service will also be granted direct online access to data in old workbooks collated up to December 2005. For further information, please refer to our website. This workbook series was discontinued in Q1 2006.

It is inevitable that a production of this nature will contain errors and omissions. We would be grateful if readers would notify us of any they may discover by sending an email to info@point-topic.com.

6. Tables

Table 1 DSL subscribers, Non-DSL, and total broadband subscribers (000's) in major countries (Top 30): Americas

	Total broadband subscribers			Non-DSL subscribers			DSL subscribers		
Country	**Q407**	**Q108**	**Q407-Q108, Growth**	**Q407**	**Q108**	**Q407-Q108, Growth**	**Q407**	**Q108**	**Q407-Q108, Growth**
World Total	351,117	367,624	4.70	122,345	129,570	5.91	228,772	238,054	4.06
USA	73,207	75,742	3.46	43,310	45,150	4.25	29,897	30,592	2.32
Canada	8,659	8,860	2.32	4,590	4,729	3.05	4,069	4,130	1.51
Brazil	7,477	7,949	6.31	2,035	2,210	8.60	5,442	5,739	5.45
Mexico	4,142	4,575	10.46	1,183	1,222	3.30	2,959	3,353	13.32
Argentina	2,297	2,470	7.54	685	734	7.15	1,612	1,736	7.70
Other Americas	4,771	5,160	8.17	1,593	1,700	6.74	3,177	3,460	8.89
Total Americas	100,552	104,756	4.18	53,395	55,746	4.40	47,157	49,010	3.93

Table 1 (continued) DSL subscribers, Non-DSL, and total broadband subscribers (000's) in major countries: APSEA

	Total broadband subscribers			Non-DSL subscribers			DSL subscribers		
Country	**Q407**	**Q108**	**Q407-Q108, Growth**	**Q407**	**Q108**	**Q407-Q108, Growth**	**Q407**	**Q108**	**Q407-Q108, Growth**
China	66,564	71,035	6.72	14,548	16,963	16.59	52,016	54,072	3.95
Japan	28,426	28,826	1.41	15,239	16,061	5.40	13,187	12,765	-3.20
South Korea	14,710	14,869	1.08	10,107	10,501	3.90	4,603	4,368	-5.11
Australia	5,391	5,736	6.40	1,343	1,380	2.75	4,047	4,355	7.61
Taiwan	4,632	4,659	0.58	917	1,010	10.14	3,715	3,649	-1.78
India	3,090	3,626	17.36	487	586	20.22	2,603	3,041	16.82
Viet Nam	1,294	1,492	15.29	25	27	7.52	1,269	1,465	15.45
Malaysia	1,265	1,400	10.67	-	-	-	1,265	1,400	10.67
Hong Kong	1,940	1,878	-3.18	882	815	-7.62	1,058	1,063	0.52
Thailand	716	748	4.54	15	16	4.42	700	732	4.54
Other APSEA	2,815	3,058	8.60	840	908	8.13	1,975	2,149	8.80
Total APSEA	130,842	137,327	4.96	44,404	48,268	8.70	86,438	89,059	3.03

Table 1 (continued) DSL subscribers, Non-DSL, and total broadband subscribers (000's) in major countries: EMEA

Country	Total broadband subscribers			Non-DSL subscribers			DSL subscribers		
	Q407	Q108	Q407-Q108, Growth	Q407	Q108	Q407-Q108, Growth	Q407	Q108	Q407-Q108, Growth
Germany	20,002	21,184	5.91	1,228	1,418	15.42	18,773	19,767	5.29
UK	15,729	16,318	3.75	3,459	3,549	2.61	12,270	12,769	4.07
France	15,591	16,208	3.96	846	882	4.25	14,745	15,326	3.94
Italy	10,861	11,232	3.42	341	354	3.94	10,520	10,878	3.40
Spain	7,989	8,291	3.77	1,573	1,621	3.06	6,416	6,669	3.95
Netherlands	5,444	5,596	2.79	2,331	2,348	0.69	3,113	3,249	4.36
Russia	4,945	5,333	7.84	2,645	2,769	4.69	2,300	2,564	11.47
Turkey	4,509	4,986	10.57	33	33	1.53	4,476	4,953	10.63
Poland	3,448	3,627	5.20	1,068	1,144	7.20	2,380	2,482	4.30
Sweden	2,763	2,805	1.52	1,086	1,101	1.38	1,677	1,704	1.61
Belgium	2,553	2,642	3.49	913	954	4.45	1,640	1,688	2.96
Switzerland	2,334	2,402	2.91	802	820	2.25	1,532	1,582	3.26
Romania	2,078	2,291	10.24	1,718	1,843	7.26	360	448	24.44
Denmark	1,988	2,009	1.03	791	787	-0.52	1,197	1,221	2.05
Austria	1,645	1,704	3.59	605	593	-1.92	1,040	1,111	6.79
Finland	1,614	1,636	1.37	256	260	1.60	1,358	1,376	1.33
Portugal	1,569	1,614	2.84	617	642	3.97	952	972	2.10
Israel	1,579	1,610	1.96	616	640	3.90	963	970	0.73
Other EMEA	13,067	14,036	7.42	3,601	3,779	4.95	9,466	10,257	8.36
EMEA Total	119,707	125,523	4.86	24,530	25,538	4.11	95,177	99,985	5.05