

Geo:  
Provider of Open Access Fibre Networks

Chris Smedley, Chief Executive



# Agenda

- **Geo, at a glance**
- The current investment climate
- What makes fibre so special?
- Fibre: it's already working

# Geo at a glance

Geo delivers point-to-point and bespoke fibre network services to Service Providers, Telecoms Carriers, Commercial Enterprises and the Public Sector.

1999-2002: Networks built by Lattice/Thames Water

2003: Assets acquired by Hutchison Whampoa

2004: Geo launched

2008: Bought by Alchemy Investment Plan; 1st full year profit; no debt

2009: Geo ranks 7<sup>th</sup> in Sunday Times Tech Track 100

2010: Geo welcomes 100<sup>th</sup> customer



# Geo Assets



- 3,000km national optical fibre network
- 100km network in London sewer system
- Tracks the national gas pipeline
  - Newest, non-legacy UK network
  - Highly secure and diverse
- Specialists in construction of new duct & fibre networks (20km/week)
- Access to most other fibre networks
  - Over 500km third party fibre under management

# Customers and Users... a sample



MANCHESTER  
CITY COUNCIL

CBRE  
CB RICHARD ELLIS

OPAL

COLT

sohonet

FUJITSU

CSC  
EXPERIENCE. RESULTS.

nationalgrid  
Wireless

edenbrown



openhosting

vodafone  
tiscali

ERICSSON  
TAKING YOU FORWARD

Carphone Warehouse  
your phone, your way

DentonWildeSapte...

Global Crossing

TeleCity

INTERNET  
ZEN  
LIMITED

LINX

TW  
TaylorWessing

AEG  
EUROPE

exponential-e

PIONEER  
TECHNOLOGY  
ASSURED DATA CENTRE OUTCOMES

cogent  
COMMUNICATIONS  
Optical Internet

NWIX  
THE NETWORK PERFORMS

LANCASTER  
UNIVERSITY

Deutsche Bank

Lloyds TSB Group

vtesse  
NETWORKS



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

BT

Star  
The Business ISP

affiniti  
GET INVOLVED

NETWORK  
FLOW

hp

RBS  
The Royal Bank of Scotland  
Make it happen

GEO.

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## Current Investment Climate

- Government is taking a market first approach
- Access to BT's infrastructure for NGA deployment
- Use of grants and funding: State Aid Guidelines apply
- Improve planning laws and the Code
- Reform rates regime

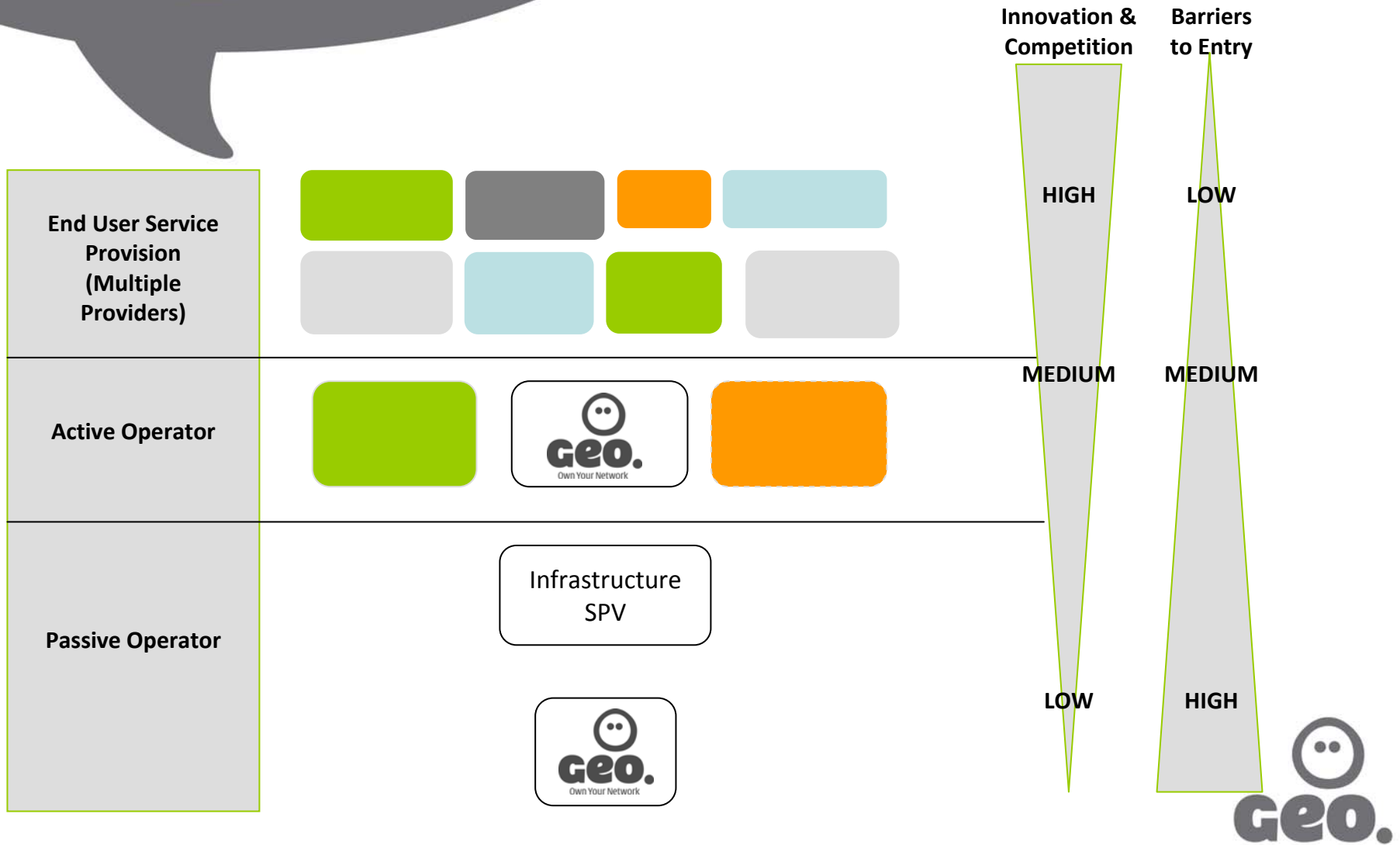
# NGA: the 4<sup>th</sup> utility

*“ICTs and high speed internet are as revolutionary in our lives today as the development of electricity and transport networks were over a century ago”*

Neelie Kroes, European Commissioner for Digital Agenda

- Point to point fibre networks
- Long-term assets
- Future-proofed
- Technology-agnostic
- Uncontended
- Scalable
- Low latency
- Fully symmetrical
- Open Access (at the passive level)

# What is Open Access?



# Benefits of Open Access Networks

- Provides platform for services development
- Encourages innovation and competition
- Promotes sustainable business economies
- Removes the threat of monopolies
- Reduces many costs associated with business set-up
- In line with public sector agenda of open access for all
- Brings UK broadband in line with the rest of the world

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# True NGA: A New World of Services



**High speed symmetrical internet**

**Telepresence (video conferencing)**

**Cloud computing**

**On demand content delivery**

**Virtually unlimited bandwidth**

**Reduced road congestion/  
transport costs**

**Multiple media streams - HD**

**Uncontended upload/download:  
Upload or download a shared  
4Gb video in 46 seconds\***

**Smarter transportation grids**

**In-home health services**

**Local mobile and wireless services**

**Environmental benefits**

**Smart monitoring**

**Smarter energy grids**

**Home-working**

\* FTTH Council Europe 2009



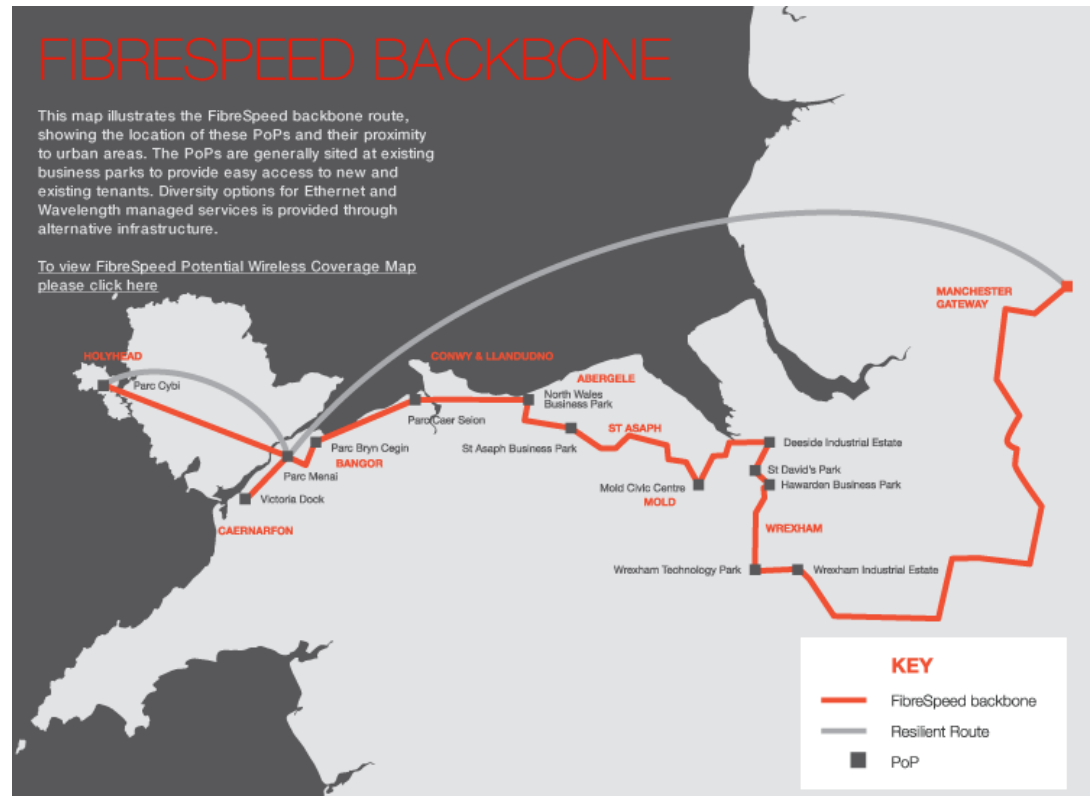
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- What makes fibre so special?
- **Fibre: it's already working**

# FibreSpeed: The Network

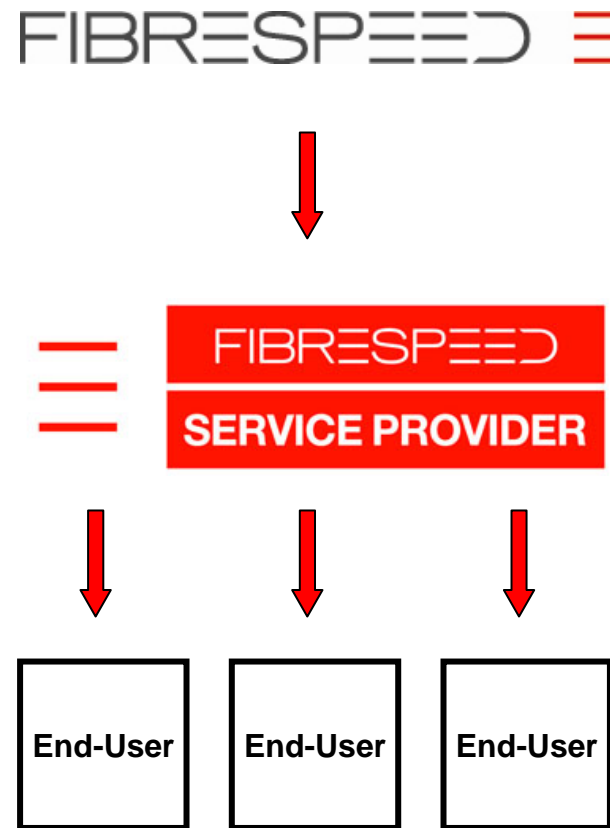
## FIBRESPEED

- Geo won a tender to build and operate a 270km open access network from Manchester to Anglesey
- Funded jointly by European Regional Development Fund, WAG & Geo
- Initial cost: £30m over 15 years
- Build completed in 15 months: now live
- An essential infrastructure for new broadband services



# FibreSpeed: The Business

- Brings infrastructure competition to North Wales
- Pricing benchmarked to SE England
- Sells exclusively to service providers who engage the retail market
- Open access
- Includes “passive” network components
- Ideal model for FTTH development by the public sector
- Consistent with state aid regulations



FIBRESPEED SERVICE PROVIDERS





Thanks you for listening

If you'd like to find out more about Geo, please  
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