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FTTH deployments continue to accelerate

Nordic countries lead the way, IDATE reports

by Kendrick Struthers-Watson
Thu. February 12, 2009

According to the figures released yesterday by IDATE in an inventory commissioned by the FTTH Council Europe, Fiber to the Home and Buildings is still making great strides in Europe in terms of coverage, with some 11.2 million homes passed. Subscriber numbers are also on the rise, even if users are still concentrated in only a few countries.

In Eastern Europe, Russia has taken the lead in FTTH/B deployments and has around 630,000 FTTB subscribers. If player involvement increases, the country will soon become one of the world's largest FTTB markets. Roll-outs in the Middle East are still limited, but IDATE say there is still real potential for FTTH/B to develop there as the key driver is a massive new program in building new housing across the region.

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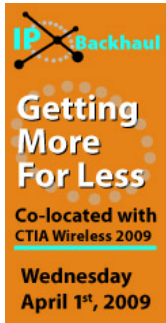
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As in previous years, municipalities and power companies are still very involved in FTTH/B deployments and account for almost 59 percent of the projects. However their share decreased in the second half of 2008 as alternative operators began to make inroads into the market. Some incumbent carriers have also confirmed their FTTH rollout plans, such as Telefonica, and most have now opted for FTTH/B instead of VDSL for new projects. This includes KPN, Swisscom and Belgacom. In terms of subscribers, alternative operators dominate the market with 40 percent of Europe's FTTH/B subscriber base.

By the end of 2008 there were 1.66 million FTTH/B subscribers in the EU and around 11.2 million homes/buildings passed. Interestingly, the number of homes passed increased significantly — by 27 percent — in the second half of 2008 while the number of FTTH/B subscribers rose a little at the slightly lower rate of 25 percent during that period. Seventy-nine percent of subscribers were concentrated in the six countries of Sweden, Italy, France, Norway, the Netherlands and Denmark.

Roland Montagne, head of broadband practice at IDATE said, "The Scandinavian countries, most notably still lead the way in Europe in terms of penetration rate with 44 percent and 65.6 percent respectively; however, Sweden could fall from top spot if the growth rate seen over the last six months in the Netherlands and France continues to rise.

"On the matter of technologies," Montagne continued, "the momentum during the last six months of 2008 has favored GPON even if Ethernet still largely dominates FTTH/B rollouts in Europe, especially in the Nordic countries. This can be attributed to the involvement of power companies such as EnergiMidt in Denmark and Telefonica in Spain."

The deployments in Europe continued to grow, especially in terms of homes passed, but with only around 1.7 million FTTH/B subscribers at the end of 2008. Europe still lags behind the United States and Japan where 15 million joint subscribers are expected.

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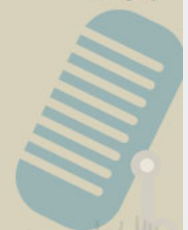


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