

Members



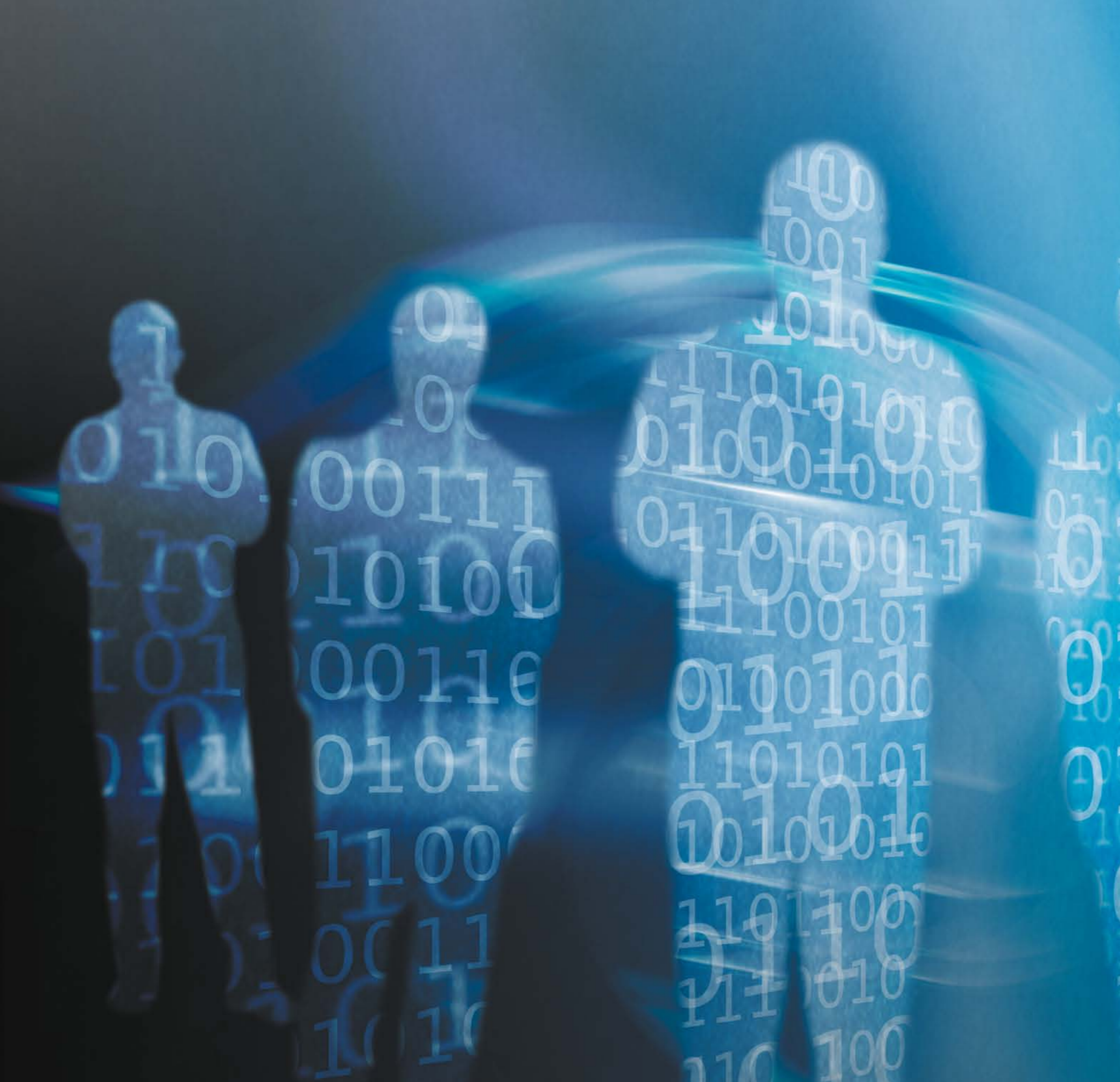
- 3M Telecommunications
- ACOME
- Acreo
- Adtran
- ADVA Optical Networking
- Alcatel-Lucent
- Alexander Pressinger
- AND Solution
- Anritsu EMEA
- Apresa - PLP Spain
- Aurora Networks
- BAM Infratechnik
- Bentley Systems Europe
- Bktel Communications
- Brand-Rex
- braun teleCom
- Broadlight
- Calix
- Camozzi
- Canovate Group
- Capabilities
- CBE
- Channell
- Cisco Systems
- Comptoir des Signaux
- COMSOF
- Condux International
- Connection Technology Systems
- Corning
- CTTS Training
- Dätwyler Cables
- DCT Delta
- Detecon International
- Diamond
- DKTCOMEGA
- Dr. Mohamad Amar
- DSM Desotech
- Duraline
- Dynamic Design
- Eden
- egeplast International
- Elcon Systemtechnik
- EMC Electronic Media Communication
- Emtelle
- Enghouse Networks
- Ericsson
- Esri
- ETD Europe
- euromicron
- EXFO Europe
- Fiberdk
- Fibox
- FibreFab
- Filoform
- FNT
- FOLAN
- Fraunhofer Institut
- Fujikura Europe
- gabo Systemtechnik
- GE
- Genexis
- Geo Data
- Gérard Glaise
- GM Plast
- Hellermann Tyton Data
- Heraeus Quarzglas
- Hitachi Communication Technologies
- Hochschule Furtwangen University
- Huawei Technologies
- Huber+Suhner
- icotera
- IIsintech
- Infotech Enterprises Europe
- INNO Instrument Europe
- INSTITUT MINES TELECOM
- Instituto Politécnico de Viana do Castelo
- Inteno Broadband Technology
- IP.NetCom
- Iskratel
- JDSU
- JO Software Engineering
- John Guest
- Kabelovna Decin Podmokly
- Karl Bauer Consultant
- Kathrein-Werke
- KeyFibre Network Components
- KEYMILE
- KNET
- Langmatz
- Lisonet Technologies
- Map Group (UK)
- Marais Contracting Services
- Mitsubishi Electric
- MP Systems
- NetAdmin Systems
- Nexans
- Nokia Siemens Networks
- NTT Electronics
- Ocilion IPTV Technologies
- OFS
- Opterna
- Opticreach
- Optotec
- Pacific Broadband Networks
- Packetfront
- Paolo Sebben Consultant
- Pengg Kabel
- Plumettaz
- Prysmian Group
- PT Inovação
- Qualcomm Technologies
- Radius Systems
- RAISECOM Technology
- Rala Infratech
- Reichle & De-Massari
- Resulture
- Rittal
- Rotal Networks
- Scheu Netzplanung
- Senko Advanced Components
- Sichert
- Silec Cable
- SPATIALinfo
- Sterlite Technologies
- Sunsea Telecommunication
- TE Connectivity
- Tele-Kabel-Ingenieurgesellschaft
- Telenco
- Teraspan Networks
- Tilgin
- Triax
- TVC UK Holdings
- Twentsche Kabelfabriek
- United Technologists Europe
- Vienna University of Economics and Business
- Wavin
- Webro Cables & Connectors
- WISI Communications
- Zhone Technologies
- ZTE
- Zweicom
- ZyXEL Communications



Fibre to the Home Council Europe

Annual Report April 2012 – April 2013





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Karin Ahl



Hartwig Tauber

A word from **Karin Ahl**

President, FTTH Council Europe

and **Hartwig Tauber**

Director General, FTTH Council Europe

This Annual Report presents the results of a very successful working year 2012/2013. The FTTH Council Europe has made a huge step forward on many topics:

- The FTTH Conference 2013 in London was a huge success. We celebrated the 10th anniversary of the event and gathered more than 3,000 participants. With a new record number of exhibitors and special guests from the film industry, the FTTH Conference was once again a landmark event.
- The investors project has been successful since it started. With the Investors Day in London, two studies on financing of FTTH networks and several high-level contacts with the investors world, the FTTH Council Europe was able to establish itself as a reliable source for information for the financing community.
- Our new "World of Applications Dome" contributed in a big way to demonstrate the need for fibre to the end consumer. The impressive dome construction – all branded with the FTTH Council Europe's visual identity – and the hands-on demos on entertainment, teleworking, e-health and smart-home services attracted a huge number of end users and decision makers in Brussels, Paris and London.

- An interesting change happened this year: our stakeholders regained an interest in technical information. Our Deployment & Operations Committee therefore created two new technical whitepapers and organised a very successful workshop at the FTTH Conference.
- We further extended our contacts at the European Commission and the European Parliament were further extended. Our meeting with Vice-President Kroes and several meetings with MEPs demonstrated that the FTTH Council Europe has successfully proven its position as a strong source of information in Brussels.
- On a global scale the FTTH Council Global Alliance, the working group of all five FTTH Councils, gained

speed under the lead of the FTTH Council Europe. The first global FTTH magazine "The Light Age" was presented at the FTTH Conference in London.

These impressive achievements were only made possible thanks to the strong support of our members, the efficient efforts of the volunteers of the committees, the outstanding commitment of Committee Chairs and Board Members, and the dedication and hard work of our contracted team.

We would like to take this opportunity to thank you personally for your support in what we believe is the only future-proof broadband solution that truly has the power to change lives.

Karin Ahl Hartwig Tauber

FINDINGS



Winners and losers emerge in Europe's race to a fibre future

Over the last year, FTTH deployment across Europe has continued to grow steadily, but the gap between the leaders and laggards is increasing. The gap between the EU and other regions is also widening.

On the whole, household penetration rates in Europe remain low compared to APAC and the US. The European leader is Lithuania with 31% penetration. France, Italy and Spain are still at the bottom of the FTTH ranking (listing of more than 200,000 households where more than 1% of homes are FTTH or FTTB subscribers). Germany and the UK failed to qualify (source IDATE). For a detailed overview of the ranking, see the graph in the Facts & Figures chapter of this publication.

While the Nordic countries are maintaining rather steady positions, there is strong progress in many Eastern European economies as well as in large non-EU countries, especially Russia, the Ukraine and Turkey.

In the economies covered by our market forecast (source Heavy Reading), some 32 million households – about 10.5% of all homes – will be connected to FTTH or FTTB at the end of 2016. Looking at the EU exclusively, this total will be just over 17 million, or 8.7% of all homes. According to our projections, nine out of the 21 nations analysed in the FTTH market forecast (namely Lithuania, Norway, Sweden, Slovak Republic, Latvia, Estonia, Denmark, Portugal and Bulgaria) should achieve 20% penetration by 2016, but seven will still be under 10% penetration (UK, Italy, Germany, Switzerland, Spain and Austria). See graph in the Facts & Figures chapter.

In some Western European countries there is an increasingly large number of homes passed. This suggests that take up (the ratio of subscribers per homes passed) and household penetration could climb strongly if the right services are offered, backed by a well-thought-out market approach. We also see the regulatory picture improving, albeit slowly. Of course, the current economic challenges in Europe aren't helping to move things along, but we feel it is not entirely justifiable to blame slow progress in fibre entirely on this.

Real estate owners see FTTH benefits

Since there was a distinct lack of primary research material expressing the benefits of FTTH/B as a differentiator for real estate businesses and individual home owners, the FTTH Council Europe commissioned a study to collect data from real estate firms who have experience with FTTH/B and make this accessible to real estate players and to network providers considering broadband solutions.

Our opinion on The arguments against fibre

The European Union can become a key player in the global telecommunication and broadband services market, but this requires firm leadership to support the decision makers. Governments across the EU are putting off ICT and broadband investments, citing three main arguments:

"There is no market evidence that higher speeds are needed" – The FTTH Council Europe's has investigated take-up rates of fibre networks that have existed for several years. It is a fact that consumers will, in time, subscribe to high-speed fibre products, even at a premium price. Consumers who have experienced high bandwidth and quality of services are very loyal.

"Financing networks is too costly" – The FTTH Council Europe cost model, based on bottom-up cost calculations of existing fibre projects and real geographical information data, shows that delivering fibre to nearly all European households will cost less than half the cost estimated by other sources. Furthermore, over the last 18 months, pension funds, institutional and private investors and regional investment banks have started investing.

"Europe has more urgent problems than broadband" – Every 10% increase in broadband penetration generates 1% GDP increase, states management consultant Arthur D. Little. For every 1,000 new end customers 80 new job opportunities are created. Studies from OECD, European Investment Bank and others all show that future-proof fibre networks positively impact productivity and economic growth.

Weakening Digital Agenda Europe targets will lower our global competitive power. Europe must roll out future-proof fibre broadband networks as soon as possible for the good of our economy, society and environment.

Overall, the real estate players all stated that they had derived specific benefits from the inclusion of FTTH/B, and they were very satisfied. However, they also pointed out clearly that awareness in their field is still too limited. Well-structured legislative approaches, especially for new buildings, could help.

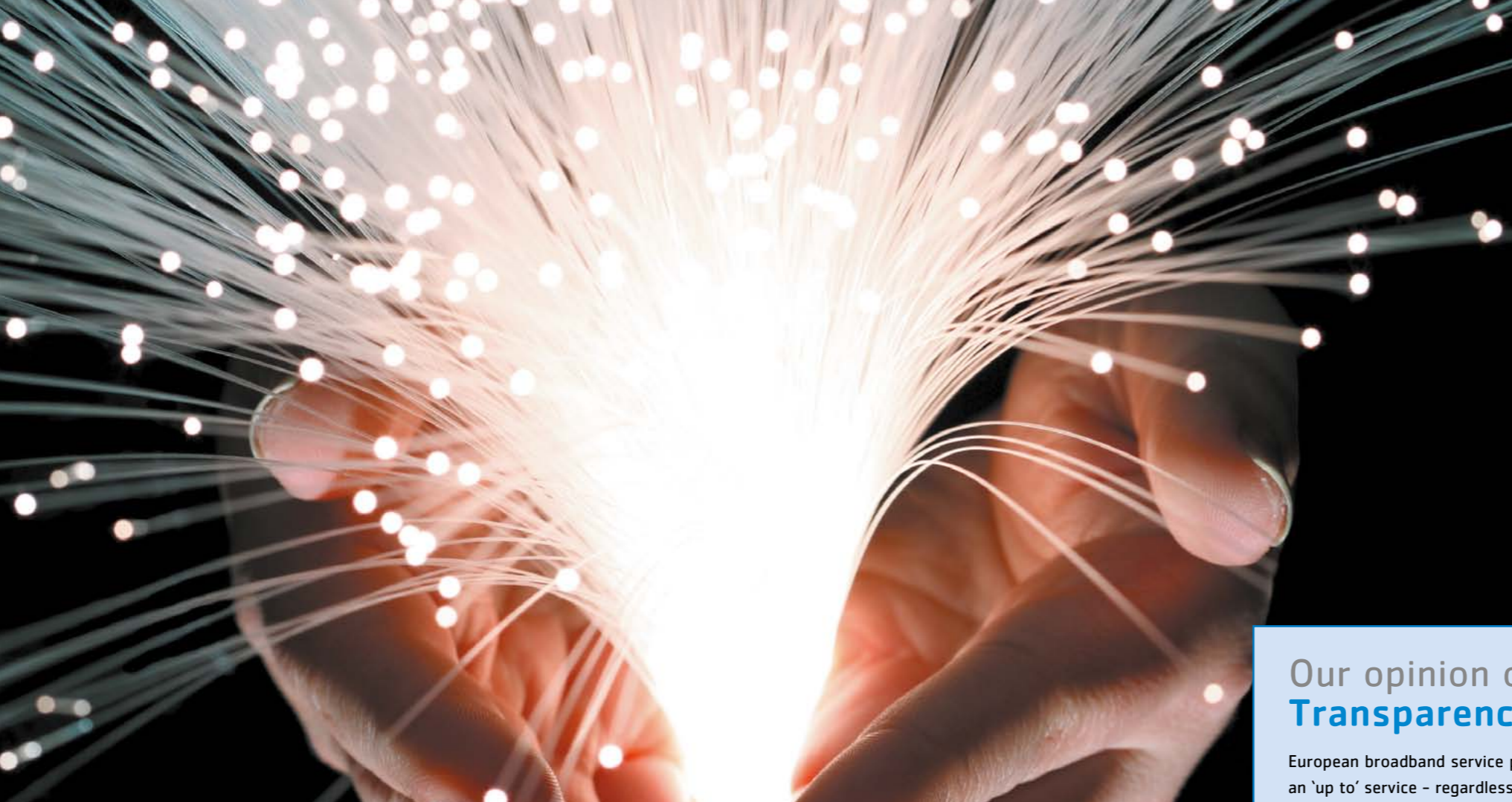
Several specific factors that can lead to a breakthrough of fibre in real estate were singled out. These include demonstrating the ability of FTTH/B to combine telecommunications with metering and other utilities, bringing

more energy-efficient, even carbon-neutral, homes to the market and enabling services for health care, elderly care or on-demand content applications. Uptake could be stimulated by ensuring that a rich and relevant service portfolio is available, thereby maximising the value of fibre to the end user (source Diffraction Analysis).

Our reports and studies, together with individual case studies, are available at the Resources centre on our website www.ftthcouncil.eu.

Jan Schindler, Chair of Market Intelligence Committee (MIC)

Spela Kern, Vice chair MIC and project manager FTTH Panorama & Forecast



Building bridges with the financial community

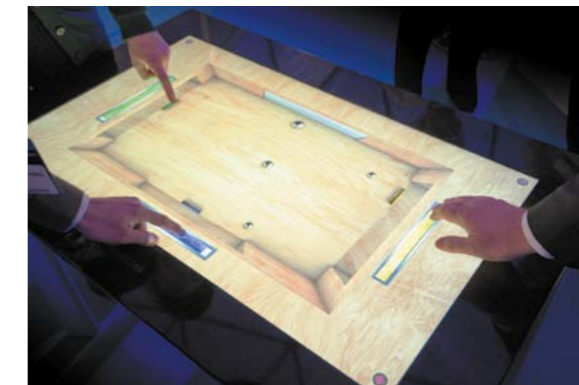
One of the Business Committee's main topics this year was 'approaching the financial community'. We started off by asking ourselves several questions:

- What triggers the financial community to invest?
- What kind of information do they find genuinely relevant when making decisions? How well do we speak their language?

The FTTH Council Europe has earned a leading position built up over the years, and this means we need to tackle these questions.

For many investors, a fibre network superficially resembles a utility network – but one where nobody has a monopoly on the infrastructure, and where different types of technology and services are offered by different parties, which adds confusion.

To make fibre investments more interesting and attractive for the financial community, 'de-risking' assets is key. By this, we mean reducing construction, technology and market risk. It has been proven that construction risk can be controlled and that managing technology risk is really all about managing perception. However, market risk is a real issue: Investors must be confident that networks really will be utilised and that



usage will be paid for by companies, the public sector and consumers.

Regulatory clarity and stability are also necessary to trigger investment, but these are not sufficient

Our opinion on Transparency for the customer

European broadband service providers are allowed to charge consumers top rates for an 'up to' service – regardless of whether they actually deliver promised speeds. There is significant discrepancy between advertised and actual broadband speeds. To take one example, in May 2011, the average advertised speed in the UK was 15 megabits per second, which is 8.2 megabits per second higher than the actual average speed of 6.8 megabits per second (source Ofcom).

The Advertising Standards Agency has introduced new broadband advertising rules, and, in 2012, European Commission Vice President Neelie Kroes promised to improve European broadband advertising.

Still, lack of transparency remains a concern across Europe and hampers end-user decision-making. Sometimes consumers can't even be sure that they are actually getting optical fibre. Fibre to the cabinet, for example, still relies on copper telephone cables from the street cabinet to the home, creating bottlenecks in the last mile to the end user.

Providers claim "up to" is the only way to effectively advertise broadband, due to network congestion and technical constraints. However, studies prove that FTTH makes it technically possible to guarantee access speeds. A well-designed fibre access connection is physically capable of delivering 100% of the advertised speed – and at times even more – throughout the network.

Market research shows that "real FTTH" subscribers are far more satisfied with their broadband. In our view, it is imperative that consumers get clear and accurate information about broadband services so they can make an informed choice.

conditions in themselves. The financial community does not like surprises! What is probably needed most is early evidence that FTTH can outplay copper and cable. One regulatory measure that would make this more evident might be to introduce stricter consumer protection laws controlling how network speeds are advertised – no more 'up to...' offers!!

The Investors Day – the workshop we organised at the FTTH Conference 2013 – was a great success. The financial community has recognised the FTTH Council Europe as an organisation they can turn to for clarification on a variety of topics that are directly relevant to them.

In the coming year, investor education regarding the merits of FTTH will continue to rank high on our agenda. We are already discussing the possibility of additional Investor Days and we are increasingly becoming involved in governmental discussions. Clear target groups for us are those managing Private Equity as well as Infrastructure Funds, which are both interested in different aspects of network projects.

The Business Committee will be renamed "Financing Committee" to better reflect this new range of activities.

The latest version of the Business Guide is available for download on www.ftthcouncil.eu.

Joeri Van Bogaert, Chair of Business Committee

Thomas Langer, Finance Consultant, Business Committee



Moving on with the Digital Agenda

Over the past year, the Policy and Regulation Expert Group responded to more public consultations than ever before. In total, the FTTH Council Europe submitted nine documents to the European Commission, BEREC and the United Kingdom's House of Lords.

One important consultation for the European Commission was on the EU initiative to reduce the cost of rolling out high-speed communications infrastructure in Europe. We conducted a survey amongst all FTTH Council Europe members to discover which factors could contribute to deployment cost reductions. The general consensus was that significant cost reductions can be found on the technical side by re-using existing infrastructure. In theory, this could be as much as 35%, but we concluded that this was rather optimistic, and that the savings, although substantial, would be lower.

There are several reasons for this. A sewer company, utility or telecom operator can delay your project, even

if you have a legal right to use their infrastructure. Furthermore, technical documentation might be incomplete, or out of date. Ducts listed as empty on paper may turn out to be filled with cables! In such cases, it can actually be much cheaper to dig your own trenches. Alternatives such as micro-trenching or laying the fibre nearer the surface can be more effective. We also looked at infrastructure-sharing from the perspective of competition. Fibre competition is simply not happening in Europe. When one party invests in digging trenches and installing ducts, they might leave room for the next party to lay their fibre. However, the big question is: Will another company actually want to use this capacity? The European Commission understood our reasoning and was

very grateful for our input on this matter. Once again, we positioned the FTTH Council Europe as the leading authority in our field.

We also continued a project started last year, which looked at the real cost of rolling out fibre all across Europe. This is calculated by looking at a wide range of accurate data available to our member companies. Last year we published a figure of €202 billion – almost a third less than the official EU figures. We were invited to defend our cost model and outcomes before the European Commission, and we are happy to report that they didn't find any weak points. We're now calculating the cost for specific countries, based on this model, and found the outcome consistent. We have looked at Germany and now consider developing models for France, the UK and Spain in the coming years. A comparison with actual investment on fixed infrastructure by incumbent operators is available in the Facts & Figures chapter of this Report.

Furthermore, we are expanding our presence and activities in Brussels. After all, we need to be where the action is!

Hartwig Tauber, Chair of Policy and Regulation Expert Group

Our opinion on The role of governments

An OECD survey found that cost savings derived from NGA infrastructure in just four sectors of the economy – transport, health, electricity, and education – would justify the construction of a national FTTH network. Citizens with ultra-high-speed network access at home can also engage in teleworking and have access to real-time, interactive services.

The European Commission has stated that Next Generation Access networks must be in place by 2020 to compete with other global regions. All European households should have a 30 megabits per second minimum download rate and 50% should have 100 megabits per second connections.

A key driver of the Digital Agenda is the desire to eradicate potential digital divides in areas where there may be little or no incentive for commercial operators to build high-speed infrastructure. Yet many governments are still not getting to grips with the challenge of deploying future-proof NGA infrastructure. One solution could be, for example, developing Public-Private Partnership (PPP) models on a national or local level.

Governments should also coordinate between stakeholders, including local and regional authorities, public and private investors and regulators, to create the legislation and incentives required to ensure sufficient NGA networks are built by 2020.



Opening up a new world of opportunities

The World of Applications Committee focuses on accelerating adoption and value of the advanced FTTH-enabled applications that will drive fibre uptake and create new cross-sector business opportunities.

The World of Applications' demos initiative addresses end users as well as policy makers in order to create demand for fibre connections from the market. Over the past year, we participated in several events, exhibiting interactive, hands-on demos of innovative FTTH-enabled services that are already in the market in countries such as Sweden.

The World of Applications Dome was presented at Open Days in Brussels, the Salon des Maires in Paris, and, of course, the FTTH Conference 2013 in London.

The Committee also provided speakers for events that aren't directly related to the fibre industry, such as the

Smart City Expo World Congress in Barcelona. Presenting the applications in a dynamic manner is a great way of explaining to both the industry and end users exactly how fibre will benefit them and why they will need it in the near future. The possibility of creating immersive experiences through high-bandwidth, low-latency networks is an important driver for FTTH adoption, especially in the entertainment market, which is the highest revenue-generating segment.

Taking the applications out into the real world is vital for creating awareness among consumers, who often don't know that these services even exist! This is just the beginning when it comes to FTTH-enabled services – it is a fact that the increase in bandwidth availability spurs innovation and leads to the development of further services.

Small businesses throughout the world are very interested in using next-generation networks to bring their products and services more easily to their target markets. That could be a strong motivator for government deployment of networks. In Australia, for example, the government is taking an active role in rolling out fibre as a community-building and business tool. In the US, studies have estimated that e-health

and broadband connectivity will enable savings of billions of dollars over the next two decades. This will largely be a result of intelligently storing and analysing ever-growing volumes of data and enabling faster and better communication between medical professionals and institutions.

Looking at the future, we are particularly interested in new applications that can be designed around the growing number of end-user devices. We are planning to release our first on-line 'services store' soon – a catalogue of new and innovative broadband applications, which we prepared with the help of Belgian research agency i-Minds.

Further ideas include a 'matchmaking' website, where people interested in using a certain type of fibre-enhanced service can find the companies that offer it. This can create new opportunities to approach investors and bring together companies that offer complementary technologies.

Ana Pesovic, Chair of World of Applications Committee



Our opinion on Fibre to the TV

Ageing networks are holding back developments in broadcasting. Current cable and Internet TV connections can't accommodate growing bandwidth demand, driven by new technologies such as 4k, Video on Demand and 3DHD. Programmes jitter and pause when buffering and services are limited, leading to customer dissatisfaction.

Today, buying, storing and watching media content is easy, thanks to developments in Cloud Computing, payment technologies and licensing legislation. The UltraViolet industry consortium, for example, allows users to purchase and watch content anywhere. Given that a 4K film wouldn't even fit onto a blu-ray disk, online distribution is clearly the future.

Operators and content providers need to act now and opt for FTTH, which provides the highest speeds. Optical signals offer better audio and video quality, higher channel counts, less static and interference, more interactive options and better hacker protection and online transaction security. Multiple users per household can view and record data-rich content streams across platforms and devices in real time.

Integration of broadband and broadcasting also allows for new broadcasting services and business models, including targeted content suggestions and advertising, niche programming, on-demand content and enhanced viewing with added regional information.

Tomorrow's television will only realise its full potential if it is powered by FTTH – the most high-tech, reliable, long-lasting and cost-effective solution available.



The future is SMART

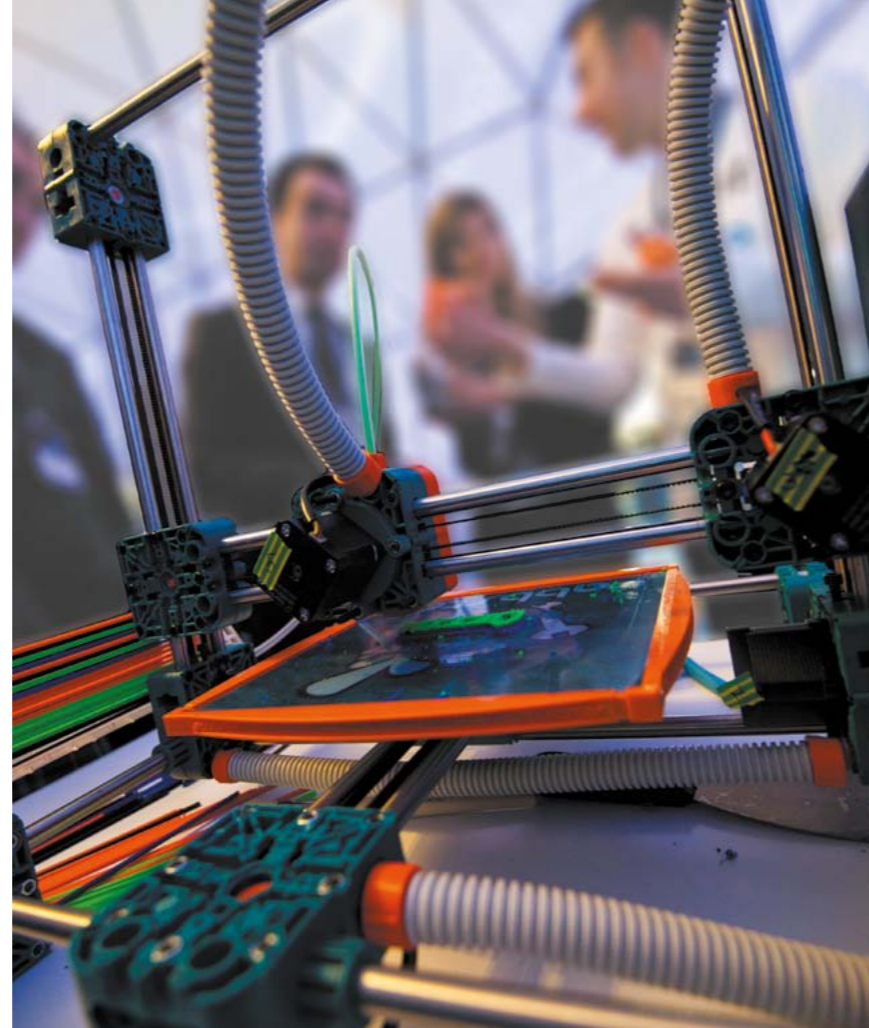
Fibre networks aren't only created to provide better Internet-access and usage today. They are also built with an eye on the future. A Smart City can optimally benefit from the opportunities this infrastructure offers. The FTTH Council Europe's World of Applications Committee formed a dedicated group in 2012 to research concepts such as the Smart City and Smart Home and to investigate how they are developed and which stakeholders are involved.

A Smart City is based on a strong, reliable communication network, which acts as the foundation for a wide range of integrated, intelligent applications and services. The Smart City is typified by low-carbon use and high quality of life.

In our view, a Smart City can best be compared to the human body. We humans use our interconnected senses to gather information and then base our decisions on that. FTTH is the superfast, symmetrical and interactive nervous system for cities.

In order to be truly 'Smart', a city in the future will work in the same way, gathering data from many sources in an integrated manner, making sense of it all and reacting in a way that is beneficial to its inhabitants. This could apply to traffic, infrastructure, lighting, healthcare, power consumption and distribution, and many other areas. Being Smart can help a municipality become less dependent on nuclear power or hydrocarbons. People may be motivated to generate their own energy and even sell it to the local grid. Increased interconnectivity could also lead to radically different approaches to healthcare or elderly care. A graph of this interactive nervous system is available in the Facts & Figures chapter of this Annual Report.

As everything becomes digital and connectable, cities will need a dedicated network and purpose-built tools to



access and mine all the data available. Already today, some cities aren't leaving it to the service provider to deploy a network, but they're taking a far more active role. After all, why should the city's nervous system belong to a telecoms company?

Being Smart is also a matter of organisation, not just technology. Several cities claim to be 'Smart already', but we discovered that very few really are, as they are still functionally organised in silos and systems cannot interact. The system has to be scalable, just like the cities and the services available in them.

In 2030, 70% of the world's population will be living in cities, according to several leading studies. Of course, the other 30% in rural areas have similar challenges. These rural regions also need efficient communications systems for the

development of their business. The Smart City network must therefore reach out to its nearby regions.

We've demonstrated that this subject is of interest to a wide range of people, hence worth exploring further. Our workshop at the FTTH Conference 2013 was well attended, which shows that this is a hot topic. As a result, our group will now become the Smart Cities Committee to explore these topics further in the coming years. The FTTH Smart Guide, available for download at our Resources centre on www.ftthcouncil.eu, can help legislators, utility managers, telecom service providers, city planners and architects gain insights and think ahead.

Paolo Sebben, Leader of Smart Group, World of Applications Committee

Enabling next generation mobile communications

This year the Deployment and Operations Committee undertook two large projects to research wireless and wireline technologies. Our aim was to provide a deeper, more extensive insight into the current and future benefits and challenges of various technologies. This resulted in two whitepapers: 'Working Together: the Synergies of Fibre and Wireless Networks' and 'Position Paper: Broadband Access Technologies'.

The first paper examines optical fibre as an enabler for wireless systems. Cisco's Visual Networking Index states that global mobile data traffic worldwide will increase 18-fold between 2011 and 2016. This is largely driven by the demand for video content and the vast increase of mobile devices, such as smartphones, tablets and laptops with dongles. Wireless networks in the licensed spectrum - whether they are WiMAX, 3G or LTE - face the challenge of meeting this growth in data consumption.

We concluded that wireless networks have their own strengths but cannot be seen as a real substitute for residential and business connections. Only in very sparsely populated areas,

where there is simply no alternative, might this wireless substitute be taken into consideration. Wireline networks based on fibre will, however, provide required backhaul capabilities for wireless networks. This will help them to meet the increase in mobile data demand.

In the second white paper, we compared the performance characteristics of fibre-based access technologies with those of the latest copper-based access technologies. DSL with acceleration techniques like bonding, vectoring and 'phantom mode' can offer maximum bit rates of several hundred Mbps over short distances. These solutions, however, still have significant limitations compared to all-fibre networks, such as much slower upload speeds and bonding/phantom mode that require the availability of multiple copper pairs.

Cable networks using DOCSIS 3.0 can provide download speeds comparable to VDSL2. However, the upload speed is restricted, and total capacity must be shared among many subscribers, which can adversely affect performance. Although copper-based access networks meet most current customer requirements and are likely to coexist with fibre-based technologies for the next few years, only fibre technologies can meet future needs as bit-rate requirements continue to grow.

Wolfgang Fischer, Chair of Deployment & Operations Committee

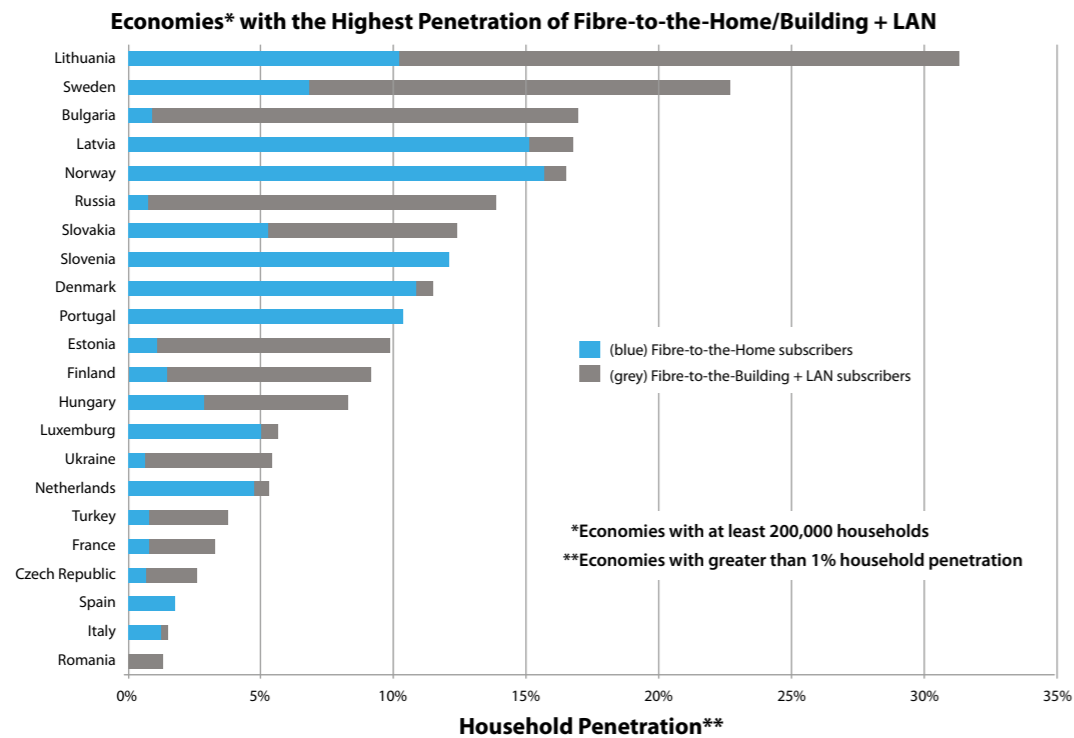


Facts & Figures

FTTH European Ranking

There are 22 European countries where more than 1% of households are FTTH/B subscribers.

Source: IDATE

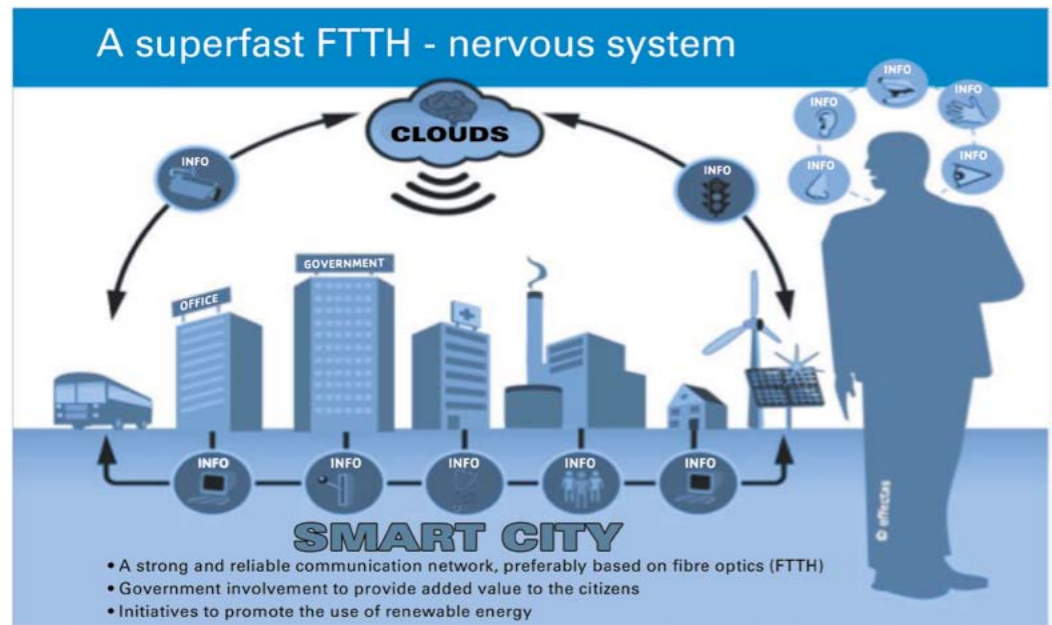


December 2012 European Ranking
Source: IDATE and FTTH Council Europe
February 2013

Smart city

A smart city is based on a strong and reliable fibre telecommunications network, as its nervous system.

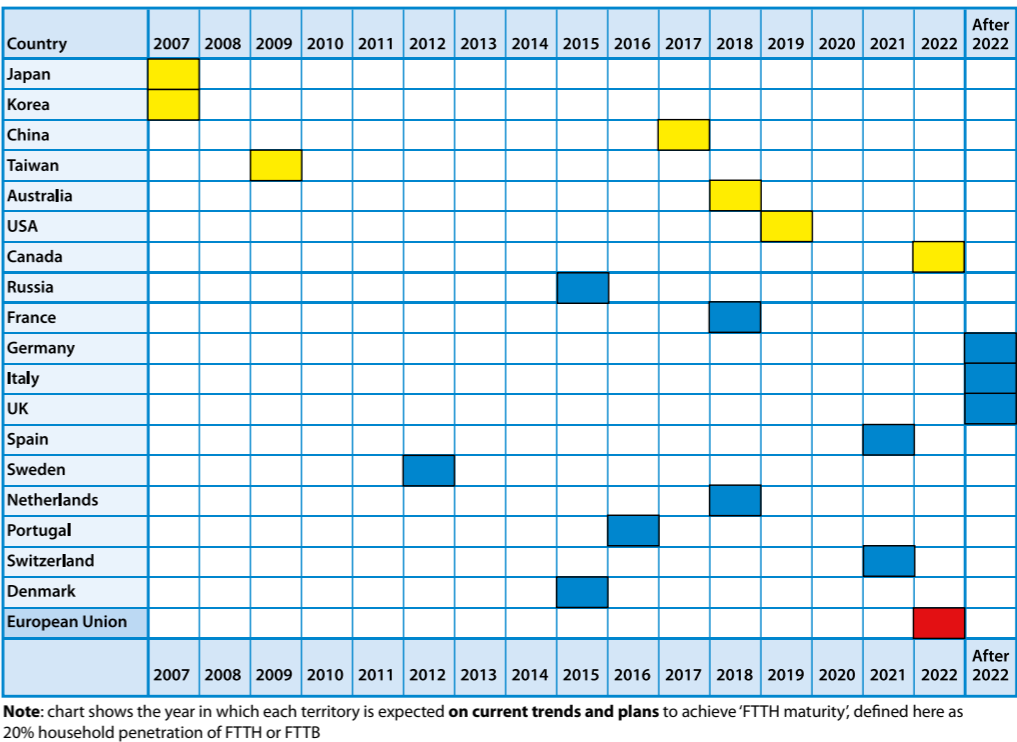
Source: Smart Cities Group, FTTH Council Europe



The race to FTTH maturity

FTTH maturity starts when more than 20% of households are FTTH/B subscribers in a given economy. This table shows the year when this level is expected to be reached. But 20% is only the start!

Source: Heavy Reading

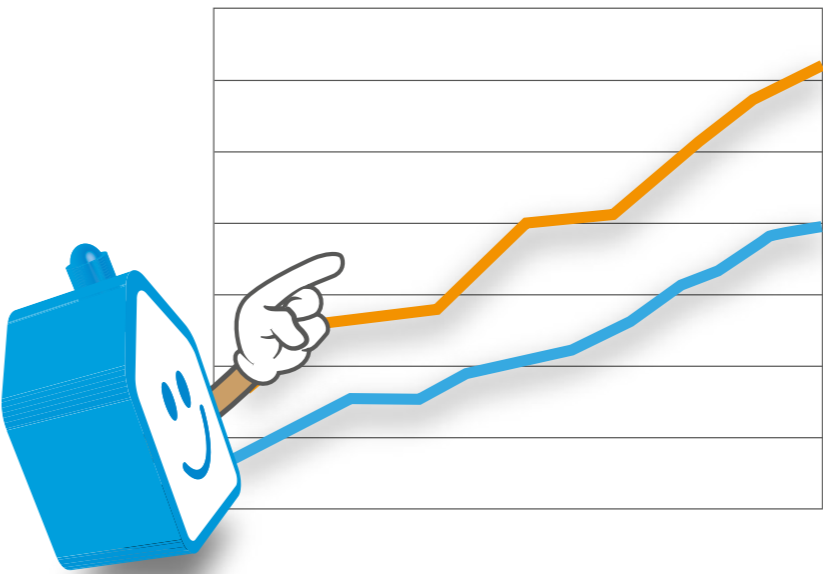


Investing in FTTH

FTTH is a future-proof investment; any public money should not be wasted on intermediary solutions.

Source: Ventura Team LLP

Costing and funding fibre roll-out



Food for thought:

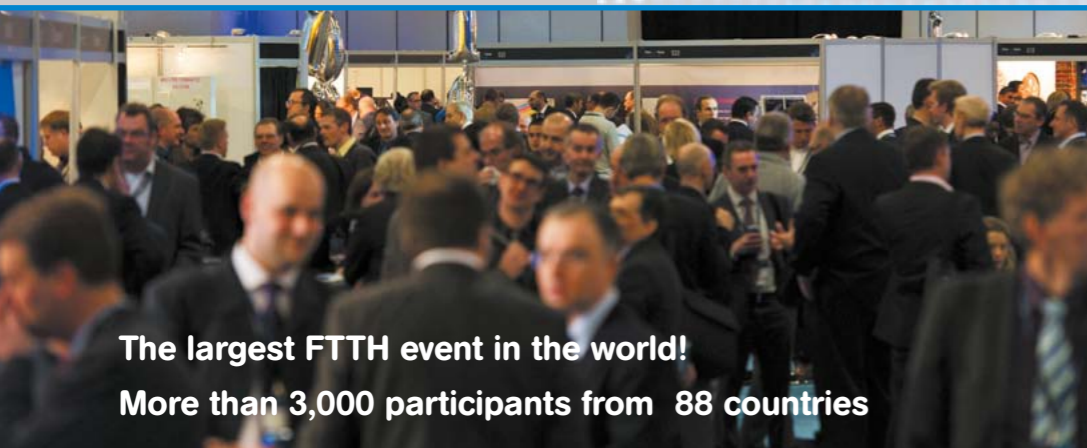
EU operators invested €24.8 billion on fixed infrastructure in 2011.
Over 9 years to 2020 = **€216 billion**

Estimated cost of deploying FTTH = **€202 billion**



COMMUNICATIONS

FTTH Conference 2013 10th Anniversary edition Celebrating a **Brighter Future** 19-21 February, London



The largest FTTH event in the world!
More than 3,000 participants from 88 countries



FTTH Council Europe Awards
Operator Award was given to JT Group Limited
Individual Award was given to Benoît Felten, CEO, Diffraction Analysis.



The 9 parallel workshops on the first day attracted more than 1,000 delegates.



World of Applications Dome – demo area for hands-on experience of FTTH enabled services



Keynote Speech by Alexander Bard, philosopher and internet sociologist



113 top-tier exhibitors from all over the world

Opening Ceremony with speeches from Gunnar Hökmark, Member of the European Parliament
Anthony Whelan, Head of Cabinet of Vice-President Neelie Kroes, European Commission
Chi Onwurah, Labour MP for Newcastle Centre and Shadow Cabinet Office Minister



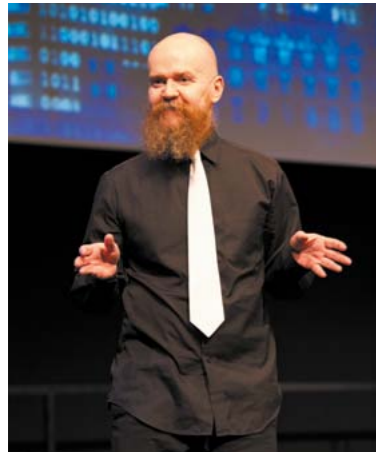
FTTH Conference 2013 raises 'green donation' for UK environmental organisation The Carbon Trust

FTTH Conference 2013 Testimonials



"The EU 2020 targets are out of date and we need to do something more if we want to be in the lead. (...) Europe needs to think GIGABITS instead of MEGABITS."
Gunnar Hökmark, Member of the European Parliament

"FTTH is a key part of our economic future, and therefore a key part of what policy makers should be thinking about."
Chi Onwurah, Labour MP for Newcastle Centre & Shadow Cabinet Office Minister



"FTTH is not radical enough. It should be FTT-Everything."
Alexander Bard, Philosopher and Internet sociologist, FTTH Conference 2013 keynote speaker

"It's really important that service providers deliver what they market."
Anders Christjansen, CEO of Waoo.



"For mobile you need strong fibre infrastructure."
Murat Erkan, General Manager of Turkcell Superonline.

"We've only started to scratch the surface around interactive services. It will drive consumers to want more bandwidth and the bigger the audience gets the more we will cater to the immersive experience."
William Fay, Film Producer, and President, Global Entertainment Advisors.



Resources

29 Case Studies from 19 countries
Andorra, Austria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, Macedonia, Netherlands, Norway, Portugal, Russia, Spain, Sweden, Switzerland, UK



New: FTTH Primer – What Fibre to the Home can do for you community
The objective of this new publication is to inform communities, including local governments and citizens, about the advantages of FTTH. Topics covered include socio-economic benefits, market panorama, FTTH-enabled services, smart home & smart cities, and economic models for local communities. The FTTH Primer is available in English and French.



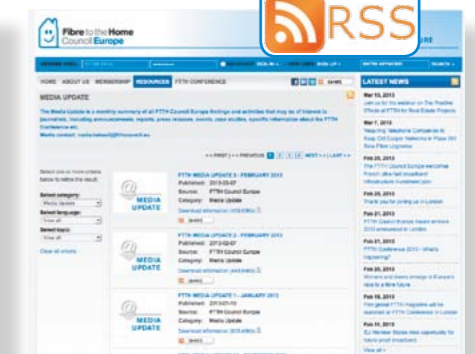
10 CEO Interviews



Our monthly newsletter, Fibre Horizons, reaches more than 6,700 subscribers, twice as many as last year, with news about FTTH Council Europe activities and findings



Monthly Media Update to more than 2,500 media contacts

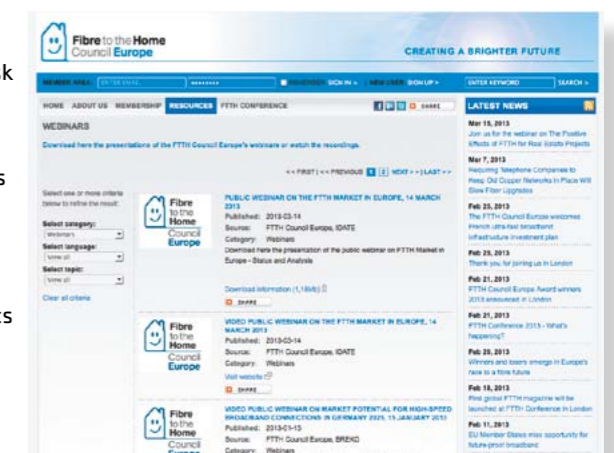


8 Opinion Articles in 12 languages
Catalan, English, Dutch, French, German, Hungarian, Italian, Lithuanian, Russian, Polish, Portuguese, Spanish



Webinars

We have also organised a number of very successful webinars. The objective is to present our most compelling studies, for instance the FTTH Market Panorama, to the telecom world and a wider community, in a highly accessible manner. Analysts present their findings during half an hour and then people are offered the opportunity to ask their questions. Sometimes, we'll invite external parties to present interesting studies too: SNL Kagan presented successful operator stories from around the world and WIK shared their study results about bandwidth demand in Germany.



Widening the scope

Last year, the FTTH Council Europe began taking a broader approach to social media. We are now presenting our messaging through more platforms than before, and taking a more interactive approach to communications. The Social Media Group was created in 2012, to engage member companies and allow them to provide input.



Our highly interactive LinkedIn community is successfully facilitating information-sharing with some 3,100 broadband stakeholders.



On Twitter, we serve a wider community of nearly 1,500 Followers, including a wide range of media. We point our Followers – a broad range of individuals, companies and institutions, from Microsoft to the European Commission – towards relevant FTTH news and information. Twitter acts as a strong multiplier, as every retweet can reach a whole new community. We also held several Twitter chats with FTTH Council Europe's President Karin Ahl, who is very active on social media.



The FTTH Council Europe Facebook page informs people about our findings and upcoming activities, whilst also presenting available content such as video clips, articles, images and graphs. This leads to very interesting reactions and acts as a multiplier. Over the past year the number of Likes for our page has doubled. Our second Facebook page, 'I want fibre', reaches out to end users all across Europe. This new page will be fully launched with a dedicated campaign in 2013. Further plans for 2013 include consolidation of social media activities across different platforms, and more reaching out to the end user, using the 'I want fibre' page as a launch platform.

Next year, the FTTH Conference 2014 will be held in Sweden. Social media adoption in Scandinavia is huge, so we will certainly be taking our activities to a new level.



Video clips

We will also continue to share content, such as our video clips, which are all available on YouTube and Dailymotion. A new FTTH end-user video clip was produced in the past year, looking at how a family in the Netherlands benefits from FTTH.



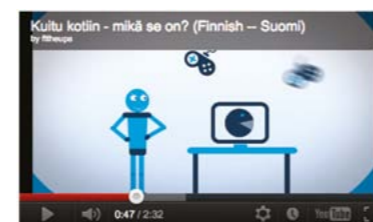
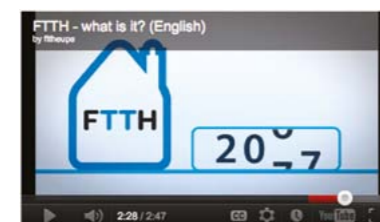
www.youtube.com/fttheupa



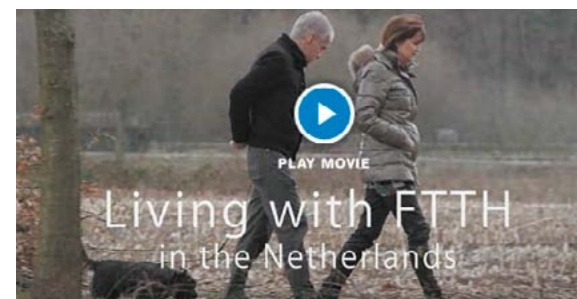
www.dailymotion.com/FTTHCouncilEurope

FTTH – what is it? in 12 languages

Arabic, Danish, English, Finnish, French, German, Hungarian, Italian, Lithuanian, Polish, Spanish, Turkish



End Users Clips



Creating a Brighter Future in 8 languages

English, French, German, Hungarian, Italian, Polish, Spanish, Turkish



Press relations

81 interviews with media in 15 countries

Belgium, Brazil, France, Germany, Greece, Hungary, Ireland, Lithuania, Netherlands, Portugal, Russia, Spain, Sweden, Turkey, UK

4 press conferences in Barcelona, Vilnius, London (2x)

A local media campaign in Lithuania and a press tour in the UK

15 press releases in 13 languages

Catalan, Dutch, English, French, German, Italian, Lithuanian, Portuguese, Russian, Spanish, Swedish, Turkish, Ukrainian



173 press clippings in various languages including key national media

Danish, Dutch, English, French, German, Greek, Hungarian, Italian, Lithuanian, Portuguese, Russian, Spanish, Swedish, Turkish



External events

New Presentation



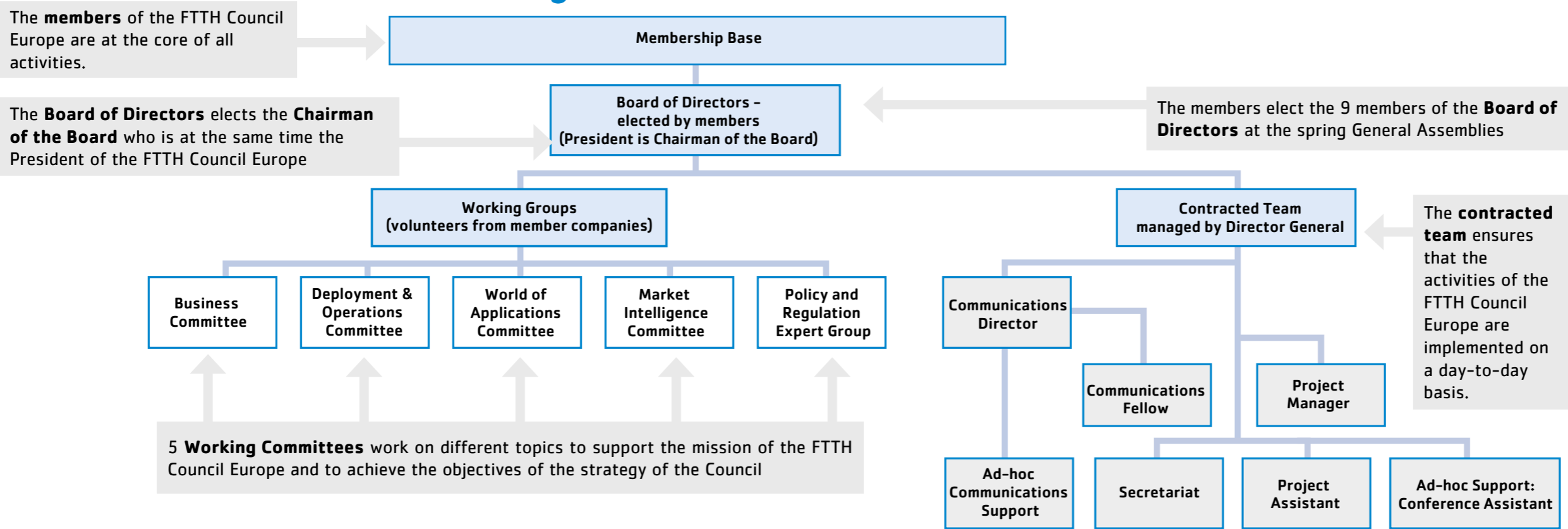
36 speakers, 19 contra-agreements, 10 booths and 2 World of Applications Domes in 17 countries Austria, Belgium, Brazil, Croatia, Germany, Finland, France, Lithuania, Netherlands, Norway, Russia, Serbia, Spain, Sweden, Switzerland, UK, Ukraine





Inside the FTTH Council Europe – how does it work?

Organisational Structure



Team

Michaela Fischer, Project Assistant

Doris Krenn, Secretary

Lana Krestyanova, Conference Assistant

Hartwig Tauber, Director General



Natascha Weinstabl, Project Manager

Yi-Ling Lin, Conference Assistant

Nadia Babaali, Communications Director

Susan Svoboda, Communications Support

Sally Van den bemden, Communications Fellow

Board of Directors



Karin Ahl,
President



Matthias Nass,
Treasurer



Edgar Aker,
Member of the Board



Carlos Barroqueiro,
Member of the Board



Pär Cedergren,
Member of the Board



Eric Festraets,
Member of the Board



Paul Schwartz,
Member of the Board



Pastora Valero,
Member of the Board



Gerlas van den Hoven,
Member of the Board

Chairs

Joeri Van Bogaert,
Business Committee



Ana Pesovic,
World of Applications
Committee



Chris Holden,
Policy & Regulation
Expert Group



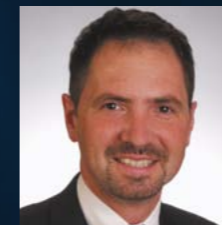
Wolfgang Fischer,
Deployment &
Operations Committee



Jan Schindler,
Market Intelligence
Committee



Paolo Sebben,
Smart Cities Group



Committees

Business Committee

The Business Committee has started the "FTTH Council Europe Investors Project" to work on the financing of fibre networks. The "Investors Day" at the FTTH Conference in London was a landmark achievement of the group. This included building up a network of contacts to the financing world.

Business Committee Project Managers:

Gerhard Jacobs, LG Ericsson
Investors Project

Deployment & Operations Committee

This committee discusses all technical aspects of fibre networks. This includes the passive and active part of the network as well as the deployment methods, network architectures and new fibre technologies. The Deployment & Operations Committee has created white papers on access technologies and wireless/fibre synergies in the last year.

D&O Project Managers:

Stephen Hough, Sterlite Technologies
Wireless/Wireline White Paper

Rong Zhao, Detecon International
Access Technologies White Paper

World of Applications Committee

What new content, applications and services are enhanced or enabled by fibre networks? The World of Applications Committee is working on projects to give an answer to this question. The creation of the "World of Applications Dome" which was presented in Brussels, Paris and London is an achievement of this committee.

WoA Committee Project Managers:

Ronan Kelly, ADTRAN
Timeline-Project

Ana Pesovic, Alcatel-Lucent
Value-Added Services for FTTH study

Market Intelligence Committee

The objective of the Market Intelligence Committee is to provide information about the latest market data and market developments to the FTTH Council Europe. This includes topics like FTTH in real estate or financing of FTTH networks. The Market Intelligence Committee is responsible for the FTTH Market Panorama, including the FTTH European Ranking, and the FTTH Market Forecast.

MIC Project Managers:

Spela Kern, Iskratel
Market Panorama & Market Forecast

Jan Schindler, Prysmian Group
Market Panorama MENA

Joeri Van Bogaert, Capabilities
Real Estate Owners study

Policy & Regulation Expert Group

The Policy & Regulation Expert Group has a clear focus on the regulatory and policy framework for fibre networks. This includes contacts to the European Commission and regulators as well as organisation of workshops and inputs for national and regional policy makers.

P&R Project Managers:

Florian Damas, Alcatel-Lucent
Financing Stimulus study

Chris Holden
Cost Project

Smart Cities Group

Started as a subgroup of the World of Applications Committee, the Smart Cities Group has developed a wide range of activities to showcase the need of FTTH in smart cities and regions. This includes the first edition of the "FTTH Smart Guide" as well as presentations at smart cities conferences.

Smart Cities Project Managers:

Paolo Sebben, Consultant
FTTH Smart Guide

Matthias Nass, Elcon Systemtechnik
Smart Cities presentation

FTTH Council Global Alliance



www.ftthcouncil.org



www.ftthcouncil.eu



www.ftthcouncilap.org



www.ftthcouncilmena.org



www.ftthcouncilafrica.com

Global Power with Regional Strength

The FTTH Council Global Alliance (FCGA) is the platform for cooperation of the five global FTTH Councils. All FTTH Councils share a common goal: the acceleration of fibre to the home adoption. They all act as powerful and independent organisations in their specific market. This regional focus gives the FTTH Councils a special strength to adapt their activities to the particular market situation in their area.

The FTTH Council Global Alliance ensures that those regional efforts are combined with the power of global cooperation. Within the FCGA the FTTH Councils exchange studies, information and latest market developments. Joint projects – like The Light Age magazine – allow global activities and intercontinental networking.

Meeting of the FTTH Council Global Alliance Group at the FTTH Conference 2013 in London



The Light Age – Volume 1, February 2013
The global FTTH magazine of the FTTH Council Global Alliance

List of partners

Organisation	Country	Since
Cercle C.R.E.D.O	France	2010
ETNO: European Telecommunications Network Operators' Association	Belgium	2009
Europacable	Belgium	2009
FTTH Council Asia Pacific	Japan	2010
FTTH Council Americas	USA	2010
FTTH Platform Nederland	Netherlands	2009
I-NEC: International Network of e-Communities	Netherlands	2009
SAMENA Telecommunications Council	UAE	2011
BREKO	Germany	2011
OpTech-Net e.V.	Germany	2011
Optixcat	Spain	2012
The Swedish Urban Network Association	Sweden	2011
EUTC	Belgium	2012
Finnish Regional Networks Association	Finland	2012
Dansk Energi	Denmark	2013
FIRIP	France	2013
Norsk Fiberforening	Norway	2013

Three Partner Agreements were signed at the FTTH Conference 2013 in London





Resources and publications

Publications:

- Fibre Horizons – Monthly Newsletter
- The Light Age – A Global FTTH Magazine
- FTTH Business Guide – Fourth Edition
- FTTH Handbook – Fifth Edition
- FTTH Smart Guide – First Edition
- Primer: "What Fibre to the Home can do for your community"
- Primer: "La Fibre jusqu'à l'abonné au service des citoyens et des communautés"
- Case Study Collection
- White Paper: "Working Together – The Synergies between Fibre and Wireless Networks"
- White Paper: "Broadband Access Technologies"

List of studies:

- FTTH Market Panorama Europe
- FTTH Market Panorama Middle East & North Africa
- FTTH Market Forecast 2012 – 2017
- Report: Regulatory policy and the roll-out of fibre-to-the-home networks
- Study: FTTH – The Solution for Mobile Broadband
- Study: Financing FTTH Networks
- Study: FTTH Networks & Real Estate
- Study: Financing Stimulus for FTTH
- Study: The Demand Potential for Fixed Broadband Access in Germany in 2025

Wiki: <http://wiki.ftthcouncil.eu>

List of video clips:

- Living with FTTH in Kilafor, Oberhausen, Nuenen and Utrecht
- FTTH – what is it? (in 12 languages)
- Creating a Brighter Future (in 8 languages)

Feel free to download these clips from www.ftthcouncil.eu and share them with the world!

Website: www.ftthcouncil.eu

- free downloads of case studies, CEO interviews, clips, Fibre Horizons newsletter, opinion articles, pictures, presentations, press clippings, press releases, publications like Business Guide, Smart Guide, Handbook, Annual Report, reports and studies summaries, webinars, etc.

Social media:

- LinkedIn: FTTH Council Europe Group
- Facebook: FTTH Council Europe Group & I want fibre Group
- Twitter: FTTHCouncilEU
- YouTube: www.youtube.com/fttheupa
- Dailymotion: www.dailymotion.com/FTTHCouncilEurope



Celebrating a Brighter Future

FTTH Conference 2013 - 10th Anniversary Edition - 19-21 February



See you at the next **FTTH Conference**
in **Stockholm** on **18-20 February 2014**

