

FTTH Council Europe

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www.ftthcouncil.eu

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- Fibre-to-the-home for a sustainable future
- FTTH global market panorama
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FTTH Council Europe

FTTH Council Europe

Organisation

- Founded in 2004, non-profit industry organisation
- More than 120 members
- Members: manufacturers, construction & engineering companies, NPO, academia

Our Vision

- A sustainable future enabled by Fibre to the Home

Our Mission

- To accelerate FTTH adoption through information and promotion in order to enhance the quality of life, contribute to a better environment and increased competitiveness.

Fibre to the home for a **sustainable** future

FTTH is an enabler

- Real speed

- Example, download of 6.5 Gbyte DVD-film:

10 Mbit/s DSL: 1.44 hours



100 Mbit/s FTTH: 8.6 min

- Symmetry

- Example:

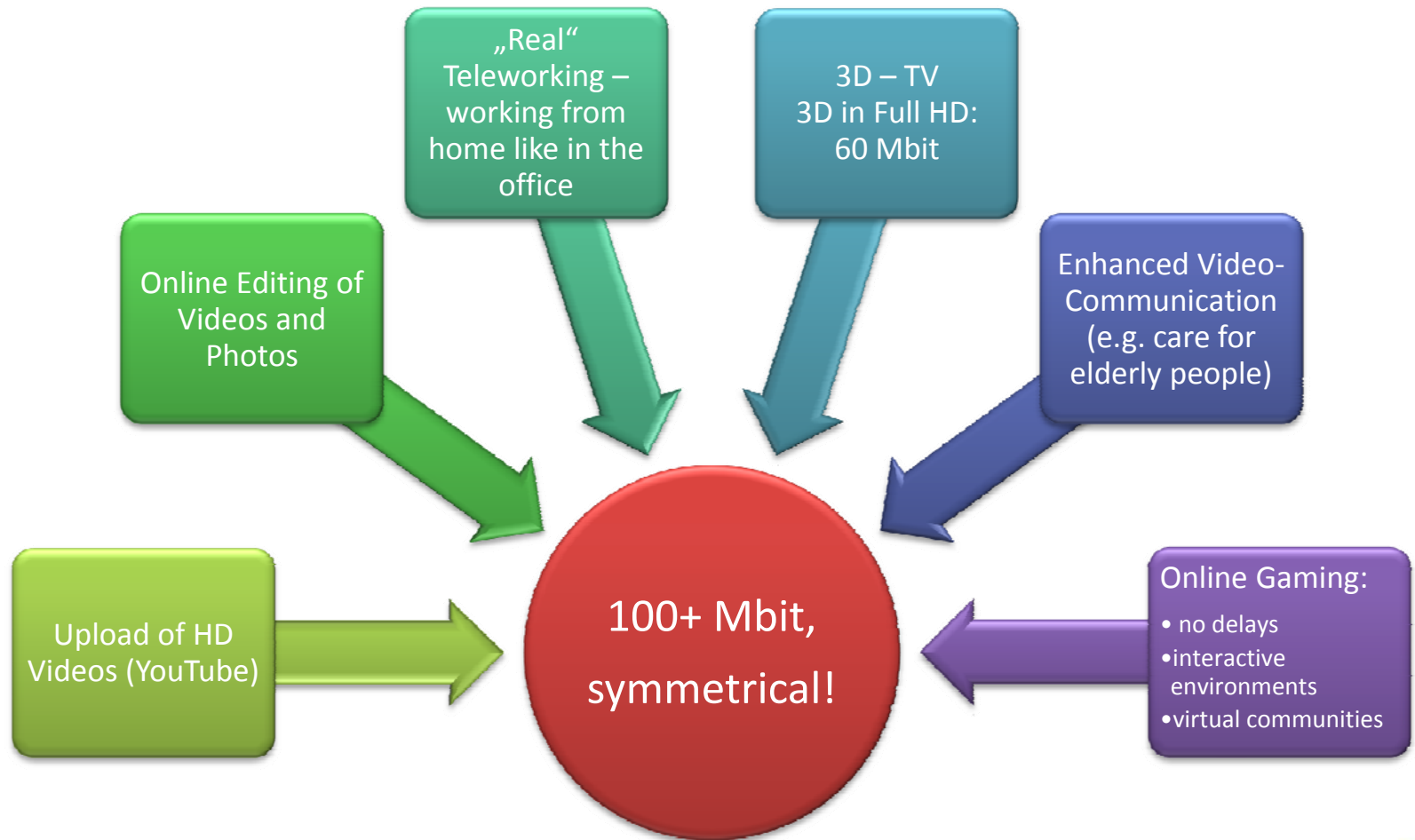
Upload of 300 holiday-photos (700 Mbyte):

- 1 Mbit/s Upstream: 92 minutes
 - 10 Mbit/s Upstream: 9 minutes
 - 100 Mbit/s Upstream: 56 seconds

- Real speed + Symmetry = interactivity
- FTTH allows access to enhanced content & services
- **FTTH improves the way people live and work**

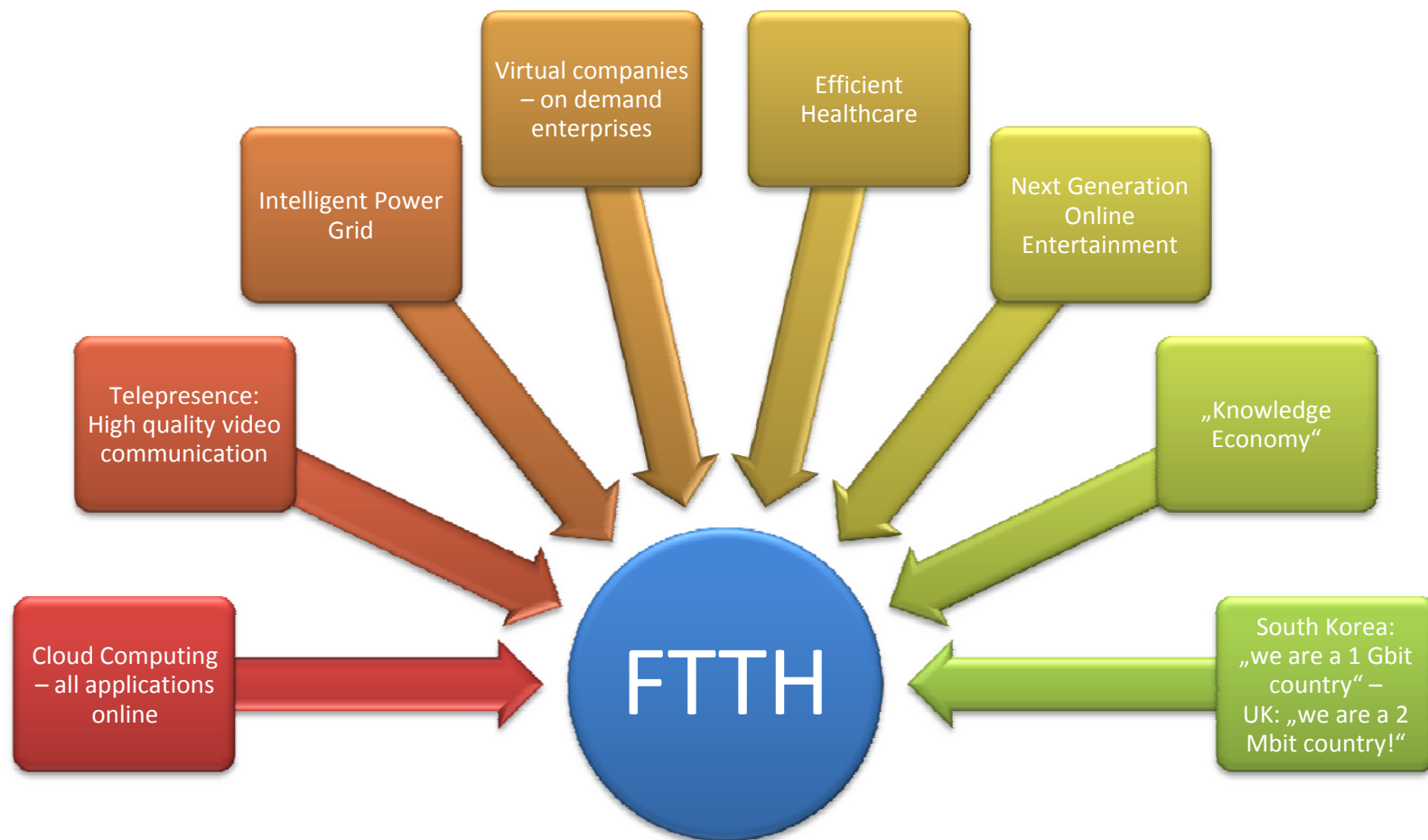
Only FTTH meets the demand for bandwidth

Only FTTH meets demand



Only **FTTH** allows successful business

FTTH for business success



FTTH improves our lives



eGovernment



eLearning



FTTH for a better quality of life & environment

Study by Ovum for FTTH Council Europe:

- FTTH enables users to benefit from real broadband applications, content and services
- FTTH-users are ready to use new services for teleworking, eLearning, etc.
- FTTH-users are more satisfied
- Highest impact in rural areas

Study by PriceWaterhouseCoopers/Ecobilan:

- Using FTTH and FTTH services can save up to CO² equivalent of driving a car for 4,600 km per year – for every household!

FTTH is a key economic driver

- FTTH is a critical driver for the knowledge economy
 - Deployment of FTTH creates jobs
 - New services create GDP growth, not only from ICT industry (entertainment industry etc.)
- FTTH creates business opportunities & competitiveness
 - Operators: increased ARPU (30%!), lower churn-rate, Opex savings
 - Businesses: new ways of working, reduced travel & office rental costs, better time management, more innovation, better competitiveness
 - Regions/Municipalities: retain and attract more businesses & investment, offer cost-efficient services to the community, increase local competitiveness

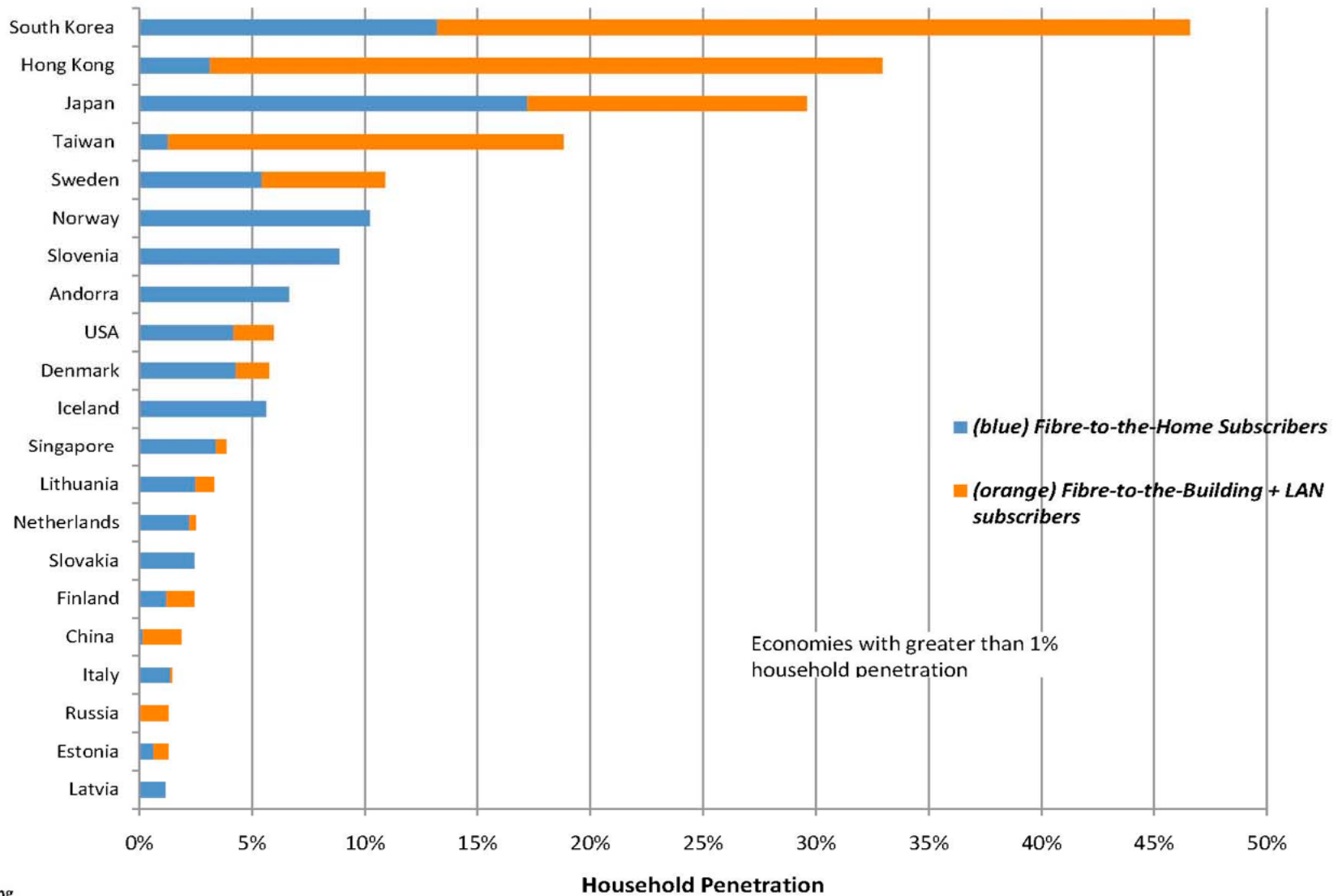
FTTH Worldwide

FTTH Worldwide June 2009



...and FTTH continues to **grow**

Global FTTH/FTTB Ranking, June 2009



FTTH in Portugal

FTTH European panorama from IDATE

IDATE has been commissioned by the FTTH Council Europe to provide a comprehensive overview of FTTH/B deployments in Europe 31 (EU 27 + Norway, Iceland, Switzerland & Andorra) as well as five countries in Eastern Europe (Russia, Ukraine, Croatia, Serbia and Turkey) and 14 countries in Middle East

Methodology used

Desk research

Direct contacts with FTTH players (questionnaires, phone interviews)

Information exchange with FTTH Council Europe members

Direct contacts with IDATE's partners in several European countries

Objectives

To provide a complete summary of the status of FTTH/B in Europe

Identify new projects

Characterize each project: organisation initiating the project, Key parameters & Figures (Homes and Buildings passed), Technical parameters, Financing & Business model

Note: FTTH/FTTB definitions by the Global FTTH Councils

FTTH in Portugal

In Portugal, 3 players are deeply involved in FTTH deployments

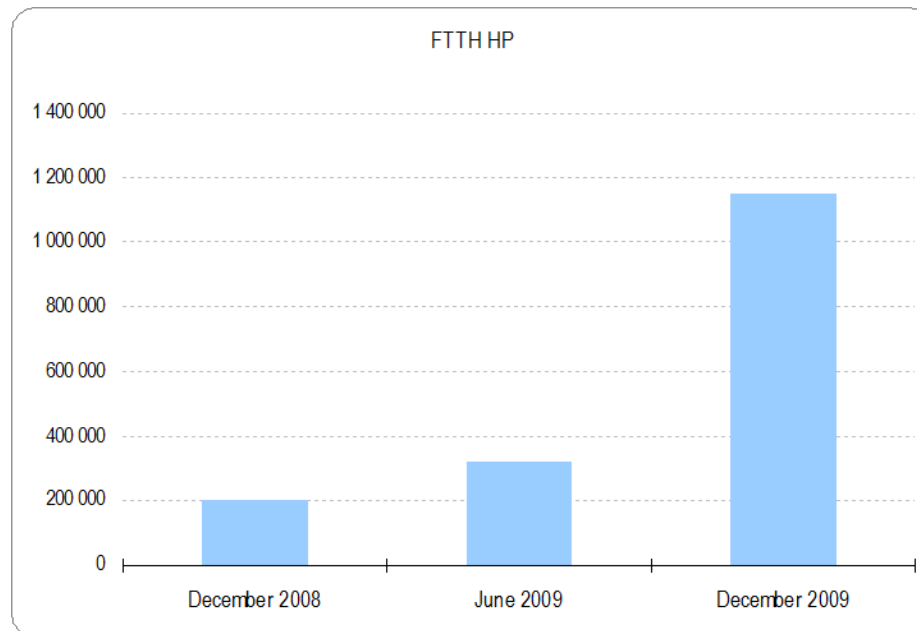
-  Portugal Telecom (FTTH GPON)
-  **SONAECOM** Sonaecom (FTTH GPON)
-  **ZON** (mainly FTTLA as well as FTTB GEPON)

The Portuguese FTTH success story

Very strong increase in Homes Passed

2H2009
+ 259%

YoY
+ 475%



Source : IDATE for FTTH Council Europe (preliminary data)

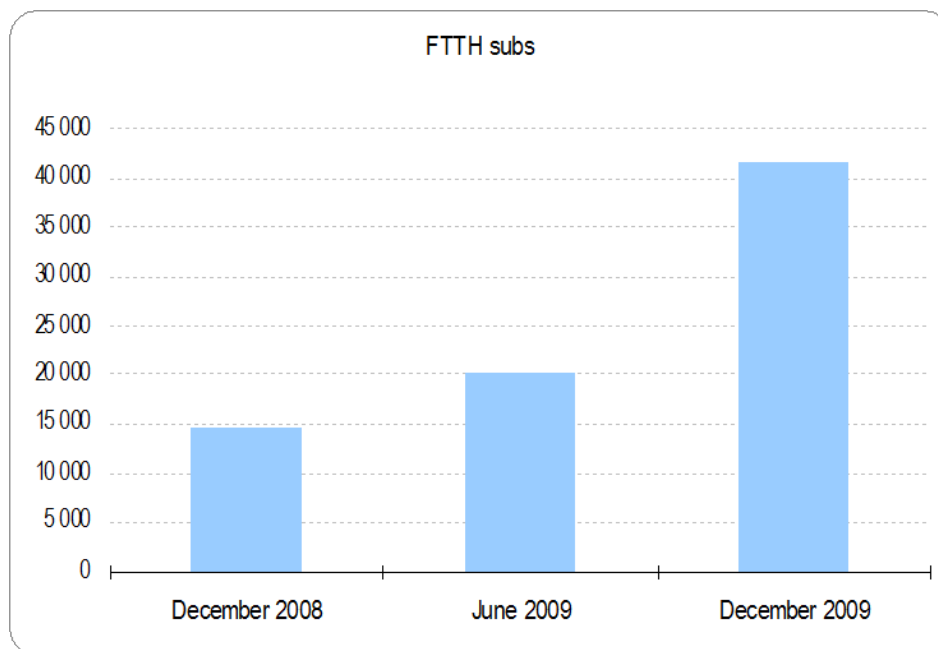
This result, hardly ever seen elsewhere in Europe, unveils the dynamism of Portuguese players

The Portuguese FTTH success story

Same finding regarding FTTH Subscribers

2H2009
+ 108%

YoY
+ 186%



Source : IDATE for FTTH Council Europe (preliminary data)

➡ Portugal makes its entry in the Global Ranking !!!

Join us for the 7th FTTH Conference

FTTH Conference

24th – 25th February 2010

Lisbon – Portugal

Prime Minister Eng. José Socrates in the Opening Session

