

Members



- 3M Telecommunications
- ACOME
- Acreo
- ADTRAN
- ADVA Optical Networking SE
- Alcatel-Lucent
- Albert Grooten
- AND Solution
- Anritsu EMEA
- Apresa - PLP Spain
- Aurora Networks
- BAM Infratechnik
- Bentley Systems Europe
- Berthold Sichert GmbH
- BKTel Communications
- Brand-Rex Ltd
- Broadcom Broadband Access
- Calix
- Camozzi
- Canovate Group
- Capabilities BVBA
- CBE - Engineering and Construction
- Channell
- Cisco Systems
- Comptoir des Signaux
- COMSOF
- Condux International
- Connection Technology Systems Inc.
- Corning
- CTTS Training
- Dätwyler Cables
- Detecon International
- DIAMOND
- Digpro Technologies AB
- DKTCOMEGA
- Dr. Mohamad Amar
- DSM Desotech
- Duraline
- Dynamic Design
- EDEN LTD
- Egeplast International
- ELCON Systemtechnik
- EMC Electronic Media Communication
- Emtelle
- Ericsson
- Esri
- ETD Europe
- Exfo Europe
- Fiberdk
- Fibox
- FibreFab
- Filoform
- FNT-GmbH
- FOLAN
- Fraunhofer Institute for Telecommunications, Heinrich-Hertz-Institut
- Fujikura Europe
- gabo Systemtechnik
- GE
- Genexis
- Geo Data
- GM Plast
- HellermannTyton
- Heraeus Quarzglas
- Hexatronic Cables & Interconnect Systems AB
- Hitachi Communication Technologies
- Hochschule Furtwangen University
- Huawei Technologies
- HUBER+SUHNER
- ICOTERA
- Ilsintech Co., Ltd.
- iMinds
- Inno Instrument Europe GmbH
- Innovience B.V.
- Institut Mines Telecom
- Instituto Politécnico de Viana do Cast
- Inteno Broadband Technology
- Iskratel
- JDSU
- John Guest Limited
- Karl Bauer Consultant
- KeyFibre Network Components
- KEYMILE
- Langmatz
- Lisonet Technologies Limited
- Map Group (UK)
- Marais Groupe
- Mitsubishi Electric
- NetAdmin System i Sverige AB
- NetNordic Holding AS
- Nexans
- Ocilion IPTV Technologies
- OFS
- Opticreach Ltd
- OPTOTEC
- Pacific Broadband Networks
- PacketFront
- Paolo Sebben Consultant
- Parker Hannifin Manufacturing France SAS
- Pengg Kabel
- Plumettaz
- Prysmian
- PT Inovação
- Qualcomm Technologies Inc
- Radius Systems
- Rala Infratech
- Reichle & De-Massari
- Rotal Networks
- Senko Advanced Components
- Setics
- Silec Cable
- Skylane Optics International SARL
- Sterlite Technologies
- SUNSEA TELECOMMUNICATION CO.,LTD
- Synchronoss Technologies
- TE Connectivity
- Tele-Kabel-Ingenieurgesellschaft
- Telenco
- Tierre Group S.p.a.
- Tilgin
- TKF (BV Twentsche Kabelfabriek)
- TVC UK Holdings Ltd.
- United Technologists Europe Limited (UTEL)
- Wavin
- Webro Cables and Connectors
- WISI COMMUNICATIONS
- ZEW - Centre for European Economic Research
- Zhone Technologies
- ZTE Corporation
- Zweicom
- ZyXel Communications

10 YEARS OF Fibre to the Home Council Europe



Annual Report 2013 – 2014

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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 is a very special annual report, as the FTTH Council Europe celebrates its 10th anniversary this year. We took this opportunity to dedicate a full section to this unique occasion and document the successful history of our organisation.

When the FTTH Council Europe started in 2004 with a handful of FTTH enthusiasts as members, many people underestimated our message about the importance of fibre access networks in Europe.

Today, 10 years later, fibre access represents a key issue for most broadband stakeholders. At the same time the areas of focus have evolved and now cover the whole range of topics around FTTH networks. These include the benefits of fibre for end users, business, the economy and society, as well as questions about financing, planning and operating fibre networks. The FTTH Council Europe takes a position on regulatory topics in Brussels and in European countries and has become a valued source of information for all questions concerning FTTH.

Of course, this annual report also offers a review of our successful activities in the working year 2013/14. In this timeframe the FTTH Council Europe implemented many projects, the following of which are highlights:

- Our "Investors Project" further developed and continues to provide solutions on how to finance FTTH networks. Three very successful "Investors Days" in Helsinki, Brussels and Stockholm have proven that we are on the right track forward;
- In 2013 we focused special attention on decision makers in Brussels. Numerous meetings with stakeholders from the European Parliament, European Commission and European Council ensured that

the voice of the FTTH Council Europe is heard in Brussels;

- The FTTH Council Global Alliance (FCGA) – the cooperation of all five global FTTH Councils – has further developed and become an important platform for exchange of information and experience;
- We organise our educational webinars now on a monthly basis. With more than 130 participants on average. This communication format has become a very successful way to present studies, market data and FTTH basics to a large audience;

Karin Ahl

Hartwig Tauber

- The first "Gimme Fibre Day" on 4 November 2013 was a big success. Companies, organisations and individuals all over the world celebrated this day to promote the need for FTTH for all households;
- In our new *Consumer Experience* study we asked Swedish broadband customers about their experiences with their broadband connection. The not-so-surprising result: FTTH users are happy users!
- And the FTTH Conference remains THE world's biggest FTTH-focused event!

These highlights alone show that the FTTH Council Europe is very active in spreading the word about FTTH across Europe.



A decade of ...

Founding fathers

Many significant projects start with a small group of enthusiasts. This is also true for the FTTH Council Europe. In early 2004, Meni Styliadou (Corning), Francisco Fuentes (Cisco), Jan de Groot (OSF), Paul Naastepad (Emtelle) and Torbjörn Sundquist (Ericsson) came together to discuss the idea of a European industry organisation to promote fibre to the home. Three years after the foundation of the FTTH Council North America, the topic of all-fibre access networks had also gained momentum in Europe and

it was time to actively push for these future-proof networks.

These five people set up the "FTTH Council Europe" project by forming a founding board and preparing statutes and by-laws. Working groups were formed, and experts like Albert Grooten (Draka) and Wolfgang Fischer (Cisco) chaired these committees to produce the first white papers and studies.

Still in its founding phase, the first FTTH

Conference was organised in May 2004 in Brussels and received more than 250 attendees, which was considered a huge success at this time. By September 2004 more than 30 companies had expressed their interest to join the new organisation.

The five enthusiasts that lead the FTTH Council Europe in its foundation as founding board members continued to support the organisation even after a regular board was established in November 2004.



Back in 2004, my motivation, which lead to the creation of the FTTH Council Europe, was to develop a market environment favouring a "fiberized home Europe." I believed this would be instrumental to the competitiveness and well-being of European society. In fact, at that time I was witnessing significant FTTH deployment elsewhere (e.g. Japan and the US) while Europe was at a near standstill, with a few smart but isolated deployment achievements at best. Moreover, European policy and regulatory efforts were mainly focused on leveraging the existing infrastructure (i.e. copper infrastructure), completely negating the evolution promised by fibre-based access infrastructures. I had the impression that Europe was in a sort of "innovator's dilemma." As such, I thought that we as an industry needed to take a leadership role on the subject matter – hence the creation of the FTTH Council Europe.

Francisco Fuentes, Founding Father of the FTTH Council Europe 2004



The FTTH Council Europe brought the industry together and drove focus on broadband implementation in Europe. The initiative to create this organisation came not long after the Internet bubble burst. This collapse affected the industry heavily, as we all know. Our ambition was to focus on the next wave of innovation. We all sensed that this was coming and was required to develop the economy and society. We were convinced of the need to turn attention to true broadband access, not the broadband that was defined in terms of "what we can do today is enough" but "true broadband" for everybody. Broadband delivered right to the home. An ambition this far-reaching could not be accomplished by one company alone. Looking at all that has been achieved since its creation; I am proud and honoured to be part of this FTTH Council Europe initiative.

Jan De Groot, Founding Father of the FTTH Council Europe 2004



In 2001 I decided to join a small Scottish ducting company called Emtelle because of a strong belief they had, a belief I passionately shared with them: that one day all homes, businesses and possibly even machines would be connected with fibre. The tremendous promise and exciting possibilities of unlimited bandwidth would dwarf existing networks and traditional thinking in the ICT industry. Fibre access would open up a new world of innovation and creativity, change the way we learn, live, shop, socialize, are treated medically and do business. Just three years later, I was asked to become the founding President of the FTTH Council Europe. With honour and great fulfilment I still look back on the hard work we did back in 2004 to create the FTTH Council Europe. And I can't express enough how proud I am of all my successors who turned the Council into the leading industry association it is today. Driven by this same commonly shared belief.

Paul H.P. Naastepad MBA, Founding President of the FTTH Council Europe 2004

Past presidents



At the first FTTH Conference in Brussels, I suggested a new standard for broadband of "100 Mbps symmetrical" whilst a 64 Kbps definition was commonly used in those days. People thought we were crazy. Opening up the minds of an industry, legislators, engineers and investors was a great challenge. So many topics were "no-go" subjects at the time, with many arguing that there was no need for higher bandwidth. We acted on our shared belief that everyone would need, want and use massive bandwidth once it was available to them.

So, where are we 10 years later?

While many of the same debates are still fought as vigorously as they were 10 years ago and while some services like e-health and smart homes are just beginning to gain traction, many Europeans have come to appreciate, even rely on, their FTTH connection. Technologies have also advanced, giving more options for deployment.

Many of the uncertainties that existed 10 years ago are being replaced by satisfied customers, innovative business models and sound investment opportunities. Some uncertainties still exist, but I'm sure that one day all homes and businesses will have their 10 Gbps connection, leaving many to wonder how people ever thought they could do without.

Paul Naastepad – Founding President of the FTTH Council Europe 2004



When I was elected President in 2004, the organisation had just started with 30 member companies and a group of enthusiastic FTTH believers.

In those days, many people just smiled when they heard us pushing for FTTH. But we created a professional organisation with strong messages. During my time as President from 2004 to 2007, we extended our membership to more than 70 companies and our conference exceeded 1,000 attendees.

I still have the great pleasure to work for the FTTH Council Europe as Director General, and I can honestly say that this organisation is still my passion. Together with you, our members, I am looking forward to continuing the success of the FTTH Council Europe.

Hartwig Tauber – President of the FTTH Council Europe 2004-2007



I was honoured with the mandate from the members to lead and represent the FTTH Council Europe for two years. This period was characterized by a redefinition of the strategy and diversification of stakeholders.

The organisation progressed to an involved/respected "Voice of the Industry" representing more than 100 players of the FTTH industry. The attendance at our yearly conference exceeded 2,200 for Paris and Copenhagen. The FTTH Conference became THE platform and THE meeting place for all players involved in FTTH.

On a global scale, the cooperation between the FTTH Councils North America, APAC and Europe was intensified and joint projects like the global FTTH panorama were initiated.

During my presidency, the FTTH Council Europe grew into a mature, relevant and essential leader, and I will forever be proud of having been one of the driving forces in this process.

Joeri Van Bogaert – President of the FTTH Council Europe 2007-2009

The FTTH Council Europe has developed into a strong and powerful lobbying organisation and has become a truly global reference for FTTH-related topics. The growth of the Council in terms of membership, partners and sponsors has been phenomenal over its 10-year life span. In recent years the Council has focused increasingly on content and applications in addition to the initial topics on its agenda, such as infrastructure and technology. Attendance at the annual FTTH Conference has skyrocketed since its inception and has become the leading FTTH conference worldwide with more than 3,000 visitors.



I look forward to another successful decade in which the FTTH Council Europe will broaden its activities to become even more beneficial to all related stakeholders with the goal to help build a better planet.

Karel Helsen – President of the FTTH Council Europe 2009-2010

In 2010 I was proud to be nominated and accepted as President of the FTTH Council Europe.



The time was not without its challenges with the European financial crisis and incremental improvements to copper technology threatening to replace FTTH. We countered this with a shift of strategic focus. We produced more papers and public webinars on "why fibre" supported with initiatives such as an applications showroom. Ground breaking work on network financing, deployment cost modelling and technical workshops allowed us to increase our lobbying power with the European Commission, regulators and operators. Membership continued to grow, and for the first time our conference exceeded 3,000 attendees, ensuring its place as the largest FTTH event worldwide.

But most of all I will remember the people involved in the Council, their enthusiasm, support and commitment.

Chris Holden – President of the FTTH Council Europe 2010-2012

When I took over as President of the FTTH Council Europe, it was a challenging time for fibre broadband across Europe. Confronted by operators and governments making decisions based on short-term objectives, the Board and the team worked tirelessly to promote the positive social and economic benefits of ultra-fast fibre access networks. At the same time, the reach and influence of the Council broadened, with a continuing increase in the number of attendees at the annual FTTH Conference and a focus on sharing findings about everything from policy and regulation to future technology choices.



We are now recognised as being persistent, tireless and dedicated in our approach, with high-level competence and thorough knowledge, which we are now sharing with decision makers throughout the ecosystem. An important step forward for the organisation was recently taken in early 2014 when we opened our doors to operator observers. This clearly shows an important development in how we deliver our strong message and share technology information in the years to come.

Karin Ahl – President of the FTTH Council Europe 2012 - present



The early days

10 years ago, optical fibre was widely accepted as a core transport technology but still in its infancy as a broadband access solution.

If the benefits of fibre networks running directly into homes and businesses were going to be understood by all relevant stakeholders in the world of broadband, then somebody was going to have to make some noise about it.

This work started in the spring of 2004 when representatives from some fibre to the home companies came together to discuss the founding of an industry organisation to promote FTTH. The FTTH Council Europe was born – with the mission of accelerating the deployment of fibre access by means of information and promotion. Its job was to spread the news as widely as possible about the power of FTTH to enhance the quality of life for all European citizens.

In May 2004, the FTTH Council Europe enjoyed its first ever FTTH Conference. Some 250 participants attended the event in Brussels, which consisted of a presentation programme and a small exhibition. The format for all future FTTH Conferences was established.

The existence of the FTTH Council Europe became official on 24 September 2004, with the registration

of its non-profit association (ASBL) status in Brussels. Another landmark followed with the first official General Assembly of the Council, held on 9 November 2004 in Brussels.

The success of the first FTTH Conference was then repeated in Amsterdam in February 2005, this time attracting 450 participants.

With momentum building and the FTTH Council Europe's work already achieving recognition all over the continent, a decision was taken to hold elections for the Council's board in 2006 to allow time to elapse between General Assemblies.



2004-2005

Members of the Founding Board September – November 2004

- Paul Naastepad, President
- Jan De Groot
- Francisco Fuentes
- Melpomeni Styliadou
- Torbjörn Sundquist

Members of the Board elected November 2004

- Hartwig Tauber, President
- Jan De Groot, Treasurer
- Francisco Fuentes, Secretary General
- Jean-Pierre Lartigue
- Steven King
- Martin McCourt
- Torbjörn Sundquist

Committee Chairs elected November 2004

- Maura Murray, Chair Communication & Events Committee
- Rami Houbby, Chair Market Development Committee
- Wolfgang Fischer, Chair Network Architecture Committee
- Albert Grooten, Chair Network Infrastructure Committee
- Melpomeni Styliadou, Chair Policy & Regulation Committee
- Vladimir Prodanovic, Chair Services, Applications & Content Committee



Gathering pace

Measurement is key to the success of any project. A year on from its foundation, the FTTH Council Europe conducted its first European *Market Panorama*, delivering a full overview of all FTTH projects in Europe.

Spreading the word about FTTH is a global challenge, not just a European one. After the creation of the FTTH Councils in North America (2001) and Europe (2004), in the summer of 2005 the FTTH Council Asia-Pacific (APAC) was founded to spread further the fibre access message.



Then, in October at the annual conference of the FTTH Council North America in Las Vegas, the International Advisory Group (IAG) was founded with the aim of intensifying cooperation between the three global Councils.

Meanwhile in Europe the first biannual General Assembly of the FTTH Council Europe was held in Paris with the central theme of messaging and communication.

In February 2006, the FTTH Council Europe's third FTTH Conference took place in Vienna, attendance jumping significantly to 850 participants. The Council's second year of operations concluded with elections of the Board at the General Assembly in Stockholm on 25 April 2006.

2005 - 2006

Members of the Board elected April 2006

- Hartwig Tauber, President
- Jan De Groot, Treasurer
- Francisco Fuentes, Secretary General
- Mats O. Hansson
- Rami Houbby
- Jean-Pierre Lartigue
- Tadhg Leonard
- Joeri Van Bogaert
- Tibor Van Melsem Kocsis

Committee Chairs elected April 2006

- Wolfgang Fischer, Chair Architecture Committee
- Kathleen De Smedt, Chair Communications Committee
- Albert Grooten, Chair Infrastructure Committee
- Floyd Wagoner, Chair Market Development Committee
- Vladimir Prodanovic, Chair Contents & Services Committee
- Olivier Danthine, Chair Regulatory Committee

Global accord

In recognition of the need for common global standards, August 2006 saw the first version of a globally agreed set of definitions of common FTTH and FTTB terms. Having common definitions across the industry is essential to ensure that the market data of all regional Councils can be compared and meaningful conclusions drawn.

Around this time, the FTTH Council APAC organised its first conference in Tokyo, and the FTTH Council Europe was asked to deliver a keynote speech at the European Conference on Optical Communications 2006 (ECOC) in Cannes. The Council's biannual General Assembly was held in Denmark on 17 October 2006.

2006 ended with the Board of the FTTH Council Europe defining a new structure for itself and a new strategy for messaging to be presented to members at the following General Assembly. One of the recommendations was for a full-time Director General to manage the activities of the Council and take the organisation to a new level.

The first version of a technical *FTTH Handbook* was completed, discussing

the passive FTTH network in a neutral way.

The fourth FTTH Conference in Barcelona was another triumph, this time attracting 1,200 participants, the first time that more than 1,000 people attended, proving that the Council's message was reaching the right ears.

At the election for the General Assembly on 16 April, Joeri Van Bogaert was elected to the position of President.



2006-2007

Members of the Board elected April 2007

- Joeri Van Bogaert, President
- Jan De Groot, Treasurer
- Christian Emborg
- Wolfgang Fischer
- Mats O. Hansson
- Jean-Pierre Lartigue
- Klaus Kammermeier
- Sophie Pautonnier
- Tibor Van Melsem Kocsis

Committee Chairs elected April 2007

- Kathleen De Smedt, Chair Communications Committee
- Karel Helsen, Chair Deployment & Operations Committee
- Floyd Wagoner, Chair Market Intelligence Committee
- Roland Kohler, Chair Network & Service Revenues Committee
- Olivier Danthine, Chair Policy & Regulation Committee



Sustainability matters

With the need for clarification of the environmental benefits of fibre to the home over other forms of broadband networks, the FTTH Council Europe's SUDEFIB committee was founded in April 2007 to research the environmental impact of fibre access.

Later that year, the FTTH Council Europe carried out its first ever study on the environmental impact of FTTH networks. The clear conclusion was that an FTTH network is a sustainable network, with green benefits for individuals and for communities.

In July, the Council appointed Hartwig Tauber as Director General with responsibility for managing the Council's affairs.

The first *Global Ranking* was presented in Beijing in July 2007, with findings based on the aggregated global market data of all three FTTH Councils. In August 2007, the time had come for Europe's investor community to hear the FTTH message. For the first time, the FTTH Council Europe presented its ideas and findings in front of a gathering of investment professionals in Frankfurt. At the biannual General Assembly on 23 October in Brussels, a new FTTH Council Europe website was launched.

The FTTH Council Europe then conducted its *Broadband Usage* study, proving that FTTH adopters use

between three to five times more bandwidth capacity than other broadband subscribers. Truly, if you give people the extra bandwidth, they will use it. The conclusion was that download speeds of more than 100 Mbps would need to be widely in place by 2015.

The fifth FTTH Conference in February 2008 exceeded expectations with over 2,000 participants, while a successful regulatory workshop was held in Brussels on 8 April 2008.

A new Board was elected at the General Assembly in Amsterdam on 22 April.



2007 - 2008

Members of the Board elected April 2008

- Joeri Van Bogaert, President
- Sophie Pautonnier, Treasurer
- Kathleen De Smedt
- Christian Emborg
- Wolfgang Fischer
- Karel Helsen
- Christian Ollivry
- Roberto Santini
- Galit Wellner

Committee Chairs elected April 2008

- Chris Holden, Chair Deployment & Operations Committee
- Floyd Wagoner, Chair Market Intelligence Committee
- Simon Aspinall, Chair Network & Service Revenues Committee
- Olivier Danthine, Chair Policy & Regulation Committee
- Joannes De Wilde, Chair Sudefib Committee

Setting new records

The FTTH Council Europe kicked off its fifth year of existence with the announcement of a record number of studies aimed at proving the necessity for fibre access.

This ambitious programme of activity included the creation of the *FTTH Environmental Configurator* – a way for interested parties to calculate the individual environmental impact of their FTTH networks or projects, using a simple web-based tool.

The *Portfolio of Services* study was the first investigation of FTTH and broadband services that considered their wider impact.

The *Market Panorama* and *Market Forecast* studies were instituted as regular projects, the former to be updated twice a year, and the latter once a year. A *Socioeconomic Benefits* study was also launched to investigate the social and economic benefits of FTTH and to demonstrate that it can improve the quality of life.

The FTTH Council Europe's technical *FTTH Handbook* received an update, with a new section describing the active side of FTTH networks.

Then, in autumn 2008 a strategic process was successfully concluded by which members defined a new vision and mission statement for the FTTH Council Europe.

The FTTH Council Europe's General Assembly took place in Copenhagen on 6 October, with the same city set to host the FTTH Conference 2009.

An update of the Councils' *FTTH definitions* document was then finalised by all three councils in January 2009.

At the FTTH Conference in February, tough global economic conditions didn't stop 2,200 people attending, along with a record 71 exhibitors.

At the General Assembly in Amsterdam on 31 March, the members approved new statutes and elected a new President – Karel Helsen. The following biannual General Assembly in Lisbon marked the FTTH Council Europe's fifth birthday celebration.

2008-2009

Members of the Board elected April 2009

- Karel Helsen, President
- Sophie Pautonnier, Treasurer
- Karl Bauer
- Kathleen De Smedt
- Wolfgang Fischer
- Martin Hatas
- Chris Holden
- Richard Thomas
- Galit Wellner

Committee Chairs elected April 2009

- Albert Grooten, Chair Business Committee
- Eric Festrats, Chair Deployment & Operations Committee
- Thomas Kallstenius, Chair Market Intelligence Committee
- Frank Beyrodt, Chair Network & Service Revenues Committee
- Olivier Danthine, Chair Policy & Regulation Committee
- Laurent Gasca, Chair Sudefib Committee

Working Groups Chairs of 2009

- Faris Awartani, Chair Middle East Working Group
- Galit Wellner, Chair Israel Working Group



Next level

Year six of the FTTH Council Europe brought an intensified focus on communications. With the arrival of Nadia Babaali as Communications Director in April 2009, external communications support was also enhanced with a new PR agency network, ComUnity.pro, to ensure better coordination with local agencies and deeper reach within target countries.

The FTTH Council Europe's already well-established *European Market Panorama* showed that several Nordic and Eastern European countries had been making good progress in FTTH deployment. Portugal and France were also on the radar. However, the study underlined the slow pace at which Europe as a whole – and the UK and Germany in particular – was moving, demonstrating the extent to which the FTTH Council Europe's role in promoting FTTH across Europe is vital!

To help break down barriers to FTTH deployment, the FTTH Council Europe published the first version of the *FTTH Business Guide*, to provide investors and deci-

sion makers with the tools necessary to create a sound business case for FTTH. The *FTTH Handbook* was also updated with extensive new information on network testing and a more comprehensive look at both passive and active infrastructures.

The FTTH Council Europe also commissioned several studies to further reveal hazards and opportunities in the FTTH business case. One study looked at *Successful Service Strategies for FTTH Operators*, which showed that operators can expect significant revenue uplift from FTTH.

Another study – the *FTTH Benefit Compendium* – mapped out the players in the FTTH ecosystem and looked at the benefits of FTTH from different per-

spectives – including homeowners and building managers, local authorities and utilities, ISPs and over-the-top network service providers. The study also looked at the benefits of future FTTH-enabled services and estimated when they are expected to emerge, what level of connectivity they will require and why.

The FTTH Council Europe continued its mission to educate and inspire national and EU regulators, engaging in discussions that would lead to the drafting of the Digital Agenda for Europe. It also made big strides in convincing regulators of the need for public sector financing to bring high-speed broadband to rural areas, where the financial incentives for private investment are limited.



Held in Lisbon in 2010, the FTTH Conference was a great success, with the Portuguese Prime Minister opening the event and a record number of attendees and exhibitors, over 2,600 and 100, respectively. Following the

creation of the FTTH Middle East working group, the first FTTH Conference focusing on this region was held in Amman and welcomed over 260 delegates.

2009 – 2010

Members of the Board elected April 2009

- Karel Helsen, President
- Sophie Pautonnier, Treasurer
- Karl Bauer until 22 February 2010, replaced by Michael Bires
- Kathleen De Smedt until 28 October 2009, replaced by Thomas Kallstenius
- Wolfgang Fischer
- Martin Hatas
- Chris Holden
- Richard Thomas
- Gallit Wellner until 28 October 2009, replaced by Peleg Erlich

Committee Chairs elected April 2009

- Albert Grooten, Chair Business Committee
- Eric Festraets, Chair Deployment & Operations Committee
- Jan Schindler, Chair Market Intelligence Committee
- Frank Beyrodt, Chair Network & Service Revenues Committee
- Olivier Danthine until 28 November 2009, Chair Policy & Regulation Expert Group
- Laurent Gasca, Chair Sudefib Committee

Working Groups Chairs of 2009-2010

- Faris Awartani, Chair Middle East Working Group

Content matters

Chris Holden was chosen to lead the FTTH Council Europe as President in its seventh year of existence, a year marked by intensified engagement with regulatory decision makers and by reaching out to new stakeholders – particularly those on the content and applications side.

The *FTTH Market Panorama* indicated that Europe was finally showing signs of real growth, with 3.9 million subscribers counted in 2010 compared to 2.5 million in 2009. More significantly, when Russia was included in the count, the numbers leapt from the previous year's 3.5 million subscribers to 8.1 million.

The committees and working groups

published updated versions of the *FTTH Handbook* (4th edition) and the *FTTH Business Guide* (2nd edition), using a coordinated approach to synchronise the two guides.

A new Content and Applications Committee was created to investigate and share its findings on how all kinds of FTTH-enabled services and applications could improve the lives of Europe's citizens. Several speakers and demonstrations were invited to the FTTH Conference in Milan, to show the potential of services in e-health, e-learning and interactive TV.

On the regulatory front, the FTTH Council Europe continued its ongoing dialogue with the European



Commission. The Council welcomed the announcement of Commissioner Neelie Kroes's Digital Agenda, which sets a goal of 30 Mbps speeds or more for all European citizens by 2020, with half of all subscribers receiving a 100 Mbps connection.

Later in the year, Ms. Kroes spoke at the FTTH Conference about her new Recommendation on Regulated Access to Next-Generation Access (NGA) Networks. Both the Digital Agenda and Recommendation include several important positions that the FTTH Council Europe helped to develop and support.

On the communications front the FTTH Council Europe multiplied its contacts with the press and media,



with numerous campaigns, interviews and press releases, and organised speaking opportunities at dozens of external events. It also launched its monthly newsletter *Fibre Horizons*, and held webinars about the latest market data and new developments in FTTH technology.

Finally, workshops were a very successful new feature of the FTTH Conference 2011 in Milan, which welcomed for the first time over 3,000 participants. The second FTTH Middle East Conference in Beirut attracted participants from 30 countries and announced the United Arab Emirates' entry into the FTTH Global Ranking in fourth place worldwide in terms of FTTH/FTTB coverage.



2010 – 2011

Members of the Board elected April 2010

- Chris Holden, President
- Sophie Pautonnier, Treasurer
- Peleg Erlich until 1 January 2011, replaced by Matthias Nass
- Eric Festraets
- Albert Grooten
- Martin Hatas until 1 October 2010, replaced by Rolf Johansson
- Pastora Valero
- Paul Schwartz
- Richard Thomas

Committee Chairs elected April 2010

- Karin Ahl, Chair Business Committee
- Paul Schwartz, Chair Content & Applications Committee
- Pierre Pigaglio, Chair Deployment & Operations Committee
- Jan Schindler, Chair Market Intelligence Committee
- Hartwig Tauber, Chair Policy & Regulation Expert Group

Working Groups Chairs of 2010-2011

- Faris Awartani, Chair Middle East Working Group

Global strength

In year eight of the FTTH Council Europe, there was considerable debate around the cost of deploying FTTH. The Council launched several new tools and studies to address this question, extended the dialogue with governmental and regulatory authorities and further targeted end users in FTTH communication campaigns.

Following its release of the Digital Agenda, the European Commission calculated the cost of FTTH deployment across Europe. Questioning its results, the FTTH Council Europe conducted a more in-depth, bottom-up cost study, which demonstrated that FTTH rollout would be far less costly than initially estimated.

In its third edition of the *FTTH Business Guide*, the FTTH Council Europe published a thorough study on the financing of FTTH networks. It also included a new section on fibre-based services and applications, as well as responses to 10 of the most frequently asked questions on fibre deployment. Finally, to ensure that all stakeholders speak a common language, a new *Definitions Guide*, defining terms used worldwide, was published.

While continuing its discussions and lobbying efforts with the European Commission, the FTTH Council Europe further demonstrated its position as a major influential industry thought leader, engaging and partnering with more European and



national government regulators and industry organisations, including BEREC, ETNO and ECTA.

A record number of attendees (3,300) participated in the FTTH Conference 2012 in Munich. To further demonstrate the importance of FTTH in the development and use of new services and applications, a FTTH-enabled applications showroom was set up at the FTTH Conference, giving delegates hands-on experience with services available in e-health, teleworking, education and interactive TV and entertainment.

To further support the vision of how FTTH can change our lives, several short video clips were prepared showing various examples of how people's lives have been

transformed by FTTH access and new services requiring ultra-fast connections. An educational film *FTTH – What is it?* was also produced to explain in simple terms what FTTH is and how it differs from other forms of digital access. This clip has been highly successful and is available in 16 languages today!

While a new regional association, the FTTH Council Middle East and North Africa, was founded at the beginning of the year, the year ended with the signing of a Memorandum of Understanding among all the regional FTTH Councils setting up the FTTH Council Global Alliance, a joint working group, to better enable the regions to work together, exchange information and provide support to each other, while remaining separate as organisations.



2011 – 2012

Members of the Board elected April 2011

- Chris Holden, President
- Karin Ahl, Treasurer
- Eric Festraets
- Albert Grooten until 30 September 2011, replaced by Edgar Aker
- Jouni Heinonen
- Rolf Johansson until 1 July 2011, replaced by Martin Hatas
- Sophie Pautonnier
- Paul Schwartz
- Pastora Valero

Committee Chairs elected April 2011

- Paolo Sebben, Chair Business Committee
- Wolfgang Fischer, Chair Content & Applications Committee
- Cristina Deac, Chair Deployment & Operations Committee
- Jan Schindler, Chair Market Intelligence Committee
- Hartwig Tauber, Chair Policy & Regulation Expert Group



2012 - 2013

Members of the Board elected April 2012

- Karin Ahl, President
- Matthias Nass, Treasurer
- Edgar Aker
- Carlos Barroqueiro
- Pär Cedergren
- Eric Festraets
- Paul Schwartz
- Pastora Valero
- Gerlas van den Hoven

Committee Chairs elected April 2012

- Joeri Van Bogaert, Chair Business Committee
- Wolfgang Fischer, Chair Deployment & Operations Committee
- Jan Schindler, Chair Market Intelligence Committee
- Chris Holden, Chair Policy & Regulation Expert Group
- Ana Pesovic, Chair World of Applications Committee

Working Groups Chairs of 2012-2013

- Paolo Sebben, Chair Smart Cities Group

Investment & finance

The FTTH Council Europe began its ninth year with a new President, Karin Ahl, and a host of projects designed to expand the organisation's influence to an even larger audience, ranging from the highest-level decision makers in the European Commission all the way to individual end users.

The annual *European Market Panorama* and five-year *Forecast* highlighted the growing gap between the "winners" – countries that were steadily increasing their FTTH deployment – and the "losers" – those progressing at a snail's pace.

Several new studies on the financial aspects of FTTH were published. The first study focused on the real costs of putting in place a full fibre infrastruc-

ture in Germany to meet the Digital Agenda targets, applying the bottom-up approach developed the previous year in the Europe-wide cost model.

A study into the value of FTTH for real estate owners further demonstrated the many benefits – including financial benefits – of FTTH for housing corporations and their tenants, private homeowners and network providers.

The FTTH Council Europe had previously discovered that, despite the financial crisis, there is a huge pool of capital available for infrastructure investment projects. Access fibre projects, if structured correctly, could be highly attractive for long-term investment funds, according to its research. This led to the organisation of the first,

highly-successful Investors Day, which took place at the FTTH Conference in London.

The World of Applications Committee developed a new means to show, at first hand, the benefits of FTTH-enabled services. The new World of Applications Dome, a 100 m² area dedicated to providing hands-on experience of entertainment, teleworking, e-health and smart-home services, was installed at major events in Brussels and Paris and then at the FTTH Conference in London.

Another new area of exploration involved studying Smart Cities, how they are developed and which stakeholders are involved. A newly created Smart Cities working group published the



FTTH Smart Guide, which outlined the role of FTTH as the superfast, symmetrical and interactive nervous system for such cities, allowing them to communicate data from many sources to manage such services as traffic, lighting, health-care, power consumption and more.

Meanwhile, the FTTH Council Europe continued to develop its many other information resources, including case studies, CEO interviews, video clips, opinion articles, press releases, etc., along with new avenues of communication, including

regular webinars and the new *I want fibre* Facebook page (in addition to the FTTH Council Europe's already popular social media channels on LinkedIn, Twitter and Facebook).

The FTTH Council Europe also published a *FTTH Primer (What Fibre to the Home can do for your community)* to inform communities, including local government and citizens, of the multifaceted advantages of FTTH. The FTTH Council Global Alliance also launched its new magazine, *The Light Age*.

The year culminated with the 10th anniversary FTTH Conference in London, which once again exceeded 3,000 participants and had more exhibitors than ever before.



Focus & alliances

The tenth year of the FTTH Council Europe was a year of consolidation – ensuring that the organisation is making best use of the extensive resources and market information that it has developed over the past decade – and it was also a year of celebration.

Having established itself as an expert source on next-generation broadband networks, the Council made sure its voice was heard in Brussels. The Council called for the adoption of measures to help reduce deployment costs and create investment opportunities – two of the main issues that are hindering the acceleration of FTTH adoption in Europe. Recommendations for policy makers were also published in a position paper.

The FTTH Council Europe continued to engage with the financial community directly, to educate them about fibre-optic infrastructure and its potential as an attractive and profitable long-term investment opportunity. The aim is to help the financial community overcome barriers to investment, and match projects with appropriate sources of funding. Three very successful Investors Day workshops were held during the year in Helsinki in September 2013, Brussels in October 2013 and Stockholm in February 2014 (collocated with the FTTH Conference).

Consumers were also a key part of the Council’s strategy in 2013/14. The World of Applications Dome, a 100 m² area dedicated to demonstrating

and providing hands-on experience of fibre-enabled applications and services, was set up at a major event in Eindhoven.. The year also included a successful Facebook competition, where broadband users were invited to post a creative photo or video illustrating the best or worst aspects of their broadband experience.

The FTTH Council Europe strengthened links with its sister Councils in the Global Alliance by launching a joint annual “Gimme Fibre Day” to encourage people from all over the world to celebrate how optical fibre has positively impacted their communities. The date of this annual celebration of fibre optics – 4 November – was selected because it corresponds with the birthday of Nobel Prize winner Sir Charles

Kuen Kao. Often described as “the father of fibre optics”, Sir Kao was awarded the 2009 Nobel Prize in Physics for his work to calculate that it was possible to transmit light over very long distances in low loss optical fibres, laying the foundation for today’s networked society.

With the theme of “Showcasing a Brighter Future”, the FTTH Conference visited Stockholm in Sweden. By bringing the event to a city and region with a strong track record in FTTH as well as digital applications such as online gaming, the FTTH Council Europe hoped that other nations would be inspired by the example. Conference delegates also gained practical guidance across all aspects of FTTH – including business models, financing and value-added services – which they could take back home and use to promote FTTH deployment in their own countries. The conference was live streamed to “virtual delegates” for the first time – taking advantage of the venue’s fibre-optic connectivity to reach a wider audience.



2013 – 2014

Members of the Board elected April 2013

- Karin Ahl, President
- Matthias Nass, Treasurer
- Edgar Aker
- Carlos Barroqueiro
- Pär Cedergren
- Werner De Wolf
- Eric Festraets
- Pastora Valero
- Gerlas van den Hoven

Committee Chairs elected April 2013

- Rong Zhao, Chair Deployment & Operations Committee
- Joeri Van Bogaert, Chair Finance Committee
- Jan Schindler, Chair Market Intelligence Committee
- Hartwig Tauber, Chair Policy & Regulation Expert Group
- Paolo Sebben, Chair Smart Cities Committee
- Ana Pesovic, Chair World of Applications Committee

Findings

2013/2014 - Findings

Tech Talk

Technology never stands still. Every year sees new invention, innovation and engineering development of core technologies in the fibre to the home world. The Deployment and Operations Committee, which keeps abreast of technical changes, published two white papers and a briefing note describing recent and upcoming advances in FTTH technologies.

Convergence of voice and data services onto a single optical network proved to be the right choice for regional and core fibre-optic networks; operators now see that similar efficiencies could be achieved in the access network by merging optical access with wireless backhaul networks. By 2020 it is estimated that there will be as many as 50 billion connected devices using fixed and mobile broadband networks combined.

The white paper *New FTTH-based Technologies and Applications* takes a closer look at the latest innovations in fibre technology. New solutions for PON, WDM-PON and point-to-point FTTH networks make it possible to further increase the bandwidth and quality parameters of fibre networks.

Meanwhile, it has become increasingly obvious that FTTH will also play an important role as backhaul for mobile networks. A combination of fibre connections at the customer premises and small cell architecture will help to solve the mobile traffic offload challenge. This will enable the ubiquitous Internet to offer new services and applications as a seamless multi-screen / multi-device experience.

The second white paper on *Innovative FTTH Deployment Technologies* examines alternative construction techniques and equipment that can lower the cost of building FTTH networks. The investment requirements for FTTH have decreased substantially in recent years, as a result of the growing maturity of the industry and its supply chain, but there is still scope for further cost reduction, especially in rural locations. While cost of fibre deployment is only one aspect of the business case, it is an important one. Reducing the cost of deployment could dramatically speed up the pace of FTTH rollout in Europe.

The deployment methods described in the white pa-



per are not yet in widespread use and are therefore not accepted as “standard” techniques. They include innovative ways for operators to share infrastructure with each other and other utilities, efficiency improvements through streamlined installation methods, and the use of labour-saving tools and components. Customer self-installation becomes possible when the process is sufficiently de-skilled, ruggedized and simplified. Standard techniques have been developed and refined in urban areas; lateral thinking can lead to significant cost reductions for projects in rural locations.



The last few metres of cable that connect behind the customer’s front door are often the most expensive to install. The briefing paper *G.Fast – An Introduction* examines an emerging high-speed copper technology that is capable of delivering a combined upstream and downstream data rate of 1 Gbps over copper twisted-pair cable. But the increase of speed is only available on very short copper loops of less than 100 metres. This is usually all that is required for fibre to the building installations. Consequently, the FTTH Council Europe considers the combination of FTTH with G.Fast as a solution for incumbents to face the challenge of DOCSIS 3.0. However, the briefing paper makes it clear that the FTTH Council Europe does not support any kind of installation of G.Fast outside the house (FTTC).

FTTH by the Numbers

The annual *FTTH Market Panorama and Market Forecast* reports, commissioned by the Market Intelligence Committee, paint a portrait of progress in FTTH deployment across Europe. The results for 2013 are encouraging, with the number of FTTH subscribers increasing by 29% in Europe and slightly faster when the dynamic nations of Russia and the Ukraine are included. By the end of the year, 34 global and 23 European countries had reached the threshold of more than 1% of homes directly subscribing to fibre (penetration).

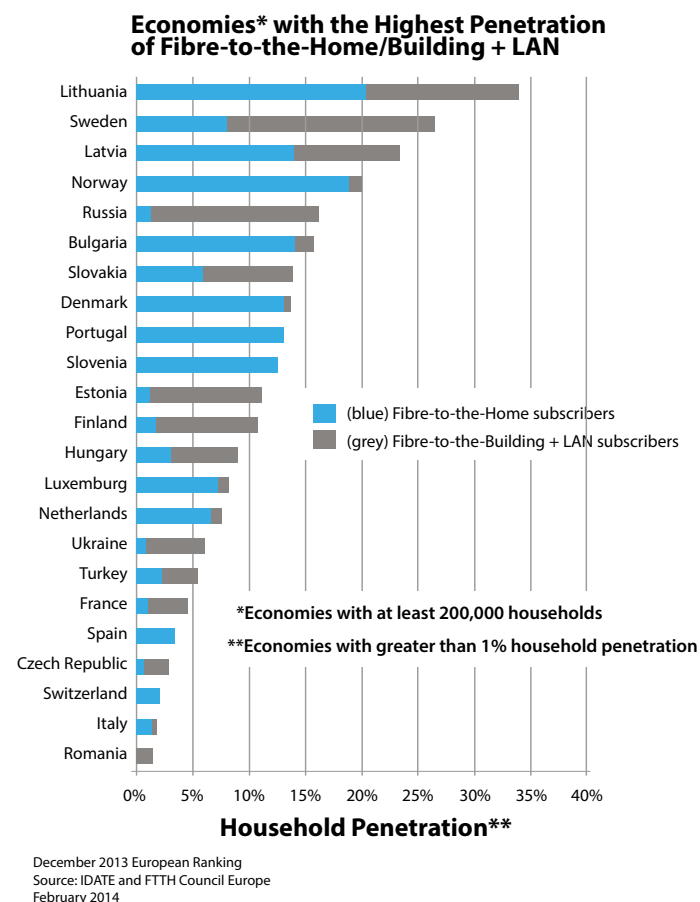
If the FTTH Council Europe issued a report card, however, it would probably read “good but could do better.” According to market research firm Heavy Reading, a country only reaches “fibre maturity” when 20% of its households are FTTH/B subscribers. This metric is

important, because it represents the point at which the customer base is considered large enough to support the development of new high-speed services and applications. So far only nine countries around the world have reached this threshold, and only three of them are European. Europe as a whole is expected to reach this target by 2022.

Around the world, the United Arab Emirates leads the *Global FTTH Ranking* with an impressive 85% of homes subscribing to FTTH/B, followed by South Korea, Hong Kong, Japan, Singapore and Taiwan, with subscription rates ranging from 63% to 37%. The first European country in the *Global FTTH Ranking* is Lithuania, in seventh position with 100% coverage (homes passed) and 34% penetration (subscribers), followed by Sweden at 26.5% and Latvia at 23.3%. All other European economies remain below the 20% threshold, and some – notably Germany and the U.K. – remain conspicuous by their absence.

In the first study of its kind, the FTTH Council Europe commissioned a survey of broadband users to find out about their attitudes towards fibre-based broadband compared with copper-based DSL. The results of the survey of 400 Swedish broadband users, carried out in December 2013, aimed to discover users' attitudes towards broadband. Sweden was selected because it is a mature FTTH market – if there is a difference then it is likely to show up there first.

And it did. A full 45% of FTTH/B users declared themselves "very satisfied" with their broadband, compared to only 28% for DSL users – an extremely high satisfaction level for a survey of this type. FTTH/B users were more satisfied than DSL users on all technical parameters, such as upload speed, download speed and reactivity (latency). Satisfaction levels were particularly high amongst gigabit subscribers (50%). Regardless of technology, satisfaction was much lower among users on connection



speeds less than 100 Mbps. Clearly, speed does matter to consumers!

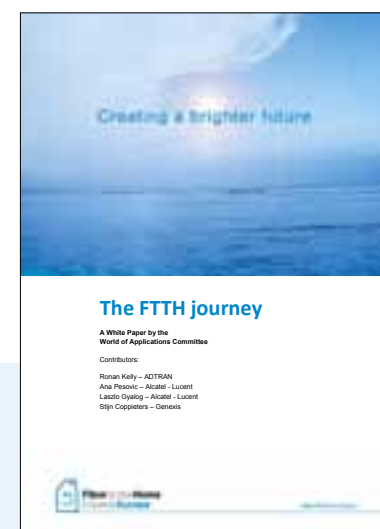
The World in Your Pocket

Imagine, in the not-so-distant future, being always online, whether at work or play. You can connect seamlessly to the Internet, in any place, at any time. Connectivity will become just another utility, something we simply take for granted. Is this a pipe dream? Maybe not, says the

World of Applications Committee, which published a white paper on the evolution of digital connectivity. *The FTTH Journey* examines the history of the Internet – to establish that what seemed impossible at any given time often became ordinary just a few years later.

When we consider how much the Internet has changed our lives over the past 20 years, and how we failed to anticipate just how fundamental that change would be, we should realise that the Internet has not lost its ability to dramatically change lives. FTTH networks will enable countless inventions that will make our lives easier, more productive, healthier, safer and more fun. When optical access becomes commonplace, only then will the world begin to understand the meaning of "unlimited".

All publications and summaries of mentioned studies are available as free downloads on the FTTH Council Europe website.



Communications



Showcasing a Brighter Future

FTTH Conference 2014
11th edition
18-20 February,
Stockholm

Opening Ceremonies
Speeches from:



Gunnar Hökmark,
Member of European
Parliament



Sten Nordin, Mayor of
the City of Stockholm



Pearse O'Donohue, Deputy
Head of Cabinet of Vice-
President Neelie Kroes,
European Commission

Anna-Karin Hatt, Swedish Minister for Information
Technology and Energy

Göran Marby, Director
General of the Swedish
Post and Telecom
Authority (PTS) and
Chairman of BEREC



Keynote Speech by Dr David
Bosshart, CEO of the Gottlieb
Duttweiler Institute for economic
and social studies (GDI)

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

FTTH Conference 2014 raises "green donation" for
environmental organisation Naturskyddsföreningen
(Swedish Society for Nature Conservation)



The largest FTTH event
in the world!
More than 3,000 participants
from 84 countries

12 parallel workshops on
the first day



FTTH Council Europe
Awards: Operator Award
was given to Vodafone,
Individual Award was
given to Nobel Prize winner
Charles Kao



Live talks & clips

Live talk shows

NEW

Live talk shows provided a taste of what was coming up at the FTTH Conference 2014. You can replay these live talk shows on www.tv.ftthcouncil.eu. Our channel also offers some highlights of the FTTH Conference 2014, including the keynote speeches and the studio talks.



Video clips



We also continue to share our other audio-visual content, such as our video clips, which are all available on YouTube and Daily-Motion.

The *FTTH - What is it?* clip comes in 4 new languages: Norwegian, Portuguese, Romanian and Swedish. This makes a total of 16 languages: Arabic, Danish, English, Finnish, French, German, Hungarian, Italian, Lithuanian, Norwegian, Polish, Portuguese, Romanian, Spanish, Swedish and Turkish.

Events & media

Events

3 FTTH Investors Days in Helsinki, Brussels and Stockholm

NEW



The following activities took place at events in 17 countries (Austria, Belgium, Croatia, Finland, France, Germany, Greece, Netherlands, Norway, Poland, Russia, Serbia, Slovenia, Sweden, Switzerland, UK and Ukraine):

- 38 speakers
- 16 contra-agreements
- 3 booths
- 3 C.R.E.D.O. demos
- 2 IMC University of Applied Science Demos
- 1 World of Applications Dome.



Resources

35 Case Studies from 20 countries

Andorra, Austria, Denmark, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Portugal, Republic of Macedonia, Russia, Spain, Sweden, Switzerland, UK

17 CEO interviews



Webinars

As in previous years, we also organised a number of very successful webinars. The objective is to present our most compelling studies, such as the FTTH Market Panorama, to the telecom world and wider community, in a highly accessible manner. Analysts take a half hour to present their findings and then give the audience the opportunity to ask questions.



Fibre Horizons, our monthly newsletter with news about FTTH Council Europe activities and findings, now reaches more than 8,880 subscribers. Subscribe online!



Subscribe via RSS to our Case Studies / CEO Interviews / Media Update / Press Releases / News



Press relations

- 80 interviews with media in 12 countries
- 17 press releases and 6 opinion pieces in 9 languages Dutch, English, French, German, Greek, Polish, Portuguese, Romanian, Swedish
- 264 press clippings in various languages from a range of sources including key national media Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Portuguese, Romanian, Spanish, Swedish, Turkish
- Monthly Media Update now sent out to nearly 4,000 media contacts



Gimme Fibre Day

 **4 November 2013 – The first ever Gimme Fibre Day!**


 The FTTH Council Europe was informed about activities in 14 European countries, which were featured in our online **Gimme Fibre Day** programme. A contest was launched on our 'I want fibre' page on Facebook in 3 languages (English German French). Participants posted photos and videos expressing what having (or not having) fibre means to them.



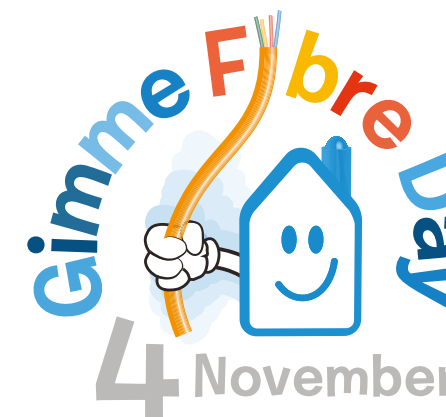
Photo winner – Marc Dufix (France)



Video winner – Espen Schiager (Norway)



The FTTH Council Europe channel on www.tv.ftthcouncil.eu featured a special live **Gimme Fibre Day** talk. The channel also broadcasted fibre-related topics throughout the day!



Don't miss out! Because it's YOUR day!

On 4 November, people all over the world will celebrate the inaugural **Gimme Fibre Day**, an annual "event" created by the FTTH Councils Global Alliance* to celebrate the only future-proof broadband access solution and showcase how fibre has positively impacted communities across the world.

Organise your own **Gimme Fibre** activity (on 4 November) and let us know what you are up to. We invite you to organise events, product launches, special customer offers, etc.

Showing your commitment to FTTH is easy. Just request your **Gimme Fibre Day** visuals kit by sending an email to gimmefibre@ftthcouncil.eu and promote YOUR day however you want.

* The FTTH Council Global Alliance consists of the FTTH Council Africa, FTTH Council Americas, FTTH Council Asia Pacific, FTTH Council Europe and FTTH Council Middle East & North Africa

The date for this annual celebration of fibre optics was selected because it corresponds with the birthday of Nobel Prize winner Sir Charles Kuen Kao, the man who changed the way the world communicates. Sir Kao was jointly awarded the 2009 Nobel Prize in Physics for "ground-breaking achievements concerning the transmission of light in fibres for optical communication".

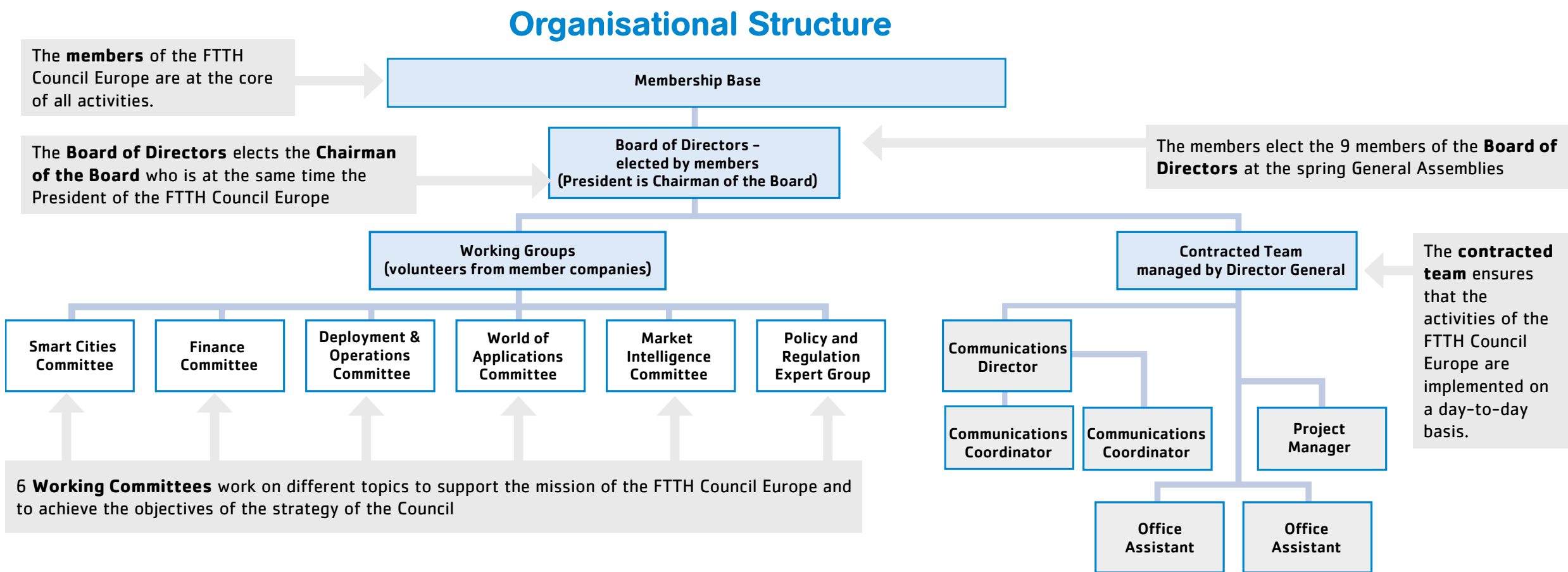
All and more on **Gimme Fibre Day** soon on
www.gimmefibre.eu





People

Organisation



Team

Susan Svoboda, Communications Coordinator
Andrea Haider-Pachtrog, Office Assistant
Doris Krenn, Office Assistant



Michaela Fischer, Project Manager
Hartwig Tauber, Director General
Sally Van den benden, Communications Coordinator
Nadia Babaali, Communications Director

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



Werner De Wolf,
Member of the Board



Eric Festraets,
Member of the Board



Pastora Valero,
Member of the Board



Gerlas van den Hoven,
Member of the Board

Committees

Rong Zhao,
Deployment &
Operations Committee



Joeri Van Bogaert,
Finance Committee



Jan Schindler,
Market Intelligence
Committee



Paolo Sebben,
Smart Cities Committee



Ana Pesovic,
World of Applications
Committee



Hartwig Tauber,
Policy & Regulation
Expert Group



Finance Committee

The Finance Committee has started the "FTTH Council Europe Investors Project" to study further the financing of fibre networks. The successful "Investors Days" in London, Helsinki, Brussels and Stockholm established the FTTH Council Europe as an important source of information on FTTH financing, bringing investors together with the relevant projects.

Deployment & Operations Committee

This committee discusses all technical aspects of fibre networks, which include the passive and active parts of the network, as well as the deployment methods, network architectures and new fibre technologies. The Deployment & Operations Committee prepared white papers on innovative deployment methods and new access technologies.

D&O Project Managers:

- Rong Zhao, Detecon International FTTH Handbook
- Tony Stockman, Condux International Innovative FTTH Deployment Technologies whitepaper
- José Salgado, PT Inovação e Sistemas New FTTH-based Technologies and Solutions whitepaper
- Thomas Martin, Calix Standard presentation
- Tobias Ahl, Rala Infratech Passive Infrastructure for FTTH standard presentation
- Eric Festraets, Alcatel-Lucent G.Fast 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 answer to this question. Key achievements of this committee have been the creation of the "World of Applications Dome" as well as the set up of the "Fibre Journey" timeline.

WoA Committee Project Managers:

- Ronan Kelly, ADTRAN FTTH Journey whitepaper
- Ana Pesovic, Alcatel-Lucent, & Mathieu Prange, General Cable/Silec Cable "Online Supermarket" of broadband services

Market Intelligence Committee

The objective of the Market Intelligence Committee is to provide information to the FTTH Council Europe about the latest market data and market developments. This objective includes topics like FTTH in real estate and the 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 Europe
- Jan Schindler, Prysmian Group Global Market Panorama
- Joeri Van Bogaert, Capabilities Consumer Experience 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 developing and maintaining contacts to the European Commission and regulators as well as organising workshops and input for national and regional policy makers.

Smart Cities Committee

The Smart Cities Committee has developed a wide range of activities to showcase the need for FTTH in Smart Cities and Regions. This includes publishing the "FTTH Smart Guide" as well as giving presentations at Smart Cities conferences.

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 regional FTTH Councils. All of the 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 allows the FTTH Councils to use their individual strengths to adapt their activities to the particular market situation in their area. The FTTH Council Global Alliance ensures that those regional efforts are supported by the power of global cooperation. Within the FCGA the FTTH Councils exchange studies, information and latest market developments. Joint projects – such as *The Light Age* magazine – enable global activities and intercontinental networking.

Global partnerships with organisations like ITU-D underline the value of the global cooperation of the FTTH Councils. By creating and updating the *FTTH Global Ranking*, the FCGA provides one of the most widely used market statistics about FTTH around the world. New developments in technology and market models are exchanged between the FTTH Councils to ensure that all FTTH stakeholders worldwide have access to the latest information. By joining a FTTH Council, the members also benefit from this global cooperation through the FCGA.



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
FTTH Council Africa	South Africa	2012
FTTH Council Middle East & North Africa	Jordan	2012
Dansk Energi	Denmark	2013
FIRIP	France	2013
Norsk Fiberforening	Norway	2013

The Light Age – the global FTTH Magazine of the FTTH Council Global Alliance





Resources and publications

Publications:

- Fibre Horizons – Monthly Newsletter
- The Light Age – A Global FTTH Magazine
- FTTH Handbook – Sixth Edition
- FTTH Smart Guide – Second Edition
- Case Study Collection
- White Paper: New FTTH-based Technologies and Applications
- White Paper: Innovative FTTH Deployment Technologies
- White Paper: The FTTH Journey
- Paper: G.Fast – An Introduction

List of studies:

- FTTH Market Panorama Europe
- FTTH Market Panorama Middle East & North Africa
- FTTH Market Forecast 2013 – 2018
- Study: The Consumer Experience Study

FTTH Council Europe channel: www.tv.ftthcouncil.eu

List of video clips:

- Living with FTTH in Kilafor, Oberhausen, Nuenen and Utrecht
- FTTH – what is it? (in 16 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



See you at the next **FTTH Conference**
in **Warsaw** on **10-12 February 2015**

