
Improving Connectivity in the Philippines: A Work in Progress



Globe

Our Vision

We see a **Philippines** where **families'** dreams come true, **businesses** flourish, and the **nation** is admired.

Our Mission

To do our part, we create **wonderful experiences** for people to have **choices, overcome challenges**, and discover new ways to **enjoy life**.

Our Purpose

In everything we do, we **treat people right** to create a **Globe of good**.

A partner of the nation in the “New Normal” by providing Connectivity and Care

- Internet connectivity needs served thru Globe Mobile, Broadband, and Free GoWiFi services. Care for our frontliners has also been a part of our response to the crisis by donating PPEs, face masks, face shields and access to COVID-19 test kits

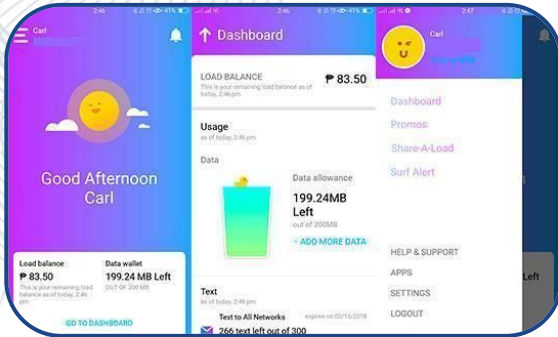


Globe helps LGUs cope with COVID-19

Pivot to the “New Normal”

The need for the Philippines to become a digital nation has never been more pronounced than during this pandemic. While the community quarantine has prompted many Filipinos to remain at home, people turned to digital technologies to cope with the challenges and continue managing their daily lives. This has accelerated the adoption and the move to digitalization at a speed that would not have been achieved under normal conditions

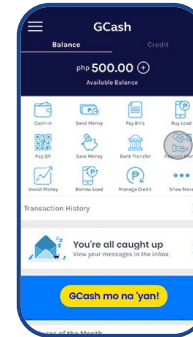
With the customers’ safety, and the public in general, as its utmost priority, Globe has offered services that minimize their exposure to the deadly respiratory disease. These include digital channels such as GlobeOne, Globe At Home and GCash.



GlobeOne App



Globe At Home



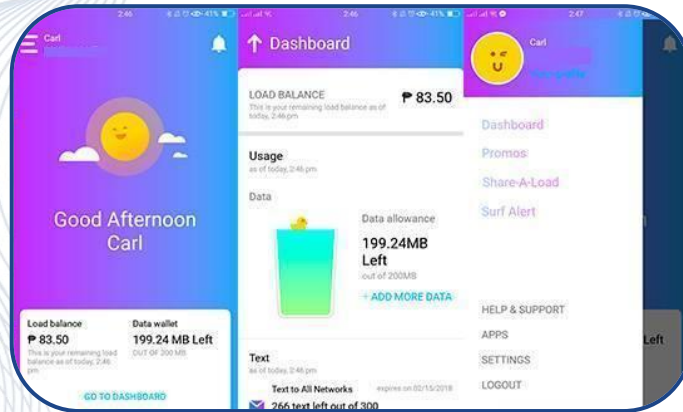
GCash



Pivot to the “New Normal”

GlobeOne App allows Globe Postpaid, Globe myBusiness, Prepaid, and TM customers to monitor their account, track their usage, request for service modification, pay their bill, as well as monitor and redeem their Globe Rewards. Prepaid customers can also purchase load and register to promos.

By using these channels and apps, **customers can track data usage, pay bills, or registering to promos, perform basic troubleshooting using the app and request for an onsite visit without leaving their homes..**



Advocates Online Education and Online Health Consultations

- Globe has ongoing consultations for possible collaboration with the Department of Education to boost Distance Learning



- Globe is one with the Department of Health to encourage Filipinos to use Telemedicine for their medical consultation needs:



Energizes Online Businesses and Cashless Transactions

- Encourages Fintech use and promotes a cashless society thru GCash to support physical distancing using online apps in conducting business in the new normal



Government Employees



Citizens



Merchants



Retailers



There is a need to continue to build new network infrastructure to support the digital transformation of the Philippines



1. Digitalization requires reliable connectivity
2. Cell sites provide enhanced signal penetration into your homes and improved Voice, Data, and SMS services
3. More cell sites results to faster internet speeds and better digital experience.

Despite network improvements, The Philippines still has a long way to go to match benchmark countries Thailand and Vietnam.

TALE OF THE TAPE: PH vs VN vs TH

Kahit na may kakulangan pa ng mga cell site at government investments sa telekomunikasyon, hindi nalalayo ang bilis ng internet sa Pilipinas kung ikukumpara sa Vietnam at Thailand.

	 PHILIPPINES	 VIETNAM	 THAILAND
Ave. Mobile Download Speed ¹	22.5 Mbps	34.51 Mbps	93.1 Mbps
Internet Users ²	73M	68M	52M
No. of Towers ³	17,850	90,000	52,483
Users per tower	4,090	756	991
Government Investment ⁴	USD 0	USD 820M	USD 343M

Sources:

1 - Ookla Global Speedtest Index December 2020

2 - We Are Social - Digital 2020 report

3 - TowerXchange's analysis of the independent tower market in Asia

4 - NTC's report to the Malacanang, Dec. 2020

Source: Yugatech

2020 Network Builds Summary

PERMITTING EASED UP WITH ARTA JMC AND BAYANIHAN 2

1,857

Permits Issued from
July - Nov. 2020

GLOBE EXCEEDED ITS SITE ROLLOUT AND UPGRADE TARGETS

1,100 ▲ 1,300

FY 2019

FY 2020

New cell sites built by end of 2020
18% higher vs FY 2019

10,135 ▲ 11,500+

FY 2019

FY 2020

Sites upgraded to 4G/LTE
14% higher vs FY 2019

SERVICE IMPROVEMENTS

in call, text and data services

1,098

cities and municipalities

80

provinces

MORE AGGRESSIVE FIBERIZATION

+275%

FTTH Rollout FY 2020 vs FY 2019



1,045

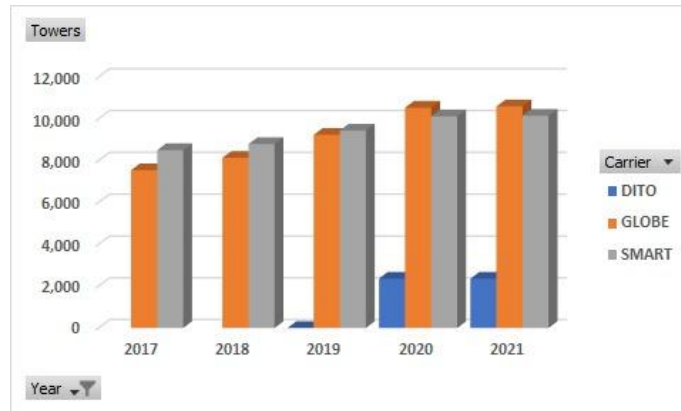
sites in Metro Manila, Rizal, Cavite, Laguna,
Bulacan, Visayas, and Mindanao cities.



Globe

Total PH Industry Cell sites

Globe continues to lead the charge in building more cell sites across the country with 10,596 cell sites nationwide!



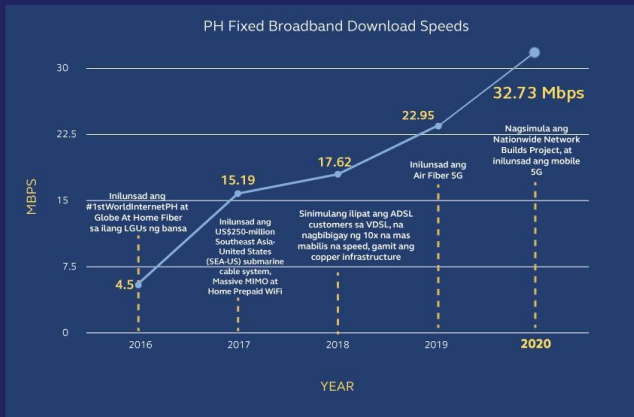
Towers Carrier				
Year	DITO	GLOBE	SMART	Cum. Total
2017		7,546	8,505	16,051
2018		8,135	8,798	16,933
2019	3	9,235	9,441	18,679
2020	2,360	10,535	10,121	23,016
2021	2,360	10,596	10,150	23,106

Source: NTC

Network Improvements

PHILIPPINES INTERNET SPEED CONTINUES TO IMPROVE*

PABILIS NANG PABILIS ANG INTERNET SPEED NG PILIPINAS SA NAKALIPAS NA 5 TAON



32.73 Mbps

Ave. download speed for fixed broadband as of Jan. 2021*

25.77 Mbps

Ave. download speed for mobile as of Jan 2021*

▲ **16%**

Improvement in average video experience 2H 2020 vs 2H 2019 Opensignal. **Global average improvement at 5.8%.**

▲ **2.5%**

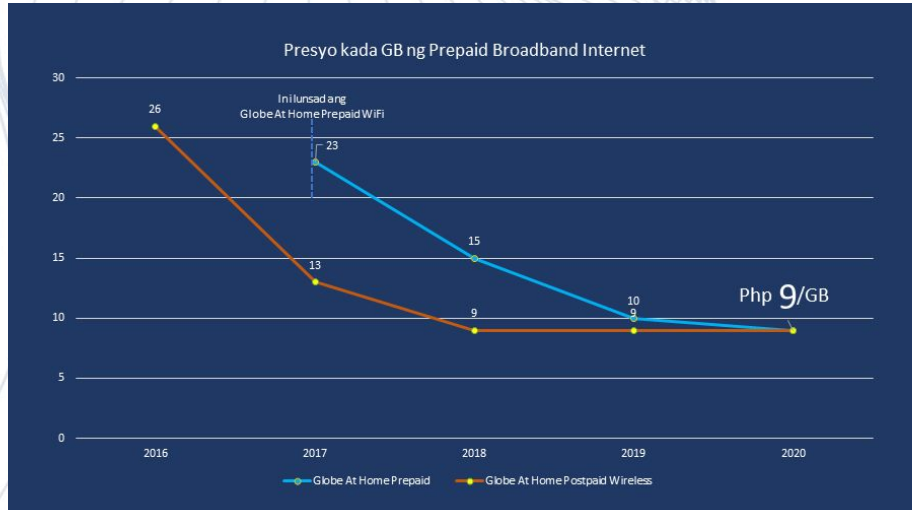
Improvement in voice app experience 2H 2020 vs 2H 2019 Opensignal. **Global average improvement at -0.2%**

Sources:

*Ookla Global Speedtest Index






Internet Affordability Improvements

COST OF ACCESSING THE INTERNET HAS IMPROVED THROUGH THE YEARS, AND IS IN FACT CHEAPER COMPARED TO NEIGHBORING ASIAN COUNTRIES



Price per GB of Globe Prepaid Broadband Internet

MOBILE PREPAID PROMOS

COUNTRY	 TH	 SG	 ID	 PH Globe	 MY
Price (Php) PER GB	190.59	35.6	32.76	11.25	4.86

Meron na ring mas sulit na **Go promos** sa Globe Prepaid na may **mas malaking data allocation** at pwedeng gamitin sa lahat ng websites at apps.

Price per GB of Globe Prepaid Mobile Internet

Ambition for 2021

**WE WILL RAMP UP OUR INVESTMENTS TO PUT UP MORE THAN 2.5X FIBER TO HOMES
AND OVER 2000 NEW CELL SITES**

1 Million

FTTH lines, 2.5x of 2020
target

Aggressively **roll out 5G**
to more cities and
municipalities

Over 2000

New cell sites, including IBS
and towercos

Improve voice services with
VoLTE and VoWiFi for clearer
voice calls, faster call setup, and
near zero dropped calls

Php 70B

CAPEX by 2021 subject to Board approval

Towercos to address the need for more cellsites

Telco tower builder says completes 5th common tower, Globe to get first dibs

ABS-CBN News

Posted at Feb 23 2021 11:09 AM

MANILA - A company that builds telco towers that can be used by different telecommunications firms said it completed its first "build-to-suit site" in Cavite, which will initially be used by Globe Telecom.

Business Companies

Iti completes first shareable tower in PHL

By LORENZ S. MARASIGAN | FEBRUARY 23, 2021



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More companies eye building of common towers: DICT

By Raymond Carl Dela Cruz | September 3, 2020, 6:21 pm

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MANILA – More tower companies are showing interest in building common towers in the country according to the Department of Information and Communications Technology (DICT) on Thursday.

In a statement, the DICT said it has received letters of intent from 13 tower companies asking to register as independent tower companies (ITC) as part of the DICT's push to build shared or common towers for the rollout of better internet service in the country.

"This was a welcome improvement to the Department's existing agreements with the 24 tower companies, which are mostly foreign-owned," the DICT said.

To help ease their registration and to assist with permitting requirements, it has also launched an online portal to facilitate the digital application and registration of interested ITCs.



(Photo courtesy of Globe Telecom)

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PCCI, other biz groups vow full support to e-commerce roadmap

Cebu City collects P7.3-B taxes in 2020

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Further economic reopening eyed to address unemployment

5G data traffic up 24x in February: Globe

TELECOMMUNICATIONS

23 firms accredited for common tower program

By: **Miguel R. Camus** - Reporter / @miguelrcamusINQ | Philippine Daily Inquirer / 05:18 AM September 18, 2020

The FACTS about cell sites



No health risks from cell towers

"Studies to date prove no indication that environmental exposure to RF (Radio Frequency) fields such as from base stations, increases the risk of cancer or any other disease."
- World Health Organization, October 2015



Like FM radio waves, and visible light, they are forms of non-ionizing radiation. This means they **cannot** cause cancer by directly damaging DNA.



Why does INCIRP classify cell tower radiation as 2B - Possibly Carcinogenic if it is not cancerous?

Radio Frequencies from cell sites are already placed below the "ban" category which means it is deemed **safe**. RF from cell-sites are rated "2B" which peanut butter and talcum powder, basic cleaning household chemicals are also included.

Did you know...



The intensity of RF radiation from cell sites are less than 1/1000th of those from mobile phones and are generally much less than from local radio and TV stations.²



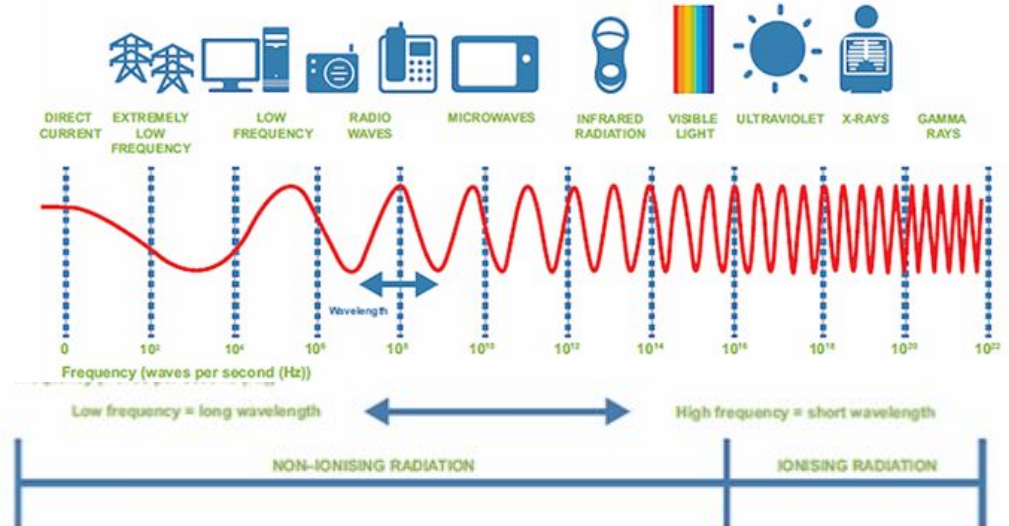
The Department of Health (as commissioned by the NTC) controls and grants permits to install cell towers and makes sure telcos abide by set standards through close monitoring after installation.



Many public venues, like theme parks, hospitals, schools, and offices globally have cell sites and distributed antenna systems situated in their immediate area.

The Electromagnetic Spectrum

shows that non-ionizing items such as televisions, radios, cellphones and cell towers are not dangerous compared to the ionizing infrared, ultraviolet rays (tanning stations), x-rays, and of course gamma rays (nuclear).





Globe

Thank you.

GCash nears unicorn status with fresh investment from Bow Wave



raised over USD 175 million in fresh capital from existing shareholders and Bow Wave in multiple tranches with the last tranche at a post money valuation of **close to USD 1 billion**



Globe



33M

Registered Users

3.7x

Growth in Active Users

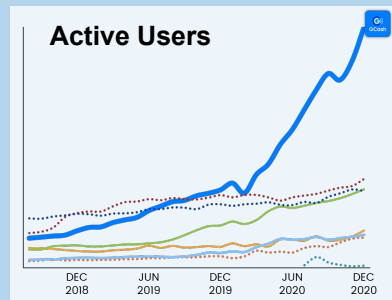
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Gross Transaction Value

4x

Growth in Revenues

#1 FINANCE APP
(JAN 2020 – DEC 2020)*



Comparison of three Philippine Cities

Data Experience	Good data experience	Moderate data experience	Uplift experience
Number of Sites	33	31	16
Additional sites to needed to make great data experience	13	27	22
Land area population	Small land area w/ small population	Medium-sized land area but with big population	Large land area but with medium-sized population