

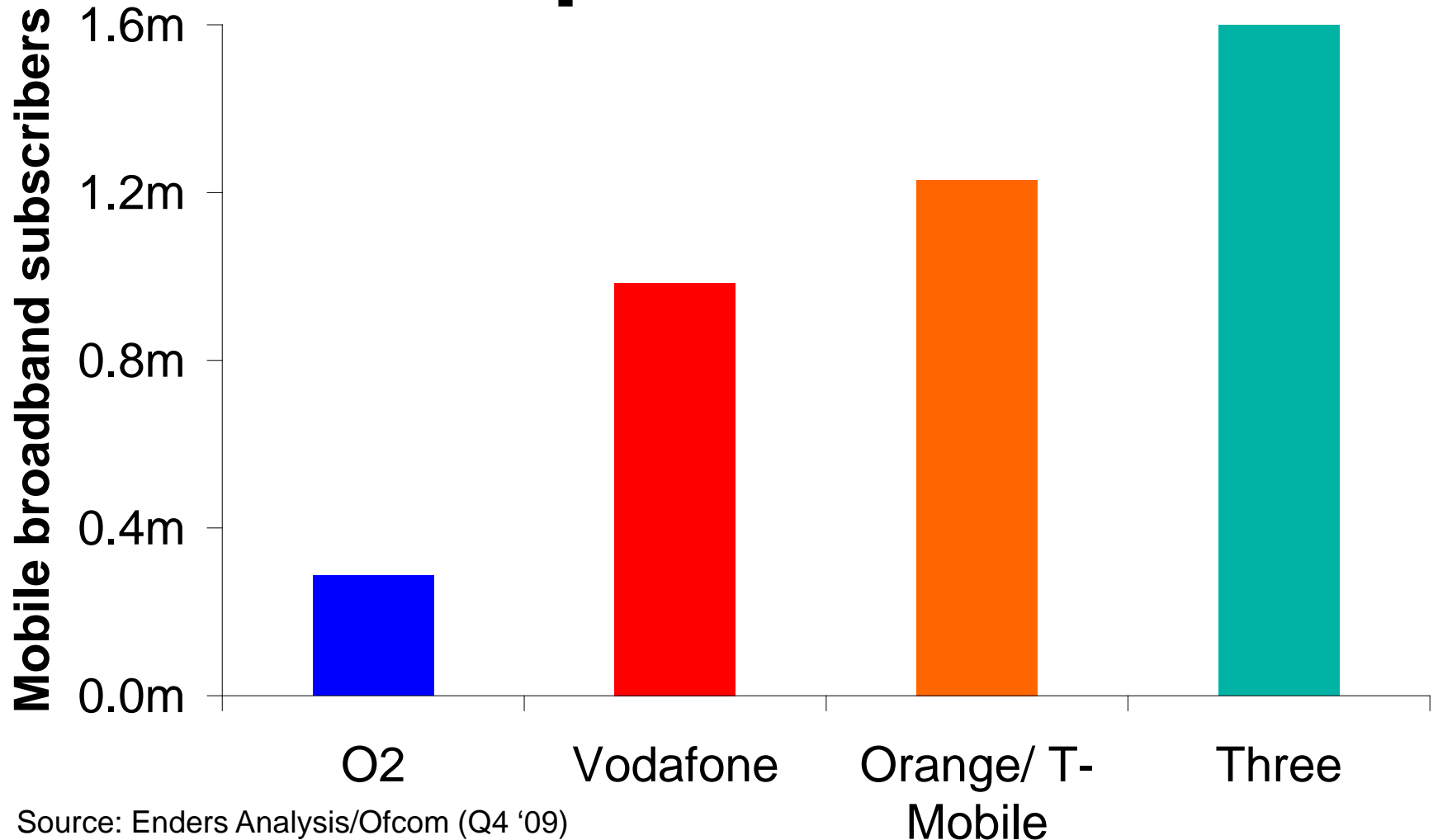
Building 21st century broadband.

Mark Falcon, Three
Westminster eForum
4 November 2010



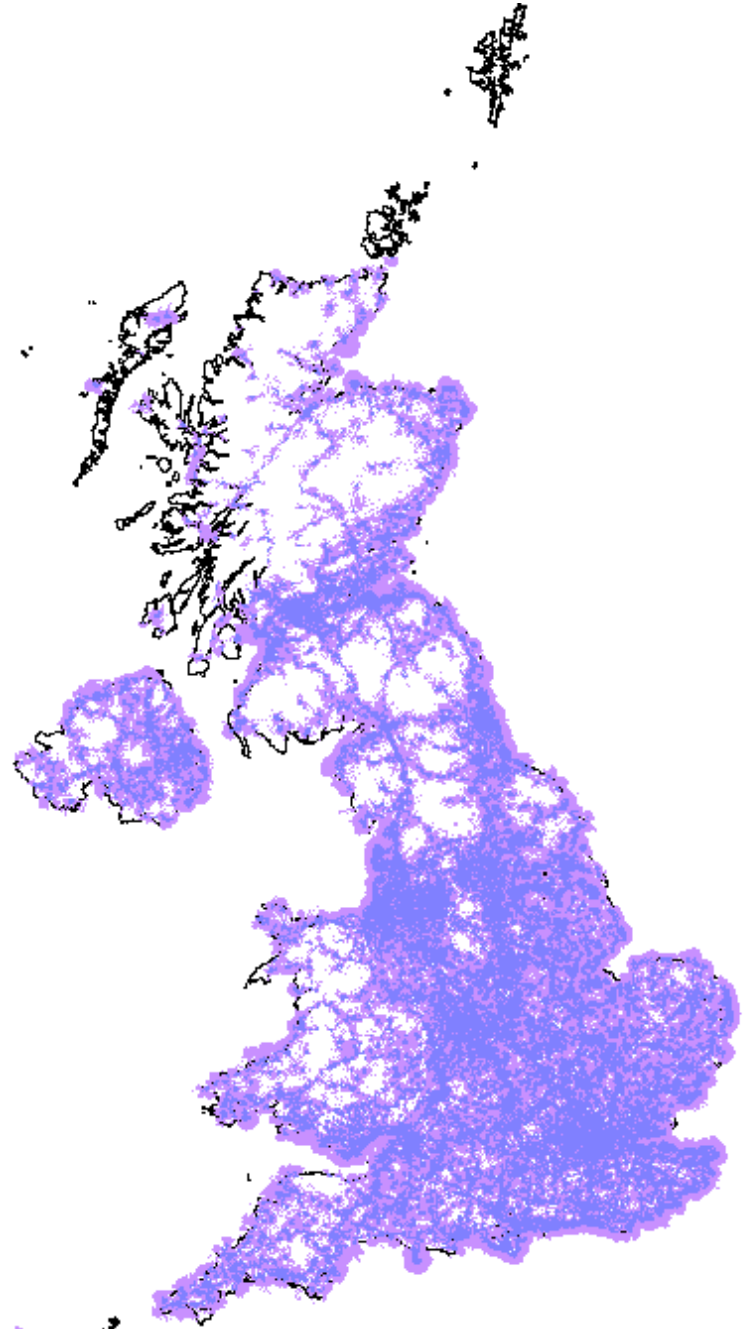
Three.co.uk

Three – largest UK mobile broadband provider.

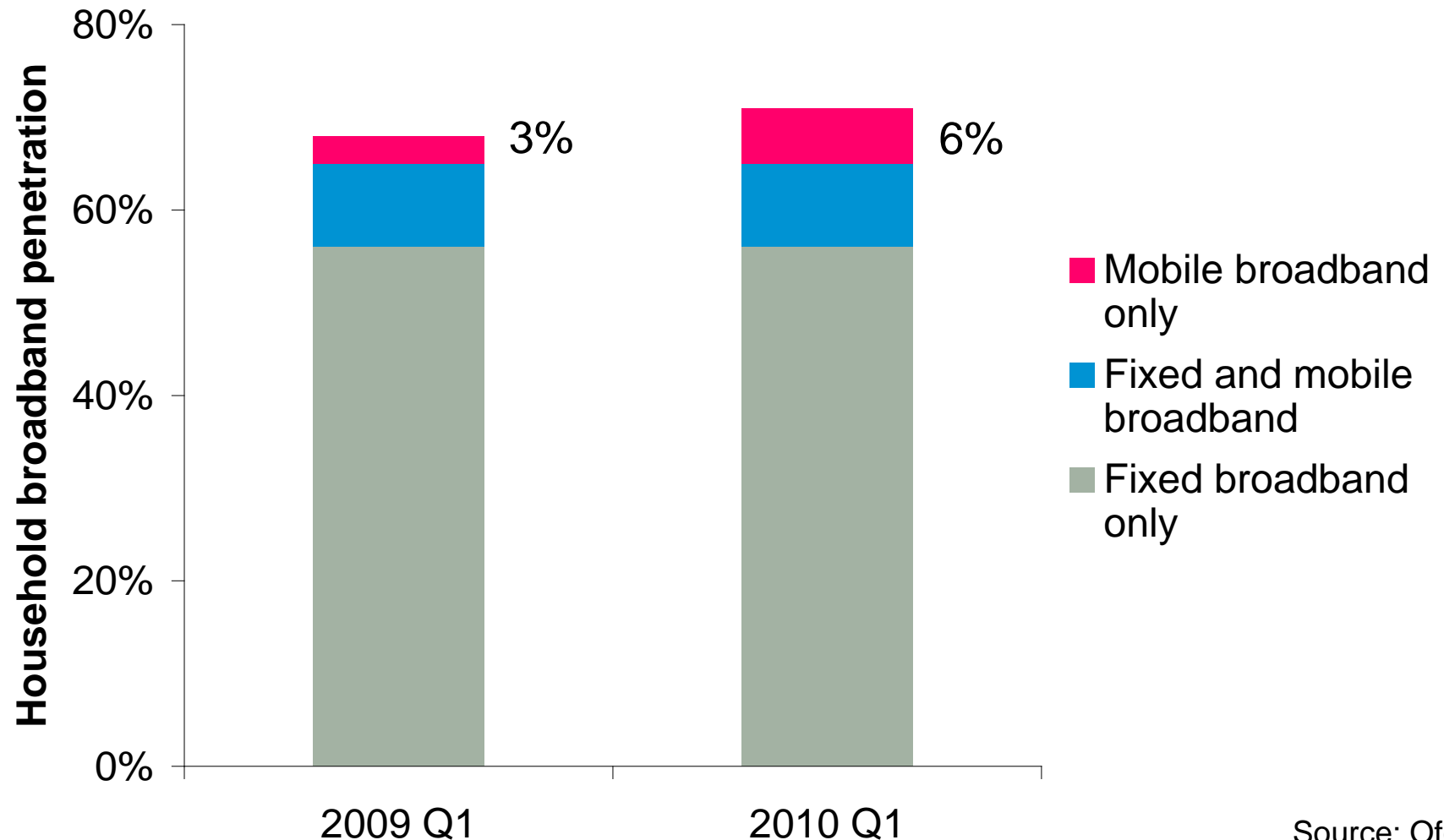


**Today, 97%
3G UK
population
coverage.**

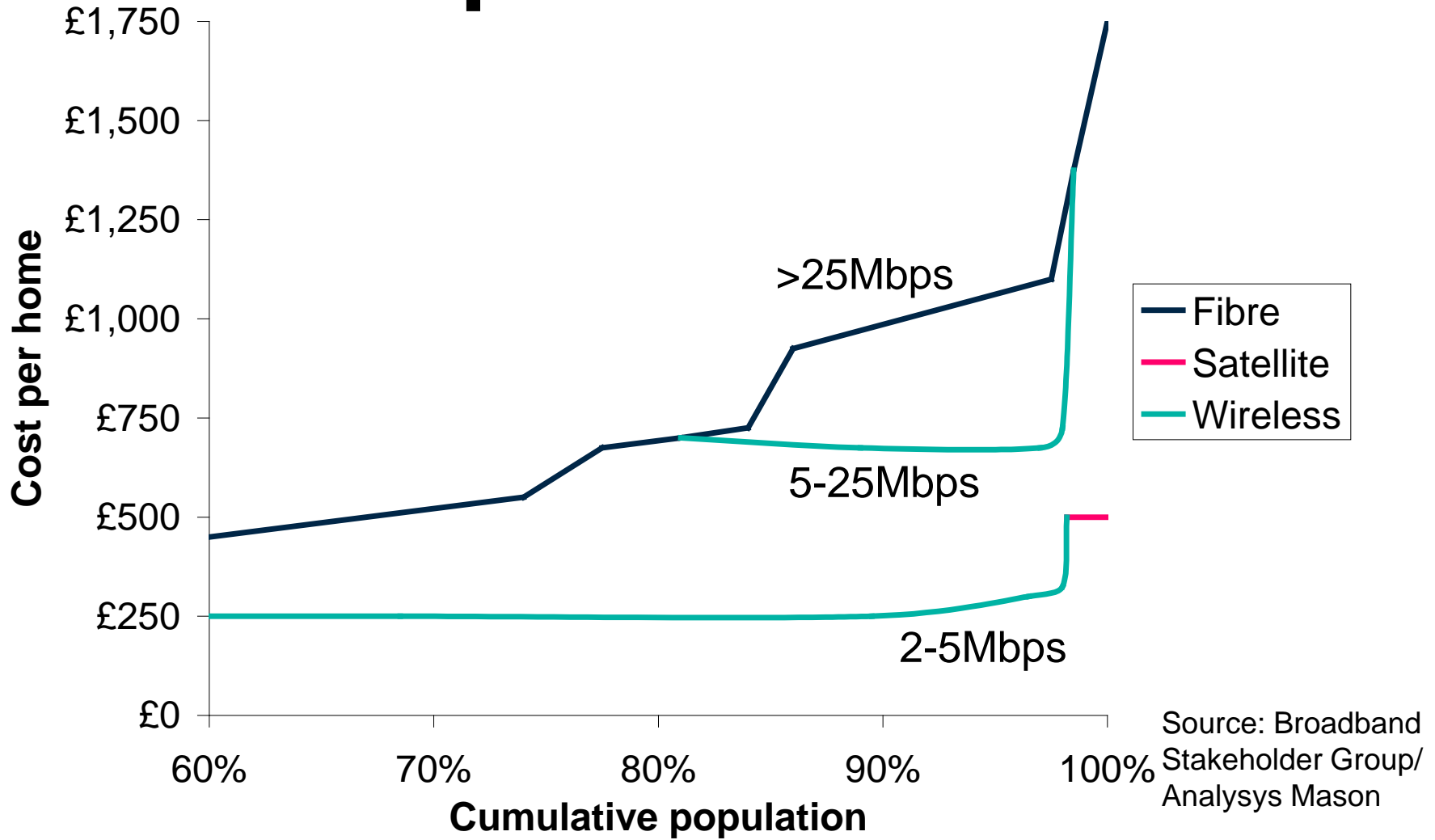
**By 2013,
>99%
coverage.**



Mobile driving UK broadband penetration.



Final third costs more. Fibre isn't cheapest.



“Disruptive technology transformations happen once every 10 to 15 years. Mobile broadband represents the convergence of the last two great disruptive technologies – internet computing and mobile communications – and may be more transformative than either of these previous breakthroughs.”

US National Broadband Plan, 2010

Thank you.



Three.co.uk

Westminster eForum – Building 21st Century Broadband, 4 November 2010

1. Thank you Chi. Good morning.

2. Who are Three?

We are the largest UK mobile broadband provider.

Followed by Orange/T-Mobile, Vodafone and O2.

How have we achieved that?

3. Through building the UK's largest mobile broadband network.

Which now offers 97% UK 3G population coverage – shown on this map.

And by 2013, we will have over 99% coverage – though an ongoing network investment programme – which will fill in most of the gaps left on the map.

4. This is why mobile broadband is driving UK broadband penetration.

In the last year, mobile broadband-only households doubled from 3% to 6%.

15% of UK households now have mobile broadband.

In comparison, fixed broadband has stalled at 65% - the first two thirds.

So how do we reach the final third?

5. A joint industry study published last week confirms what we already know – the final third costs more.

It also shows – that for most realistic uses – fibre isn't the cheapest way to get there.

In most cases, the most cost-effective technology is wireless, or a combination of wireless and satellite.

Conclusion: Govt's broadband policy – and strategy for achieving universal broadband – should embrace all technologies, in particular, wireless and mobile technologies.

6. In a final plug for mobile, I would like to leave this quote.