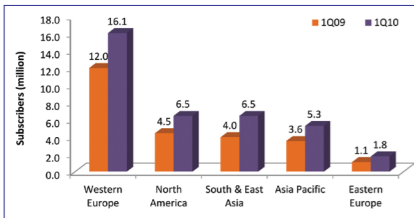


Global Broadband Statistics

Top Five Regions by IPTV Subscribers

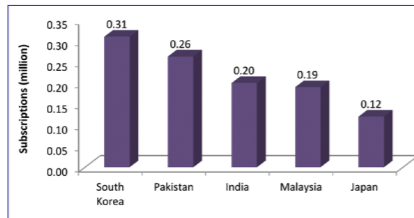


Note:
For 1Q 2010, global IPTV subscribers totalled 36.3 million, increase of 44% from 1Q2009 (25.2 million subscribers). According to SNL Kagan, IPTV subscribers forecast to grow to 59.7 million subscribers by 2013.

In Malaysia, five IPTV licenses have been issued to Fine TV Network Sdn Bhd, TM Net, DE Multimedia Sdn Bhd, U Television Sdn Bhd and MOL Media Sdn Bhd.

Source: "World IPTV Subscribers to Q1 2010" by Point Topic, March 2010; "The State of Global IPTV" by SNL Kagan, March 2010

Asia Pacific Top Countries by WiMAX Subscriptions, 1Q10

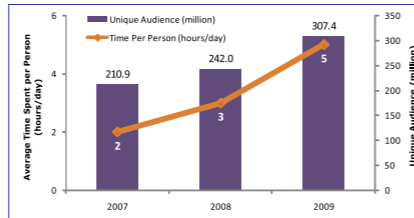


Note:
Asia Pacific has 1.14 million WiMAX subscriptions, with 12 countries having launched WiMAX services in the region by end 1Q10. Operators in Pakistan, Malaysia and Japan are the main sources of growth in the market.

Malaysia's P1 has over 100,000 subscribers by end of 2009.

Source: "Asia Pacific, Top Countries by WiMAX Subscriptions, 1Q10" by Informa Telecoms & Media

Global Web Traffic to Social Networking Sites



Note:
ITU estimated 1.9 billion people have access to a computer in 2009. Global data above takes into account the following countries: US, UK, Australia, Brazil, Japan, Switzerland, Germany, France, Spain and Italy. Social networks and blogs are the most popular online category when ranked by average time spent, followed by online games and instant messaging.

According to Malaysia Household Use of Internet Survey (HUIS) 2009, 47% users use the Internet for social networking and online community.

Source: "Led by Facebook, Twitter, Global Time Spent on Social Media Sites up 82% Year over Year", www.blog.nielsen.com, January 2010; SKMM

myBroadband

A quarterly newsletter



Suruhanjaya Komunikasi dan Multimedia Malaysia
Malaysian Communications and Multimedia Commission



Highlights!

- Digital Districts: Building Blocks to a Digital Nation
- National Broadband Initiative
- High Speed Broadband: Enabling A New Lifestyle
- Top Total Twit Contributed in World
- Enterprise security 2010
- Green Broadband Opportunities
- Consumers Seek Promotional Input
- Switch in Trend – Mobile Location-based Services
- News Accessed on Handheld Devices
- Demographics Of Note
- Global Broadband Statistics

Digital Districts: Building Blocks to a Digital Nation

The Digital District programme is aimed to spur the digital technology culture through usage of broadband in content and applications service amongst the people within a given district in Malaysia. This starts with provision of Wi-Fi service at the village or *kampung* level (namely *Kampung Wi-Fi*) which acts as a nucleus to the Digital Districts. The *Kampung Wi-Fi* is supported by other initiatives such as telecentres, connected schools, libraries, hospitals, clinics, government offices and others. In other words, it empowers a whole community into using high speed communication services and access to knowledge for their purposes in socio-economic activities and lifestyle. Boosting productivity and innovation through this context enables the community to play its vital role in national economic growth into the future.

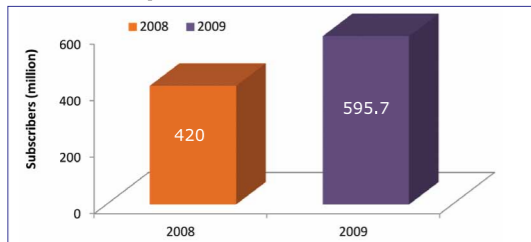
The Digital District Programme is part of the National Broadband Initiative to drive broadband connection and usage in the country. Its supports the Economic Transformation Programme through the Communication Content and Infrastructure initiative, which is one of the National Key Economic Areas in developing the nation towards Vision 2020.

The Programme affirms the Government's determination to incorporate ICT and broadband in the digital district strategy in conjunction with the national unity agenda, "Gagasan 1Malaysia". Together with *Kampung Wi-Fi*, the digital district strategy adopts a "building block" approach. This means working on the smallest units and integrating these to build "Digital States" and beyond towards a "Digital Nation" and Gagasan 1Malaysia.

The first Digital District was launched in the town of Pekan by the Most Honourable Prime Minister on 30 January 2010. This is the first of a pilot project of three districts; the other two being at Pagoh-Muar and Jempol. The programme involves public-private partnership among various government bodies, communications service providers, and other vendors. The first *Kampung Wi-Fi* was launched in Sibul's Kg Bahagia in Sarawak, with Wi-Fi transmission from a public payphone at a school in the village.



3G Subscription Growth Worldwide



Note:
According to RNCOS, Asia-Pacific will dominate the global 3G-subscriber base by end 2013 (constitute over 56% of the global 3G subscriber base) followed by EMEA (Europe, Middle East and Africa) and the Americas.

By end 2009, 3G subscribers in Malaysia reached 7.3 million, a 68% growth from 2008 (4.37 million).

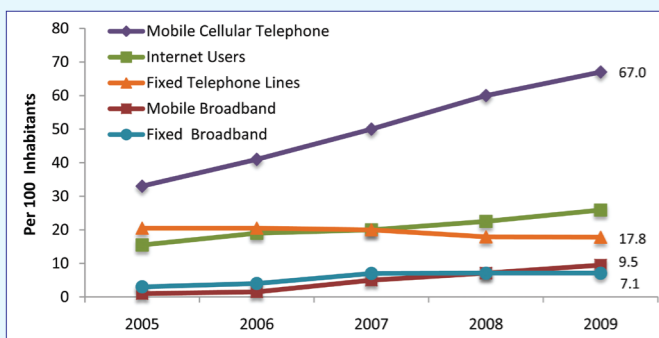
Source: GSACom; SKMM

FASTER Download Times

Technology	MP3 Song	DVD Movie	HD Movie
WCDMA	100 sec	21 hours	3 days
HSPA	10 sec	2 hours	8 hours
LTE	0.38 sec	4.8 min	17 min

Source: "Application Download Times" by GSACom

Global ICT Growth



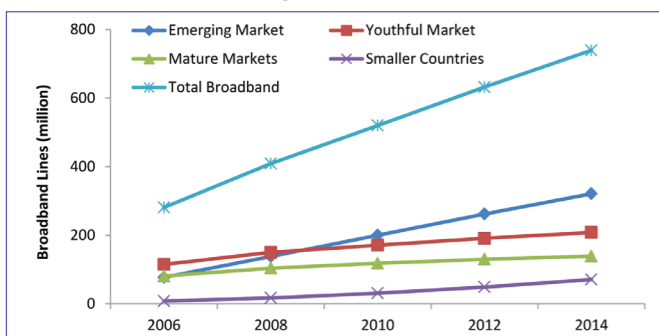
Source: "ITU News" by ITU, March 2010

	2005	2006	2007	2008	2009
Mobile Cellular Telephone	33	41	50	60	67
Internet Users	15.5	19	20	22.5	25.9
Fixed Telephone Lines	20.5	20.5	20	17.9	17.8
Mobile Broadband	1	1.5	5	7.1	9.5
Fixed Broadband	3	4	7	7.1	7.1

Note:
ITU predicts that after mobile broadband overtook fixed broadband in 2008, more people will access the Internet via laptops and smart mobile devices than from desktop computers within the next five years.

According to Malaysia Household Use of Internet (HUIS) 2009, 88.6% of users access the Internet via a broadband connection and the balance of 11.4% access via dial-up.

Broadband Forecasts by Market



Source: "World Broadband Forecast" by Point Topic, February 2010

Broadband lines (million)	2006	2008	2010	2012	2014
Emerging Market	77	138	200	262	321
Youthful Market	115	150	171	191	208
Mature Markets	81	104	118	130	139
Smaller Countries	8	17	31	49	71
Total Broadband	281	409	520	632	739
	273	392	489	583	668

Note: Malaysia is included in Emerging Market, estimated at rank 27 out of 40 countries for year 2014

National Broadband Initiative

The National Broadband Initiative (NBI) is a national strategy to "broadband" the nation. On 24 March 2010, the High-Speed Broadband (HSBB) programme was launched as part of the NBI implementation. The launch was officiated by the Prime Minister Datuk Seri Najib Razak.

Other NBI Projects/ Programmes:

- Rakyat Internet Centres (Pusat Internet Rakyat) and Mini Community Broadband Centres (CBC)
- 1 Million Netbook Initiative to distribute netbooks to qualified students and individuals nationwide
- Setting up of e-Kiosks
- CBC to the Home
- Expansion of Cellular Coverage

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High Speed Broadband: Enabling A New Lifestyle

Entertainment	Commerce	Interact	Collaborate
Enjoy high quality entertainment anytime in any format	Enriching shopping experience and commerce opportunity	Interact with anyone in a virtual community	Work with anyone anywhere at anytime
<ul style="list-style-type: none"> • Watch high resolution video-on-demand at any time • Participate in live show in real time from home • Play virtual reality game with anyone in the world • Download music and any content instantly 	<ul style="list-style-type: none"> • Virtual shops online enabled by real time video and chat • Get real time tips from merchants and experts 	<ul style="list-style-type: none"> • Talk to family on video as if in the same room • Gossip and share pictures/videos with friends • Reach out to an interest group in the virtual community • Participate in a class discussion with other schools 	<ul style="list-style-type: none"> • Work from home when you want to and talk by video with your colleagues at home or at office • Collaborate with your colleagues overseas on a complex task while at remote hotel • Attend school through virtual classroom when you are sick

Source: Telekom Malaysia Berhad

Top Total Twit Contributed in World

No.	Country	% Total Twit Contributed
1	USA	56.59
2	UK	8.09
3	Brazil	6.73
4	Canada	4.36
5	Australia	2.63
6	Indonesia	2.34
7	Germany	1.58
8	Japan	1.47
9	Netherlands	1.10
10	India	0.97
...
18	Malaysia	0.47

Note: Twitter users around the world during the period from 16 Oct 2009 to 16 Dec 2009-13 million unique Twitter accounts that demonstrated tweeting activity in that period, were explored.

Source:sysomos.com

Enterprise Security 2010

Top 10 security breaches in an organisation	Enterprise Data Loss Best Practices
1. Malware(Rising threat)	1. Understanding data most critical to business
2. Malicious insiders (Rising threat)	2. Knowing where the most critical data resides
3. Exploited vulnerabilities (Steady threat)	3. Deciphering the origin and nature of risk
4. Careless employees (steady threat)	4. Appropriate control strategy in place based on policy, risk and where sensitive data resides
5. Mobile devices (Rising threat)	5. Practice centrally managed control mechanism
6. Social networking (Rising threat)	6. Constant Audit to improve
7. Social Engineering (Steady threat)	
8. Zero-Day Exploits	
9. Cloud computing security threats (Rising threat)	
10. Cyber Espionage	

Source: Network SecurityEDGE, Jan29, 2010 Enterprise Data Loss Best Practices

Source: RSA Security Inc white paper "6 Best Practices for Preventing Enterprise Data Loss"

Green Broadband Opportunities

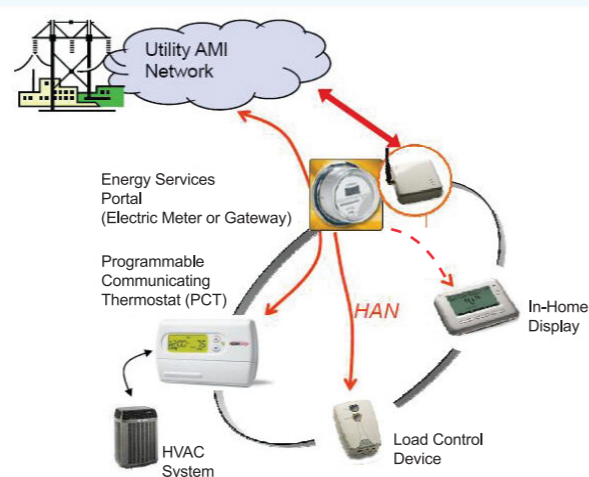
Energy Management Services Going Forward

With a touch of a button, you can monitor your energy usage, control high-energy consuming items like air-conditioning units and even automate your home to use 20% less energy than last month.



Source: <http://www.mahalo.com/home-energy-manager>

Home Energy Management



Source: <http://neuralenergy.blogspot.com/2009/07/hem.html>

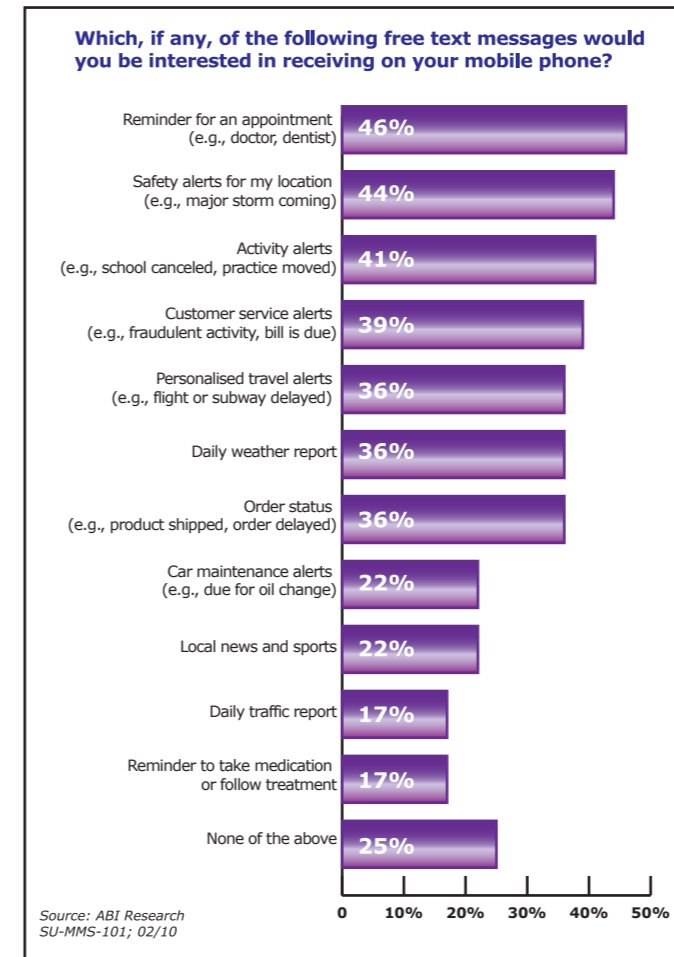
Technical and consumer trials are underway in the US on how best to deploy Energy Management Solutions (EMS) linking, for example, to the home gateway provided by the broadband service providers. Smart meter devices that make it possible for the utility provider, with consent from the customer, to manage peak energy usage during high-demand periods. Hence, consumers can manage their energy use as the meters provide real-time usage data.

US Regional Public Utilities Commissions need to determine if costs associated with EMS can be built into the rate base, thus allowing them to recover these expenses from the consumer. Recent studies indicate consumers are willing to pay up to USD48 for the equipment used for this purpose. However only a few, if any, will pay for ongoing monthly fee for this. US broadband providers and utilities are said to be working out the details.

Source: Based on TMC Net article Smart Home | Broadband Providers Are Best Positioned To Be the First to Deliver Energy Management at <http://smart-products.tmcnet.com/topics/smart-home/articles/68680-broadband-providers-best-positioned-to-deliver-energy.htm> (10 November 2009); <http://www.mahalo.com/home-energy-manager>

Consumers Seek Promotional Inputs

ABI Research Survey in March 2010 reported that although 25% of consumers say that they have no interest in receiving free text messages, some types of free text messages have close to 50% acceptance ratings. The most popular are shown in the chart below.



Source: ABI Research SU-MMS-101; 02/10

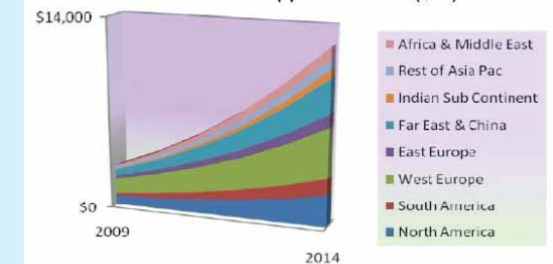
Source: <http://www.marketingcharts.com/wp/wp-content/uploads/2010/03/abi-free-text-messages.jpg>

Switch in Trend – Mobile Location-based Services

Juniper Research reported the Mobile Location Based Services (MLBS) market began accelerating in 2008 and 2009, and should only develop even more quickly in the next few years. The drivers for growth going forward are:

1. Launch of Apple iPhone and iTunes stores
2. Mobile phone applications taking off for larger consumer base, with appeal from users, and developers
3. High capacity infrastructure more available at 3G speeds and beyond
4. Mobile phone/device+Internet access rate growing
5. Development of navigable digital map content technologies
6. Location based services now a standard feature on many mobile devices
7. Mobile advertising a way to monetise MLBS

Growth in total MLBS/Apps Revenue (\$m)



Source: Juniper Research

News Accessed on Handheld Devices

Type of News	Mobile Users (%)
Weather	26
News and current events	25
An application for news content	18
Sports scores and stories	16
Traffic information	13
Financial information	12
News via emails and texts	11

Source: Pew Internet & American Life Project on American Adults, January 2010

Demographics Of Note

Generation*	Birth Years	Age (2009)	Insights into Shopping Habits & Others
Greatest Generation	Born before 1946	64+	• Members here are frugal, shaped by the Great Depression and World War II; more deal prone.
Boomers	1946 - 1964	45 to 63	• High earning Boomers have the largest annual \$ spend per household of any group. • Living longer more productive lives; deemed as "Pragmatic Idealists" and like apps that allow them continuous development; crave simplicity. • Increasingly caring for elderly parents, and growing older themselves. • They feel they can make things the way they want them to be, or at least engage with the forces at work to tilt the odds 51% in their favor.
Gen X	1965 - 1976	33 to 44	• Gen X follow next after the baby boomers in terms of earning power. • Gen X are the "Me" generation; values entertainment more than other age groups. • Grew up together with PC and video games, Gen X are said to be original technology enthusiasts.
Millennials	1977 - 1994	15 to 32	• Millennials do not like to waste time in-store, shop less often than other age cohort. So, they buy more per trip. They are most wired into the Internet. • Millennials share the idealism of Boomer. They are the "We" generation, fully connected and socially conscious. Technology is immersive to them – an extension of themselves. • Millennials use multiple media all at the same time; are original "prosumers" i.e., they are both consumer & producer of their online environment and services they use. • First generation to compete in a global economy, with global peers.

*Defined as a group of contemporaries comprising all of persons born during the same period, having shared interests and attitudes.

Source: Adapted from The Nielsen Company on Mining the US Generation Gaps, March 2010; The Shift – The Evolving Market, Players and Business Models in a 2.0 World from Alcatel Lucent, 2010; http://www.visibilitypr.com/Press_Room/Entries/2010/1/25_The_Power_of_Nostalgia_in_Advertising_2.html