



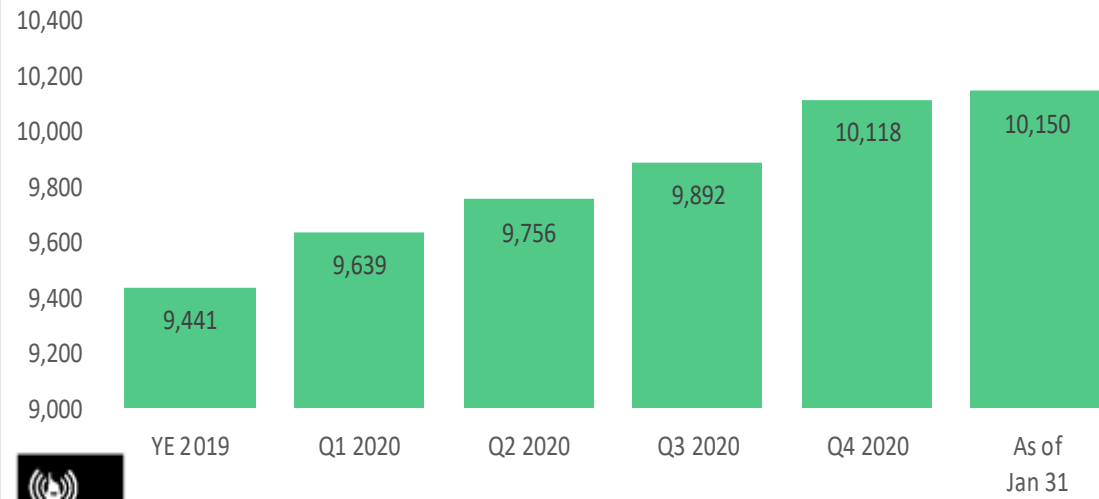
Building Digital Infrastructure for a Digital Philippines

**Atty. Roy D. Ibay
VP & Head,
Regulatory Affairs -
SMART**

“Advances in the technology of telecommunications have proved an unambiguous threat to totalitarian regimes everywhere.”

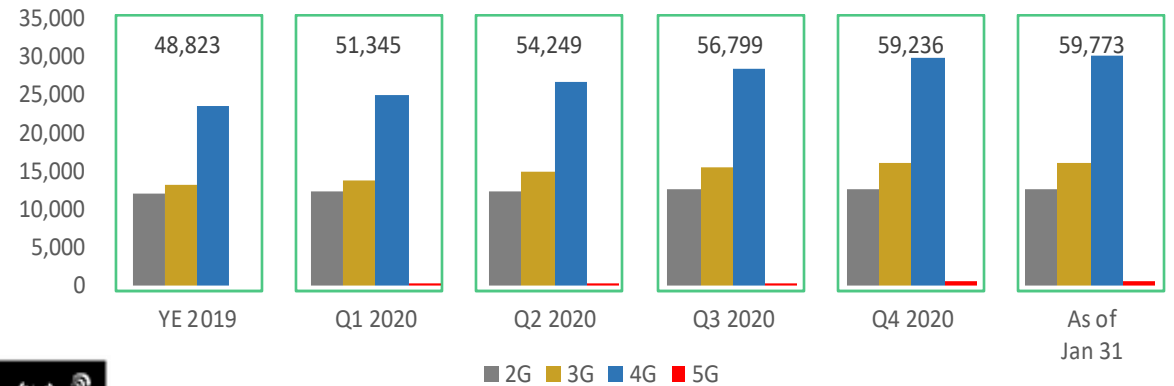
Rupert Murdoch

Physical Sites



	YE 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	As of Jan 31
Physical Sites	9,441	9,639	9,756	9,892	10,118	10,150
3G + LTE Presence	92%	92%	93%	94%	94%	94%
LTE Presence	86%	90%	91%	93%	94%	94%

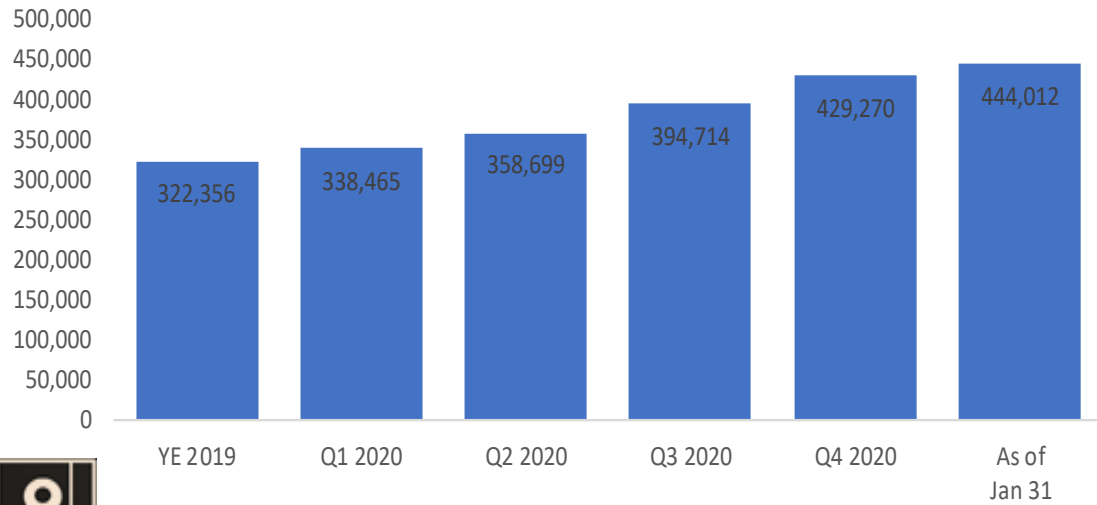
Base Station



	YE 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	As of Jan 31
Base Station	48,823	51,345	54,249	56,799	59,236	59,773
2G	12,212	12,309	12,441	12,555	12,635	12,639
3G	13,155	13,875	14,881	15,605	16,161	16,204
4G	23,456	25,088	26,800	28,408	29,987	30,229
5G	0	73	127	231	453	701

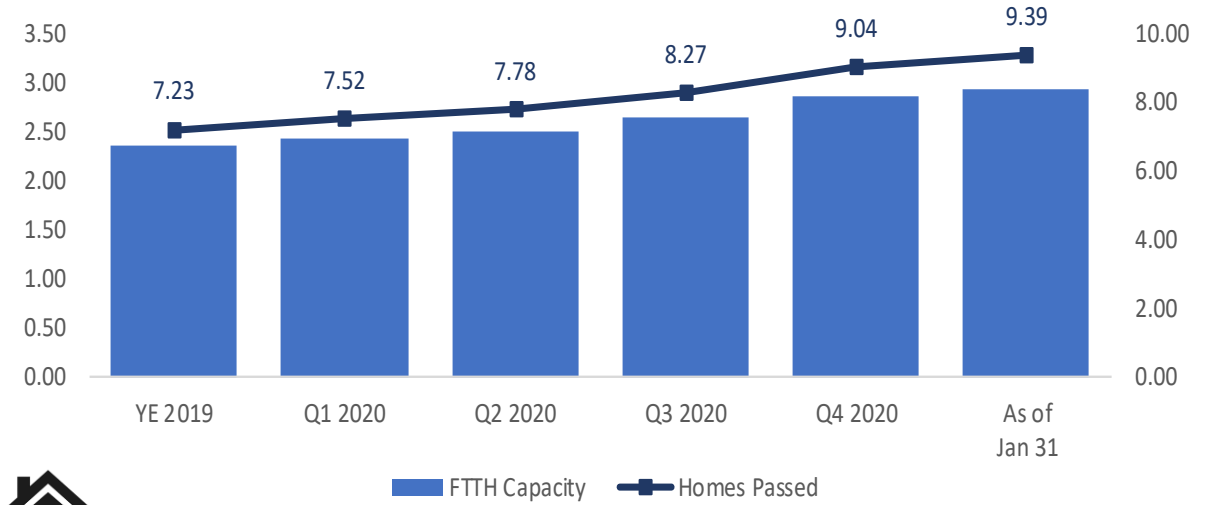


Fiber Footprint



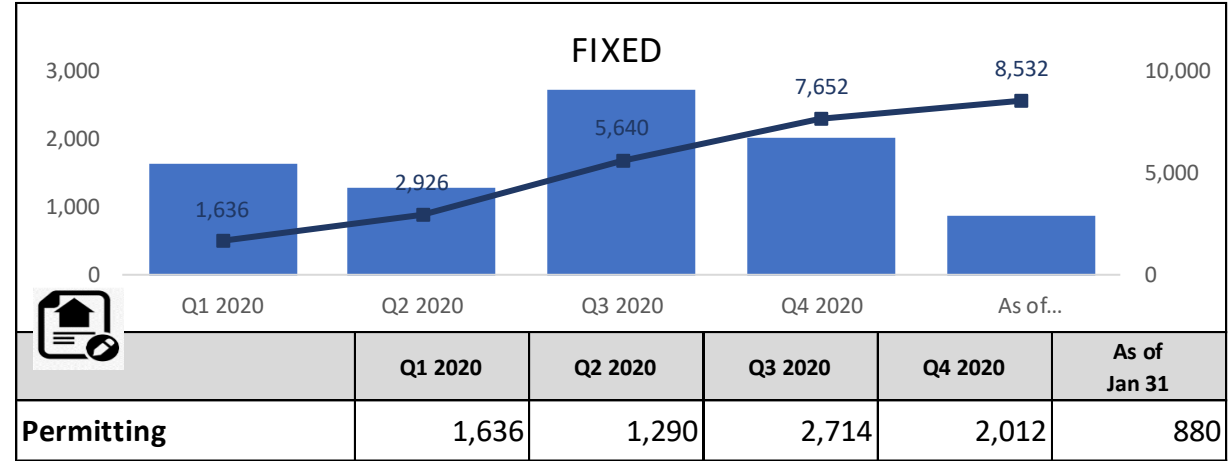
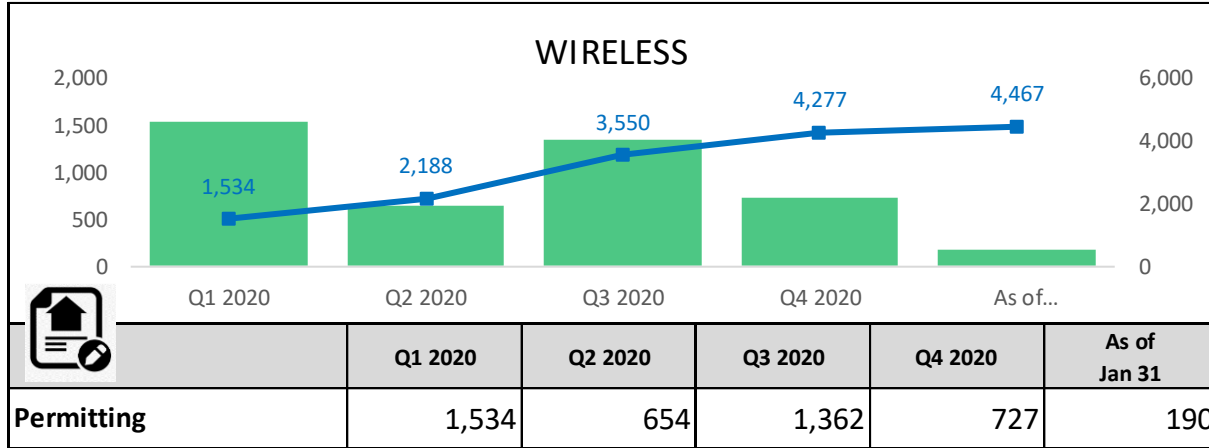
	YE 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	As of Jan 31
Fiber Footprint (cable km)	322,356	338,465	358,699	394,714	429,270	444,012

Activated FTTH Ports (in Millions)



	YE 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	As of Jan 31
FTTH Capacity	2.35	2.43	2.50	2.66	2.88	2.93
Homes Passed	7.23	7.52	7.78	8.27	9.04	9.39

PERMITTING



Wireless permits includes Barangay Resolution (BR), Building Permit (BP), CFEI and Work Permits (WP). Fixed permits includes Barangay Resolution (BR), DPWH, LGU, Right to Attach (RTA) and Right of Way (ROW).

The various programs of the government like Bayanihan Act and ARTA helped accelerate our roll-out by streamlining the permitting process, requiring only municipal permits.

However, there are still a number of barangays that do not honor the JMC Guidelines and continue to require permits. We would also like to seek clarity on the new Bayanihan Act 2 guideline that HOAs may now require consent contrary to the ARTA directive.

OOKLA GLOBAL SPEED INDEX MOBILE: ASIA

- PHILIPPINES Ranks 110th (+1) out of 139 in Global Ranking while it ranks 34th in Asia with speeds of 18.49Mbps
- SMART would have ranked 28th in Asia behind Russia with average speeds of 23.1Mbps

OOKLA GLOBAL SPEED INDEX

Speed Category Month Year Global Rank (gr...) DL Speed (Mbps) COUNTRY Region1

Map: Download Speed

DL SPEED | Mobile



COUNTRY	Global Rank	Global Rank Delta ..	Rank of DL Spee..	November 2020
UNITED ARAB EMIRATES	1	1	1	170.30
SOUTH KOREA	2	-1	2	166.70
QATAR	3	1	3	159.66
CHINA	4	-1	4	148.12
SAUDI ARABIA	8	-	5	99.34
SINGAPORE	16	-2	7	71.32
TAIWAN	19	-	8	67.17
JAPAN	37	14	11	47.09
THAILAND	44	15	13	42.80
MALDIVES	45	8	14	42.46
VIETNAM	63	-	18	33.21
BRUNEI	74	39	21	28.66
LAOS	81	-	22	27.15
REPUBLIC OF THE UNION OF MY...	83	4	23	26.10
IRAN	84	-6	24	25.64
ISRAEL	86	-	25	25.36
MALAYSIA	88	-4	26	24.26
RUSSIA	89	-1	27	23.40
JORDAN	95	-1	28	21.32
KYRGYZSTAN	98	4	29	20.83



OOKLA GLOBAL SPEED INDEX
MOBILE: SOUTH EAST ASIA

- PHILIPPINES Ranks 9th in South East Asia while SMART would have ranked 8th with an average speed of 23.1 Mbps

OOKLA GLOBAL SPEED INDEX

Speed Category Mobile Month Year November 2020 Global Rank (gr..) (All) DL Speed (Mbps) 0.0 100.0 COUNTRY (All) Region1 ASIA (ASEAN)

Map: Download Speed

DL SPEED | Mobile



OOKLA GLOBAL SPEED INDEX FIXED: ASIA

- PHILIPPINES Ranks 103 (+4) out of 176 in Global Ranking while it ranks 29th in Asia with speeds of 28.69Mbps
- PLDT would have ranked 23rd in Asia with average speeds of 34.42 Mbps

OOKLA GLOBAL SPEED INDEX

Speed Category Month Year Global Rank (gr...) DL Speed (Mbps) COUNTRY Region1

Map: Download Speed



DL SPEED | Fixed

COUNTRY	Global Rank	Global Rank Delta ..	Rank of DL Spee..	November 2020
SINGAPORE	1	-	1	241.10
THAILAND	3	2	2	213.14
SOUTH KOREA	12	-	3	168.26
CHINA	18	2	4	154.43
JAPAN	21	2	5	148.01
TAIWAN	24	-	6	143.04
UNITED ARAB EMIRATES	27	2	7	122.86
ISRAEL	28	4	8	121.83
QATAR	40	2	10	97.39
MALAYSIA	43	-	11	91.40
RUSSIA	48	-2	12	79.21
SAUDI ARABIA	49	-1	13	78.14
VIETNAM	59	-	14	60.81
INDIA	64	2	16	52.02
KAZAKHSTAN	65	-2	17	50.71
JORDAN	66	-2	18	50.69
KYRGYZSTAN	76	3	21	43.63
MONGOLIA	82	-9	22	41.74
UZBEKISTAN	94	4	23	32.39
TAJIKISTAN	96	1	24	32.17



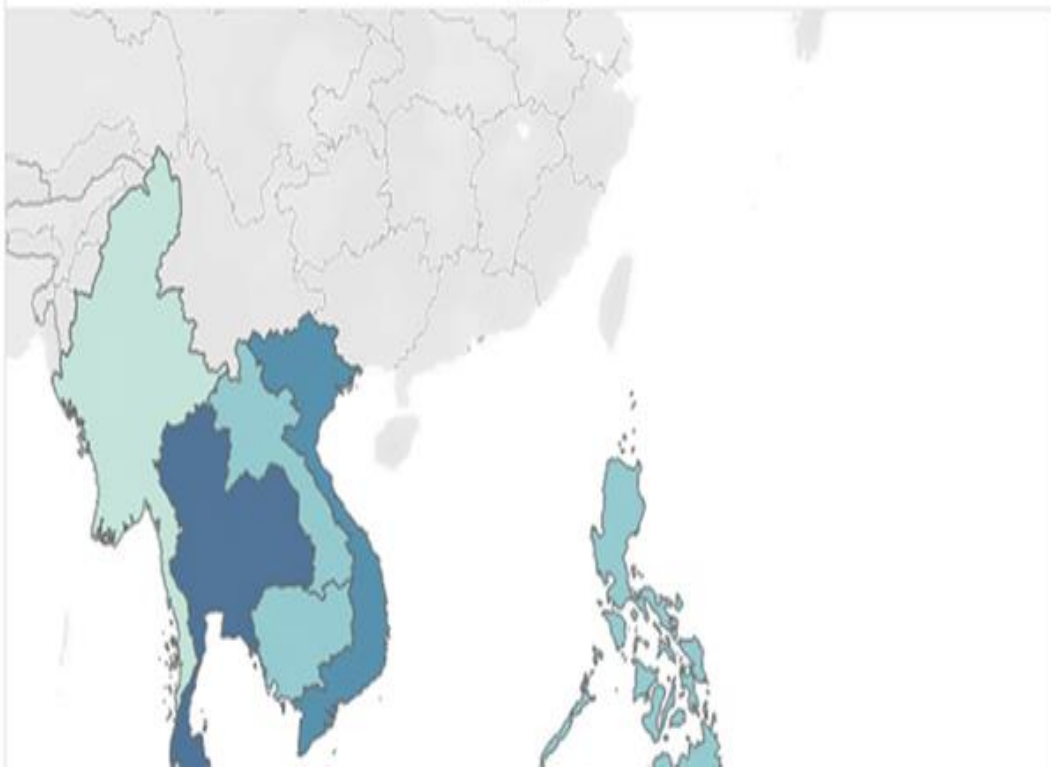
OOKLA GLOBAL SPEED INDEX
FIXED: SOUTH EAST ASIA

• PHILIPPINES ranks 6th in South East Asia and PLDT would have ranked 5th with speeds of 34.42 Mbps

OOKLA GLOBAL SPEED INDEX

Speed Category: Fixed | Month Year: November 2020 | Global Rank (gr...): (All) | DL Speed (Mbps): 0.0 - 100.0 | COUNTRY: (All) | Region1: ASIA (ASEAN)

Map: Download Speed



DL SPEED | Fixed

COUNTRY	Global Rank	Global Rank Delta ..	Rank of DL Spee..	November 2020
SINGAPORE	1	-	1	241.10
THAILAND	3	2	2	213.14
MALAYSIA	43	-	3	91.40
VIETNAM	59	-	4	60.81
LAOS	101	2	5	29.47



Problem Areas

1. Some LGUs are imposing unjust, excessive, oppressive and confiscatory regulatory fees. They use the non-payment of these regulatory fees to withhold issuance of building and/or other local permits.
 - 2.1. Some LGUs require that permit applications should be approved by the city/municipal council.
 - 2.2. The ordinances that require Special Use Permit (SUP) before telcos can secure a building permit are still in effect. A few are even collecting unreasonable fees.
- 3.1 Some barangays insist that telcos should apply for resolution, instead of barangay clearance, which may only be secured after public hearings.

Department of Human Settlement and Urban Development (DHSUD)'s Department Order No. 2020-009 on Revised Locational Guidelines, requires barangay clearance in lieu of barangay resolution.
- 3.2 Some barangays refuse to issue clearance/resolution due to telcos' failure to secure neighbors'/HOAs' consent.
- 4.1 Some HOAS are still objecting/opposing the construction of telecommunications towers within their subdivisions despite the fact that there are no other available or suitable sites within the coverage area except the subject properties and said location will best serve the purpose of interconnectivity, effectively and efficiently.

4.2 HOAs are collecting excessive fees (eg. business clearance fee, profit sharing agreements) some of which are recurring. These fees if not paid would deny us access to do installation, repair and maintenance works within the subdivision/
village premises.

5. DPWHs Department Order Nos. 73 (s. 2014) and 26 (s. 2011)

6. Some LGUs are requiring telcos to remove overhead cable connection and to place them underground using fiber optic and to fix or remove dangling cables and dilapidated poles, prior to issuance of permit

7. A few LGUs are implementing one pole policy, favoring specific telcos in violation of competition laws.

8. Several pending applications for Special Land Use Permits (SLUP) and Special Use Agreements in Protected Areas (SAPA) with DENR.

9. NCIP has a long and tedious process on securing permits.

10. Some LGUs are withholding permits due to non-payment of real property tax on machineries and local franchise taxes despite the exemption granted to telcos pursuant to their franchises and existing laws.

Massive Network Investments will
continue

P260 billion
in the past 5 years

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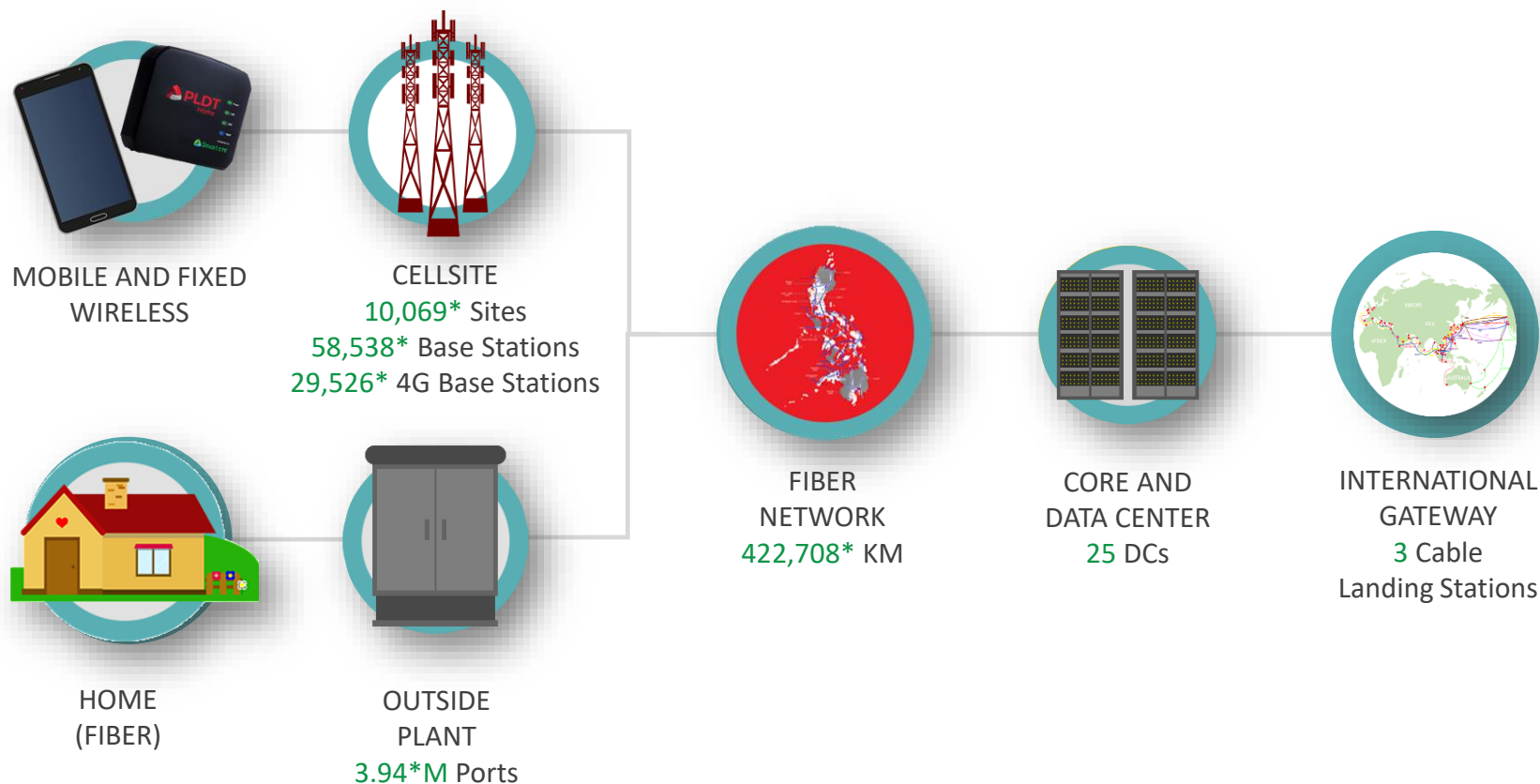
P73 billion
in 2019 alone

45% of total service revenues

Up to P92 billion
In 2021



Wireless population coverage: **96%** of PH
with an average download speed of **23 Mbps****



Present in **95%** of
cities and
municipalities

Metro Manila: **32.8**
Mbps average
download speed

*as of November 2020

**according to Ookla

To elevate PH to Global Standard

MOBILE

Minimum Average Broadband Speed

- 2021: Metro Manila and key cities at 30Mbps*
- 2022: 51% population coverage at 60Mbps**
- 2023: 70% population coverage at 60Mbps**
- 2024: 80% population coverage at 60Mbps**
- 2025: 84% population coverage at 60Mbps**

**30Mbps using LTE-A CA device on LTE network*

***60Mbps using 5G capable device on 5G network*



FIXED

- Minimum Average Broadband Speed of **20 Mbps**
- Legacy DSL **Copper Subscribers** **migrated** to Fiber and Fiber-like services
 - 18% end of 2020
 - 85% by end of 2021
 - 100% by mid of 2022

Newer Devices = Faster Speeds

Leading in Independent Studies



30.68
Mbps

Fixed Network:
PLDT's Average
Download Speed of
30.68 Mbps is higher
than the PH average
of 26.08 Mbps



PLDT-Smart is PH's
**fastest fixed and
mobile networks** for
the first six months
of 2020 according to
Ookla®.



19.45
Mbps

Wireless Network:
Smart's Average
Download Speed of
19.45 Mbps is higher
than the PH average
of 16.89 Mbps



Umlaut: Smart wins
'Best in Test' award.
Best-rated
broadband **coverage,**
download and
latency experience.



Smart garnered a
video experience
score of 42.2--
**better than
competition and
national average.**

THANK YOU

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