

Broadband China Strategy Experience and OBOR Strategic Initiatives Study

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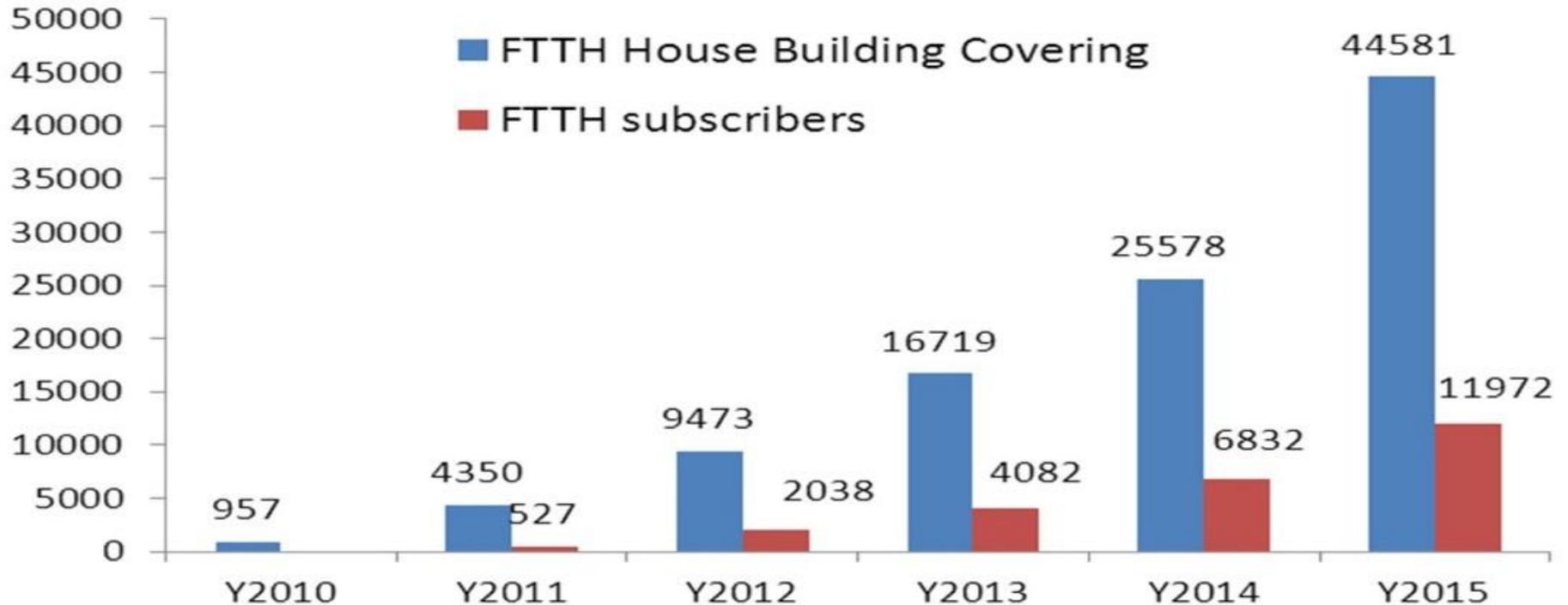
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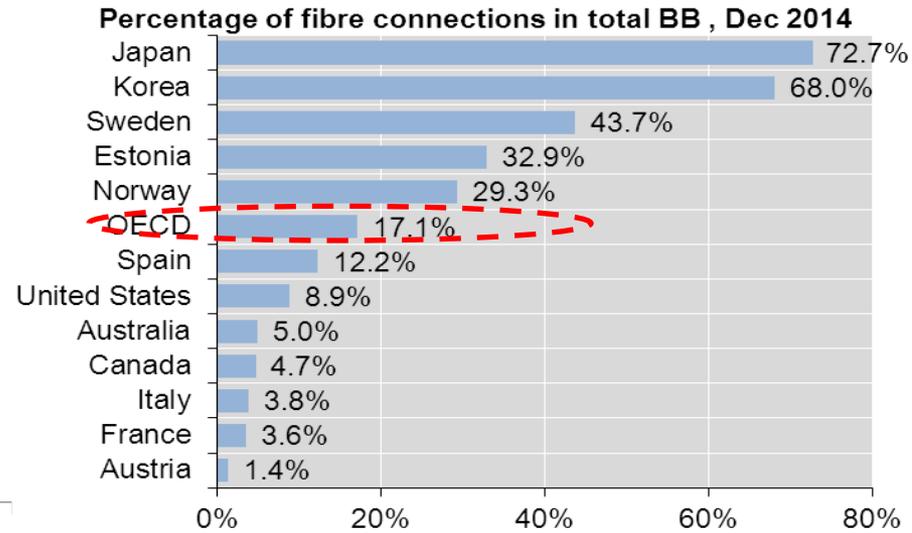
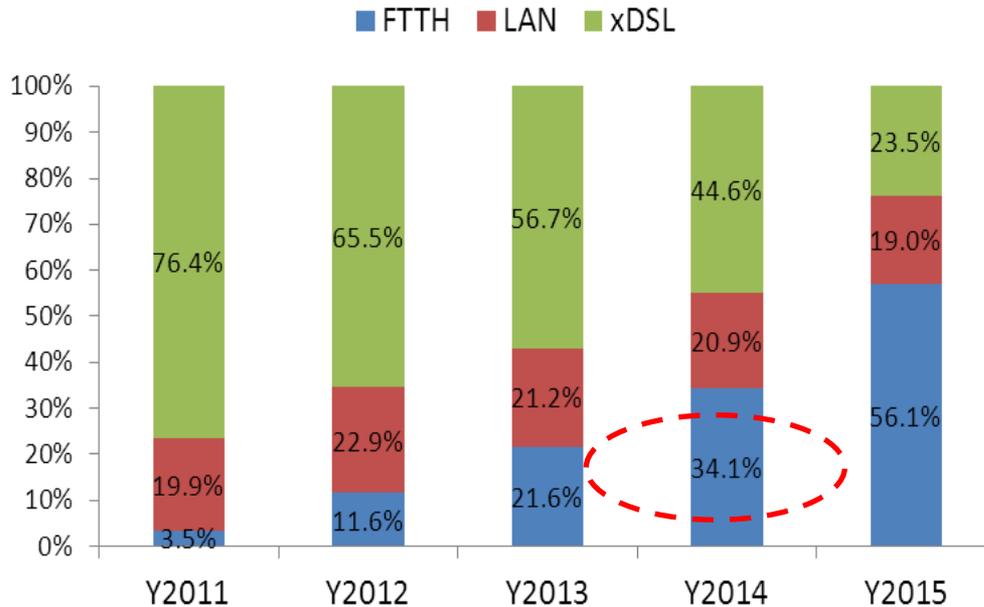
Fixed broadband—Network construction speed up

Rapid coverage of FTTH and high-speed growth of FTTH subscribers

- **446 million households** have been covered by FTTH
- FTTH subscribers reached to **119.72 million households**, accounting for **56.1%** of total fixed broadband subscribers.



Fixed broadband—FTTH subscribers grow significantly



Proportion of FTTH outstripping the average level of OECD countries

- According to OECD, the average proportion of fiber users in OECD countries was 17.1% in Dec 2014 meanwhile that in China was 34.1%. By the end of 2015, the proportion of FTTH among total fixed broadband user reached 56.1%, almost among the leading group in the world.

Note: OECD statistics, fiber users include FTTH and FTTB

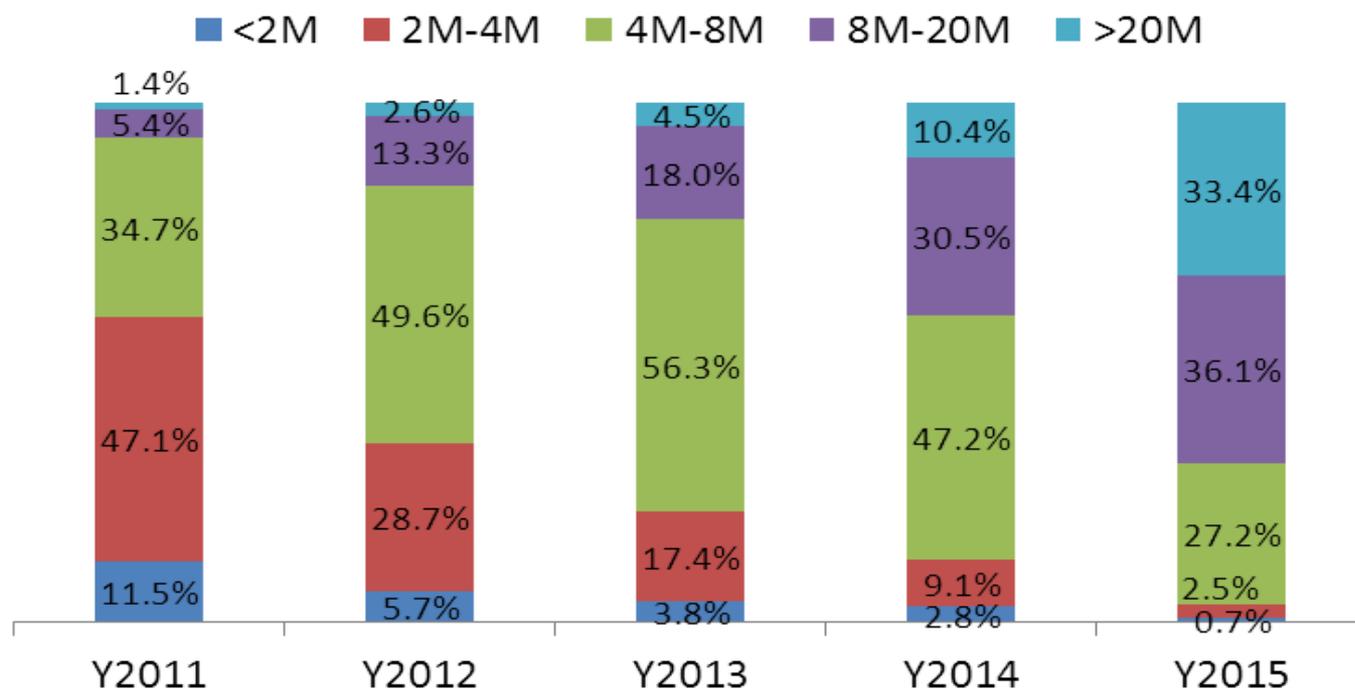
Percentage of fibre connections in total broadband among countries reporting fibre subscribers, Dec 2014

Fixed broadband—The access speed was promoted constantly

Main speed for broadband access moving forward from 4 Mbit/s towards 8 Mbit/s

- By the end of 2015, proportion of 4M and above accounted for **96.8%** and that of 8M and above accounted for **69.5%**, which shows that Chinese subscribers are entering into a high speed era.

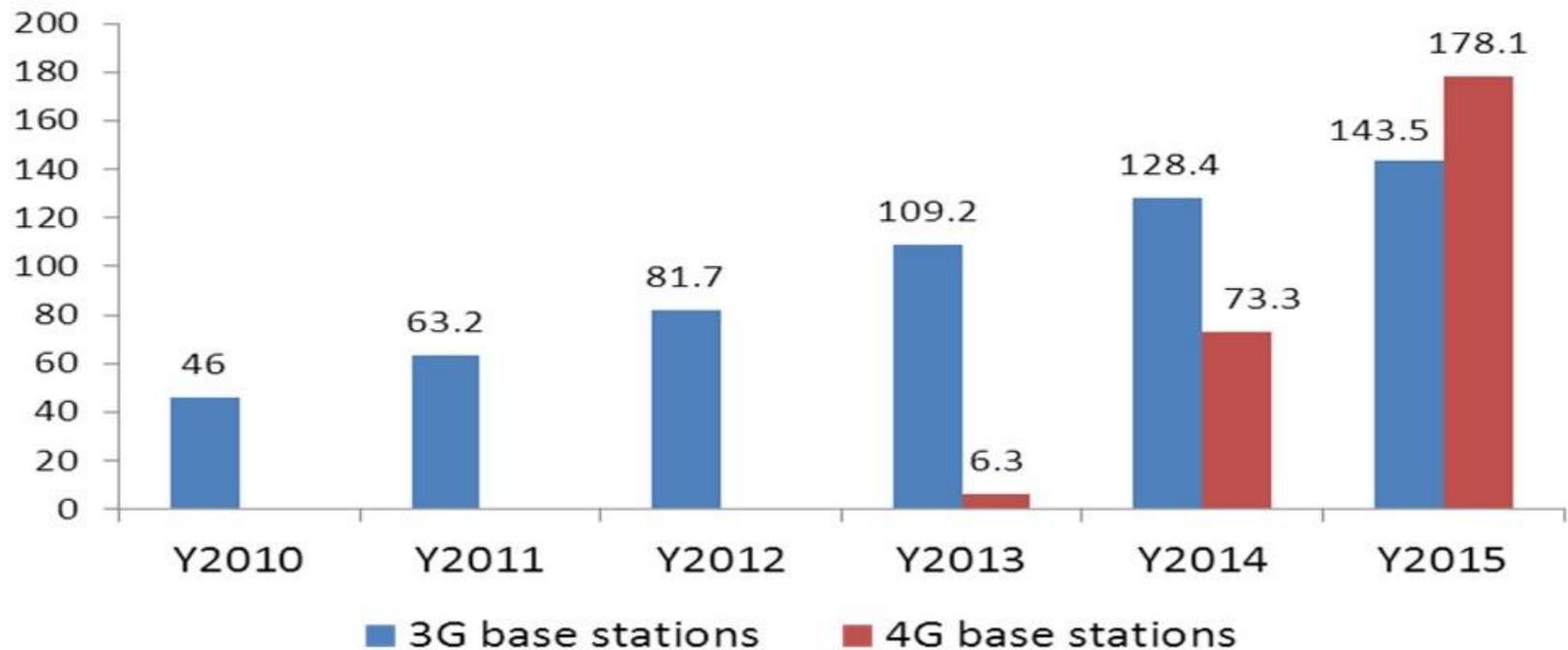
subscriber
proportion in
different rate
levels



Mobile broadband—Network construction accelerate

After the release of 4G license in Dec. 2013, the deployment of LTE accelerated.

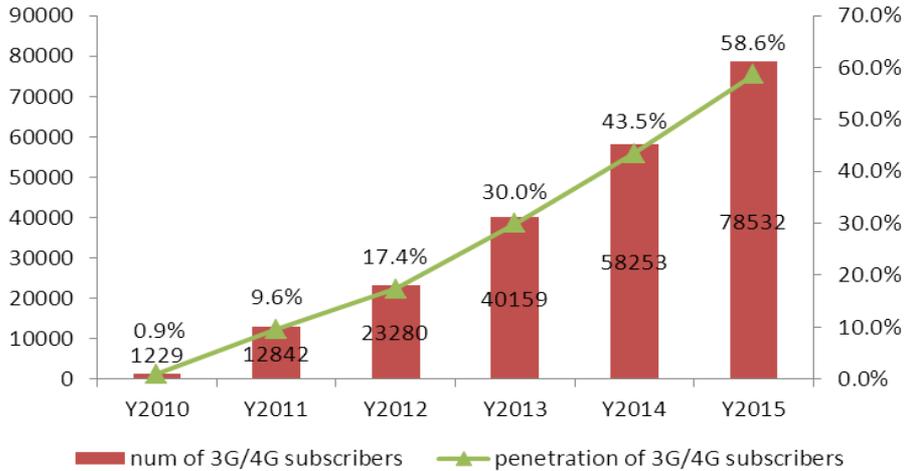
- By the end of 2015, **Number of 3G and LTE** base stations reached to **1.44 and 1.78 million** respectively, accounting for **68.7%** of total.
- The **4G** base station number has **surpassed** that of **3G**.



Mobile broadband—Proportion of broadband subscribers rises quickly

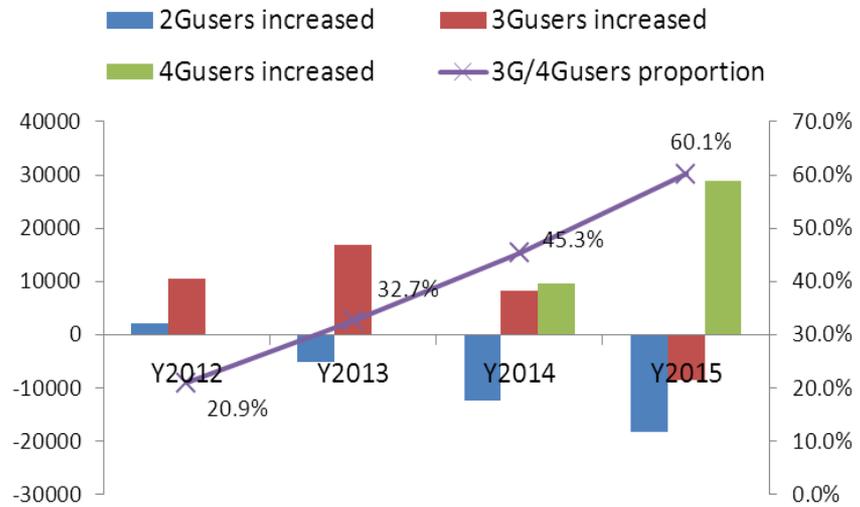
2G/3G subscribers are expediting the migration to 4G.

3G/LTE subscriber and penetration



By the end of 2015, subscribers of 3G/4G surpassed **780 million** households, with the penetration rate up to **58.6%**.

New increased mobile user contrast



The growth of 3G subscribers in 2015 is **-86 million**. The 4G subscribers are replacing 3G and 2G subscribers obviously. By the end of 2015, the users of LTE reached to **38.62 million** households.

Internet applications develop prosperously

Development of Internet applications shows an overall upward trend

- The usage of **instant messaging** keeps on going up to 90.7%.
- The development of **mobile business applications** bursts out . Its annual growth rate

Application	2015		Annual growth rate
	Subscriber(M)	utilization rate	
Instant communication	624,08	90.7%	6.2%
Search engine	566,23	82.3%	8.4%
Network news	564,40	82.0%	8.8%
Network music	501,37	72.8%	4.9%
Network video	503,91	73.2%	16.4%
Network game	391,48	56.9%	7.0%
Network shopping	413,25	60.0%	14.3%
Online payment	416,18	60.5%	36.8%
Network literature	296,74	43.1%	1.0%
Online bank	336,39	48.9%	19.2%
Email	258,47	37.6%	2.7%

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