



IDATE
Consulting

Understanding the Digital World

FTTH/B Panorama

Europe (EU39) at September 2015

52079 - Luxembourg– FTTH Conference – February, 18th, 2016

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 **DIGIWORLD**
by IDATE

FTTH/B Panorama - Europe (EU39) at September 2015

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1. Study background

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> Mission on behalf of the FTTH Council Europe – 14th edition

> 39 countries analyzed

- For each country, IDATE provides data per player for FTTH/B and other fiber-based architectures
- Each player is characterized via dedicated parameters: technical, financial, business model, figures



> Methodology: bottom-up approach

- Desk research
- Direct contacts with leading players and IDATE's partners in the countries
- Information exchange with FTTH Council Europe members

> Results

- Both quantitative and qualitative data, presenting the status in the country and the strategic approach of involved players



General overview and main trends

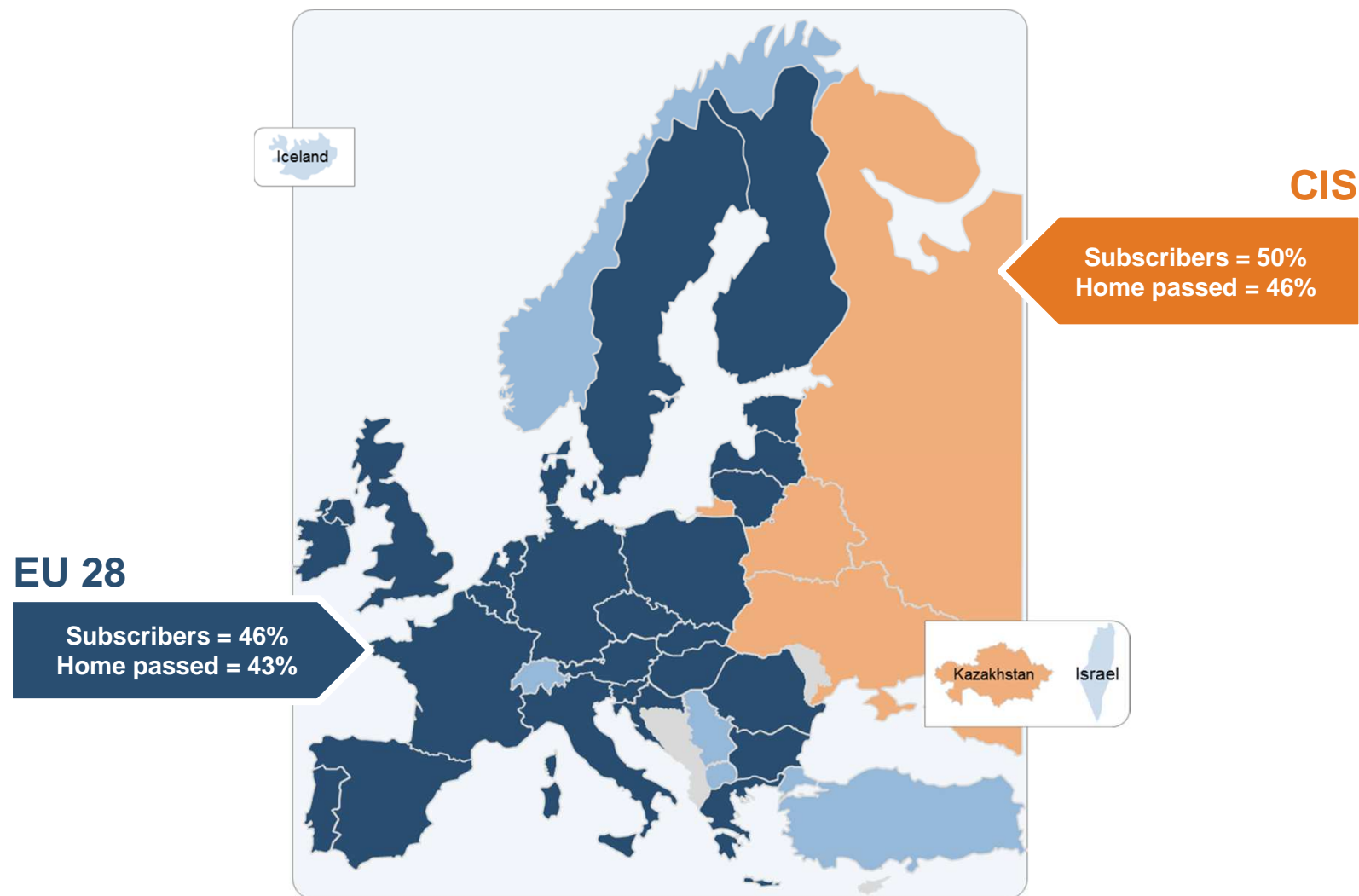
Figures at September 2015 and focus in EU28

Historical data and growing trends

Main categories of players

FTTH/B figures at September 2015

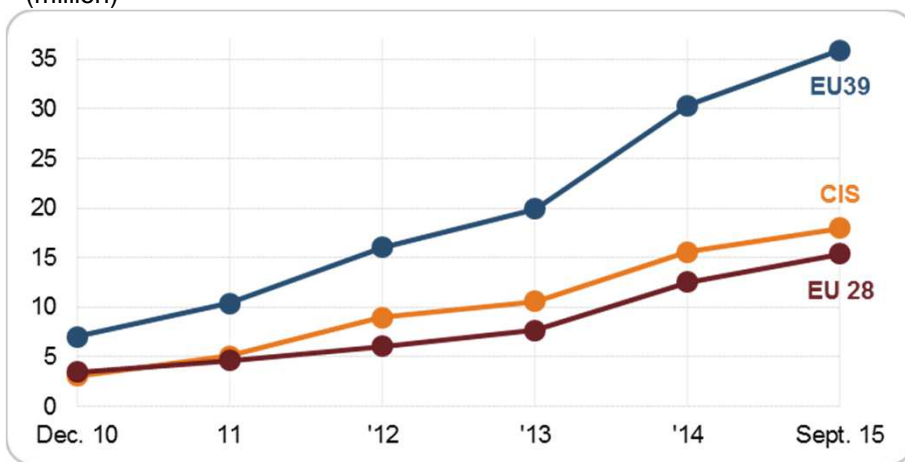
There were more than 35.9 million FTTH/B subscribers and nearly 127 million FTTH/B Homes Passed in EU39 at September 2015



Historical data and growing trends

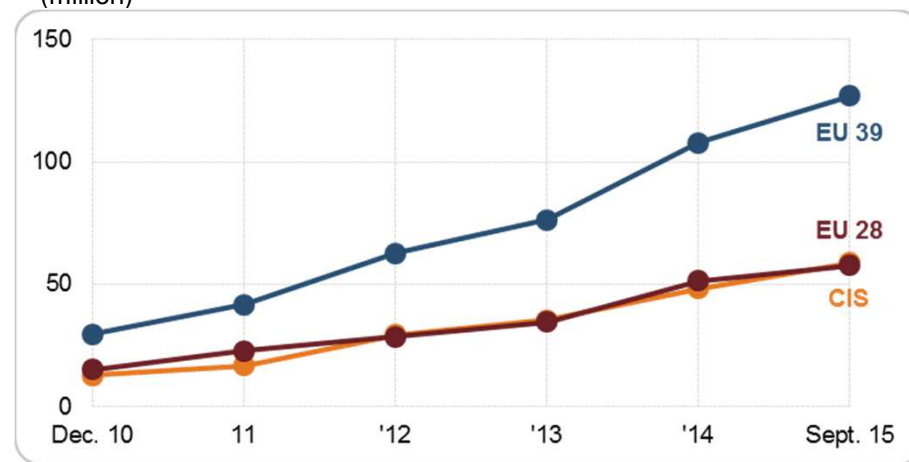
- > Interesting dynamism of the European Union since 2013
- > CIS countries : higher growth rates for subs than for HP between January and September 2015
- > Globally: little slow down during the first 9 months of 2015... a short break before the real start?

Growth of FTTH/B subscribers since 2010
(million)



Source: IDATE for FTTH Council Europe

Growth of FTTH/B Homes Passed since 2010
(million)



Major projects / categories of players

> 336 analyzed FTTH/B projects in EU39 at September 2015:

- There are less and less new projects from one year to another
- All major operators are involved in each country, among which 35 incumbents at least
- There will probably be more and more small players involved in local deployment in the coming years

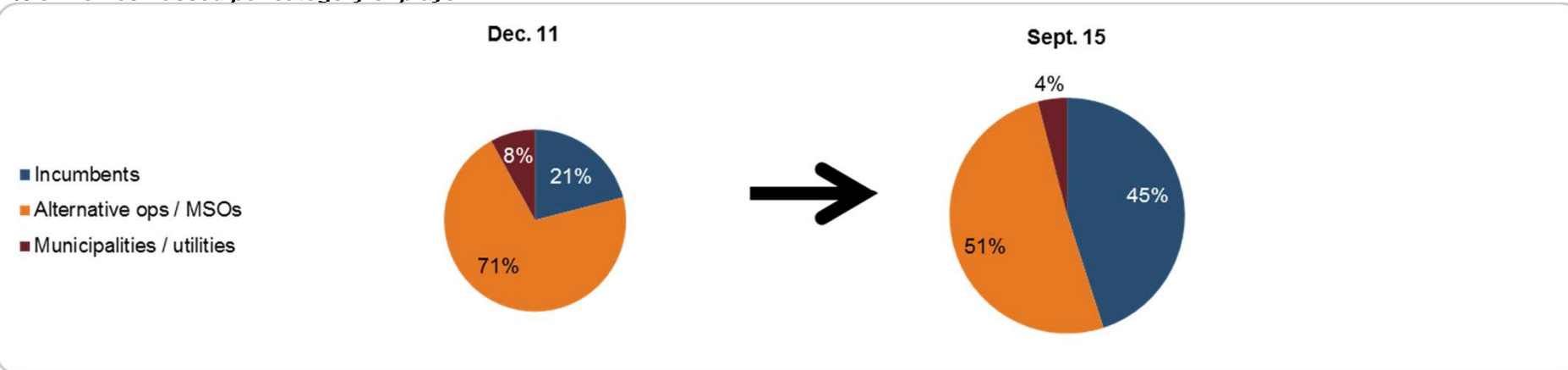
> Incumbents now represent 45% of the total number of Homes Passed

- This ratio was only 21% at end 2011
- **Alternative players**, which promoted FTTH/B in most countries since 2008-2009, now represent 51% of the total number of HP

> The market is clearly dominated by those two categories of players.

> But municipalities, along with utilities when appropriate, will remain those ones that will help ensure an exhaustive coverage at term

% of Homes Passed per category of player



Source: IDATE for FTTH Council Europe

Leading countries

General ranking HP & subscribers

Highest growths

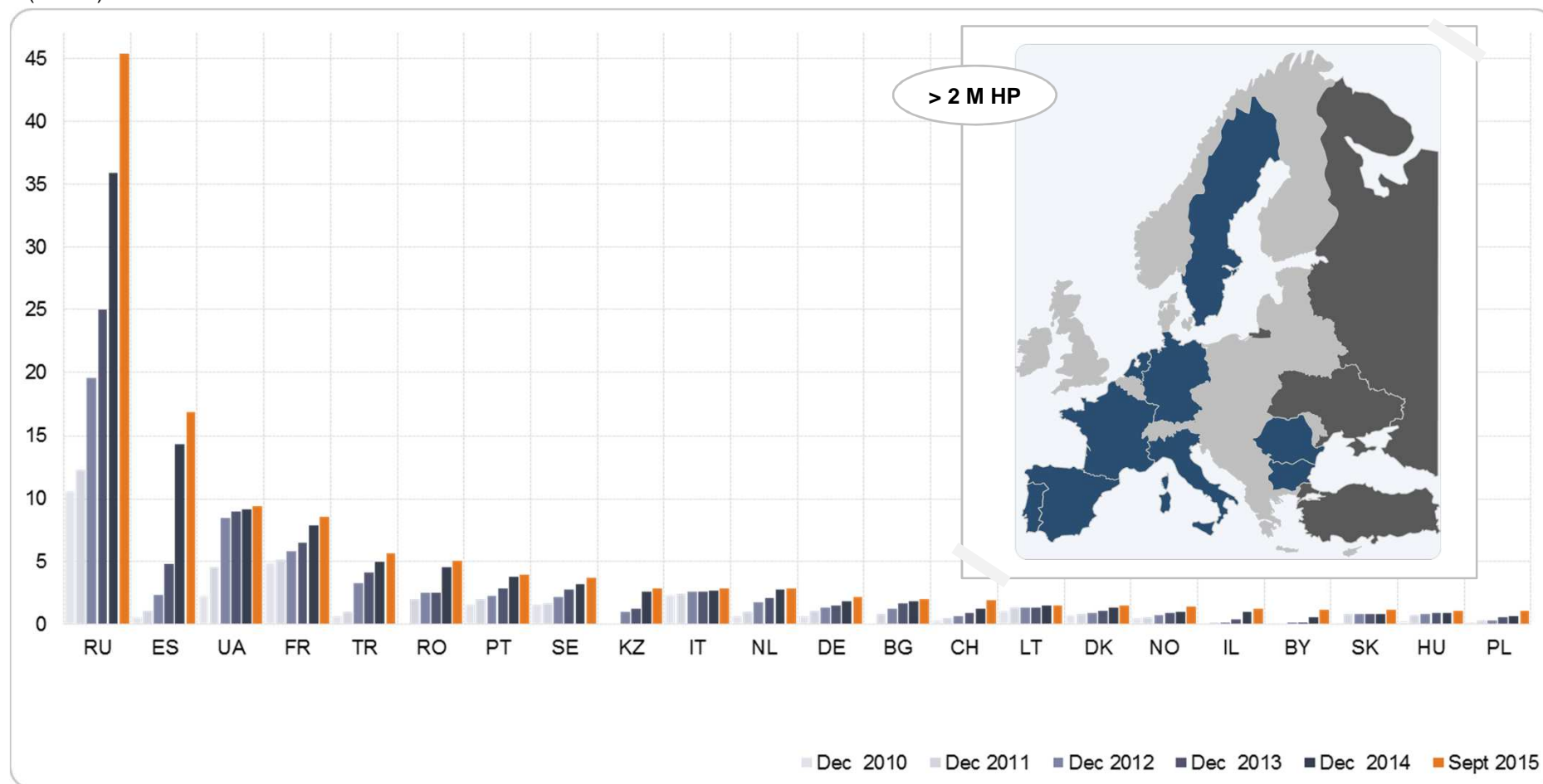
Key Points

General ranking: FTTH/B Homes Passed

> 13 countries with 2 M HP or more in EU39 (9 countries in EU28, in blue on the map)

> Most significant growth rates do not necessarily concern the largest market but this confirms that, even in countries where FTTH/B is not the leading NGA solution, the interest is growing (e.g. in the UK: +51%!)

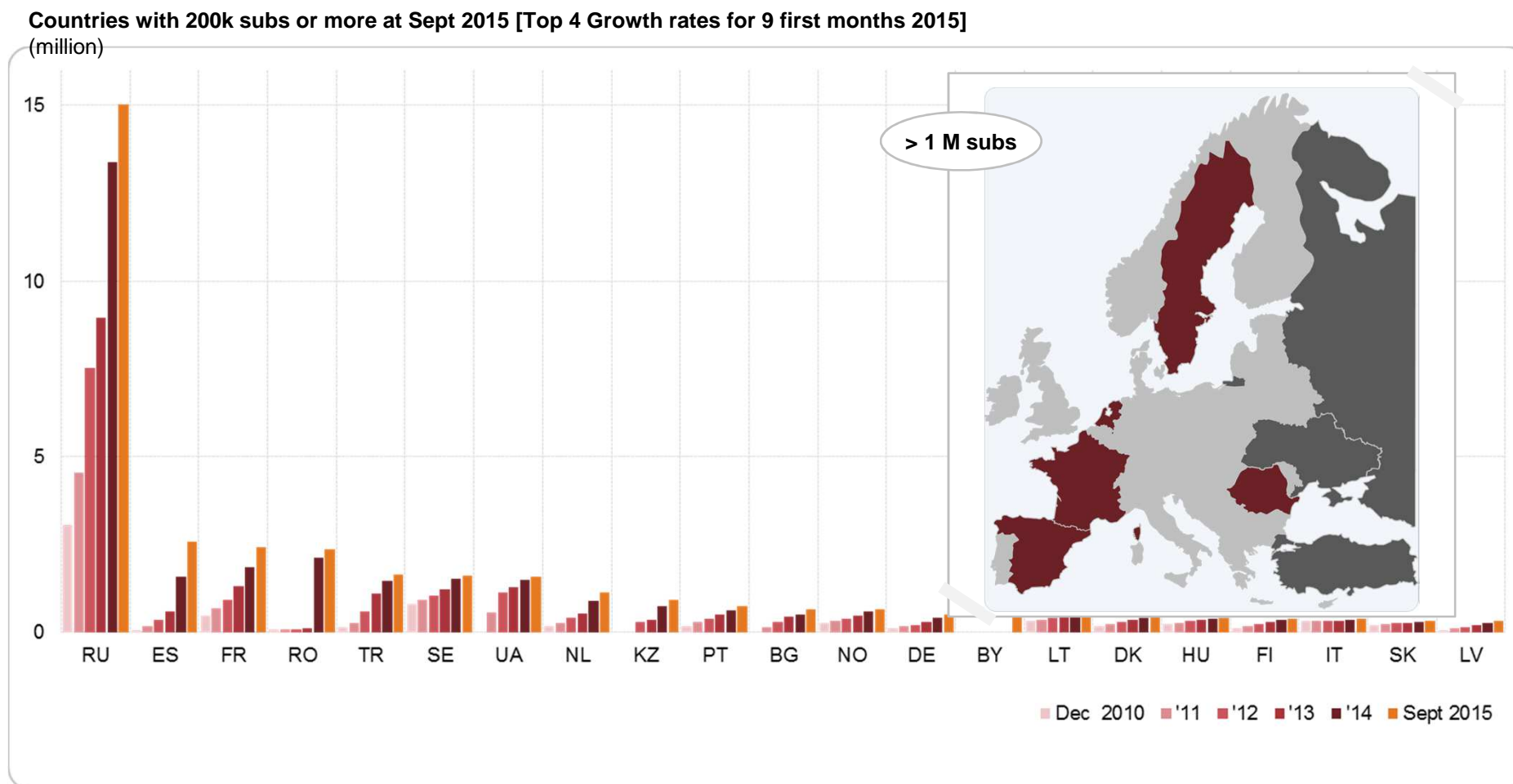
Countries with 1M HP or more at Sept 2015 [Top 4 Growth rates for 9 first months 2015]
(million)



Source: IDATE for FTTH Council Europe

General ranking: FTTH/B Homes Subscribers

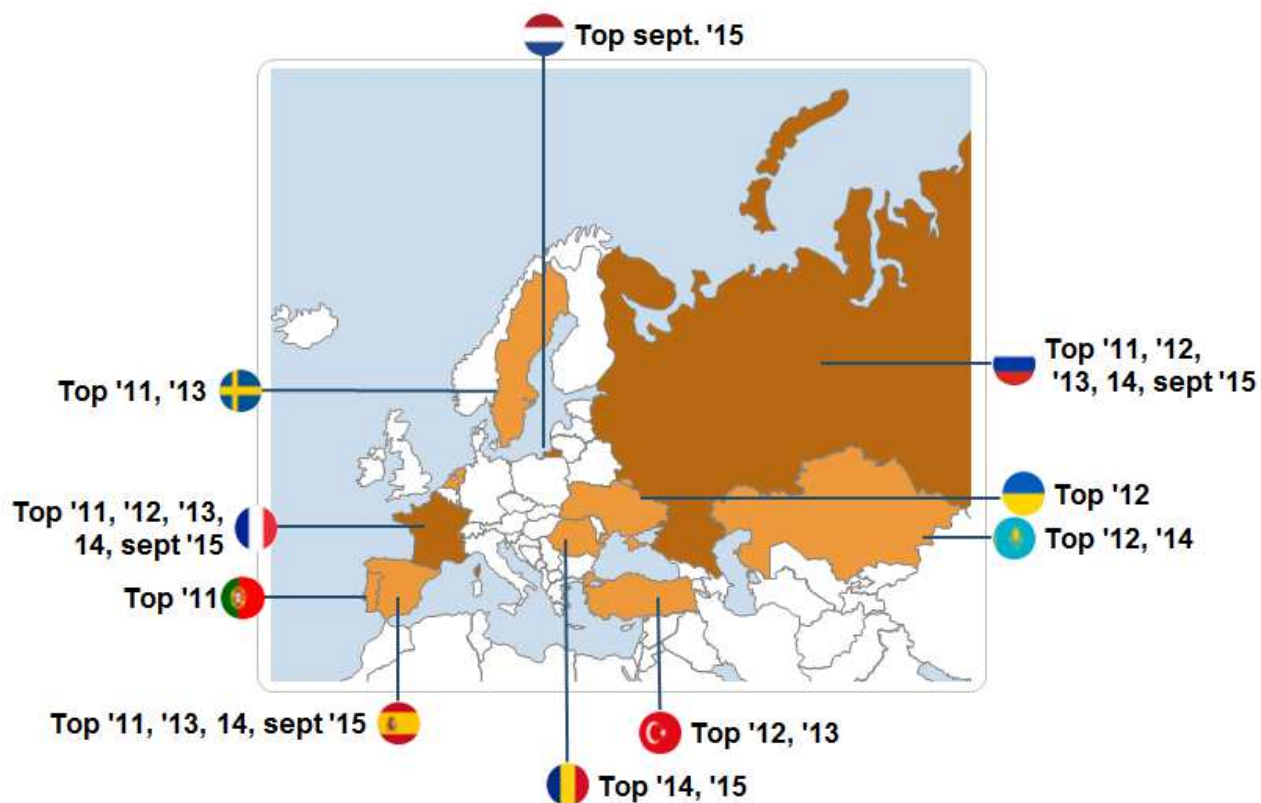
- > 8 countries with 1 M subscribers or more in EU39 (5 countries in EU28, in red on the map))
- > Strong growth in Spain, France and The Netherlands
- > Dynamism to highlight in Poland and Croatia



Source: IDATE for FTTH Council Europe

The dynamism in terms of new subscribers

- > 15% of FTTH/B subscribers in EU39 are “new subscribers” (having subscribed between January and September 2015)
- > This rate reaches 18% in EU28
- > Those figures are of course related to the demography (Russia), but also to the dynamism of players in the countries:
 - In France, 24% of the subscribers at September 2015 are new subscribers
 - This ratio reaches 39% in Spain and 33% in Poland !!

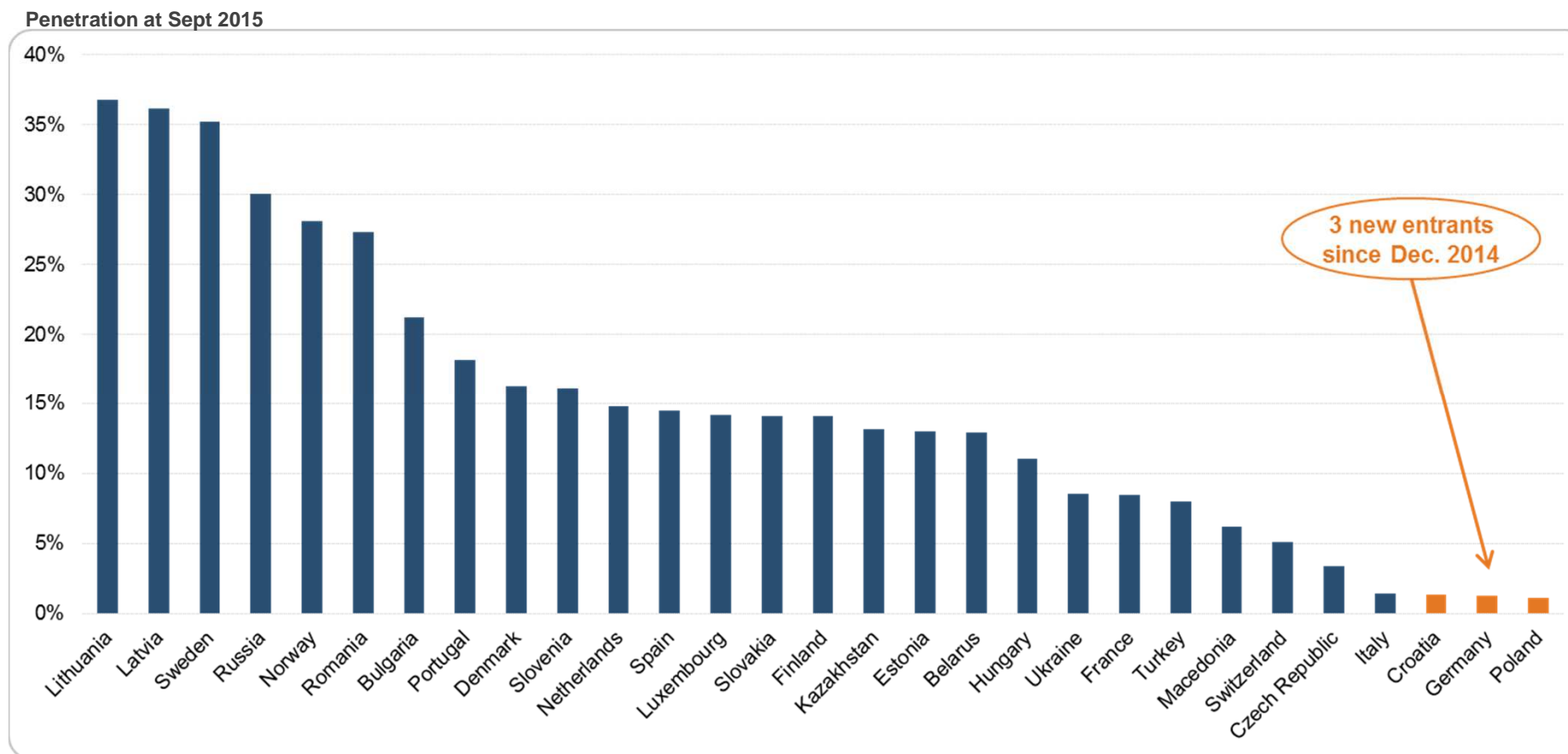


Source: IDATE for FTTH Council Europe

European ranking

European ranking

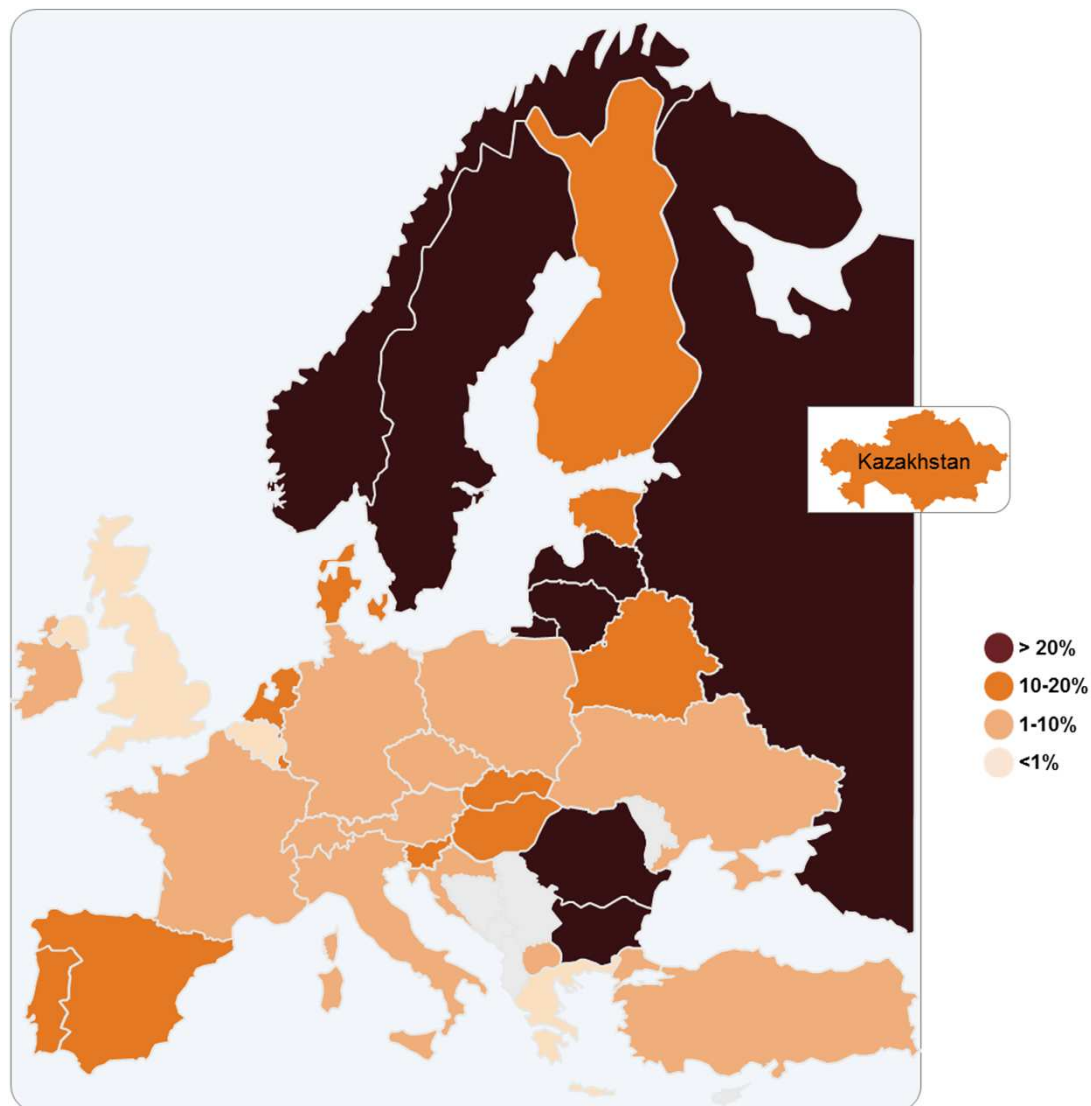
> The European Ranking includes countries of more than 200k HH where the part of FTTH/B subs in the total number of HH is at least 1%



Source: IDATE for FTTH Council Europe

European ranking

Penetration at Sept 2015



Source: IDATE for FTTH Council Europe

Key conclusions

Key conclusions

- **More and more countries in the ranking... a positive sign even if the bottom line is 1%.**
- **Historical trends confirms the move towards FTTH/B: the growth is there, even if not always sustained; 2014 seems to be a year of real start for FTTH/B!**
- **End users are more and more aware about FTTH/B, but the switch to FTTH/B connection is not systematic yet: there is still a large room for communication by operators.**
- **Governments and local authorities are entering the game**
 - DAE's main requirements are respected in all EU28 countries
 - Local authorities are more dynamic in Scandinavian countries and in France: they should impulse a new dynamic in countries where FTTH/B is lagging far behind other architectures
- **Highest take up rates in Northern and Eastern countries: still strong competition from other architectures elsewhere**
 - But Spain and France are still leading countries in terms of new subscribers from one year to another
- **Nearly all players, even if less involved in FTTH/B than other architectures, consider that FTTH is the end game!**



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xls	Dataset	World FTTx Market - data & forecasts up to 2020	July/Dec.	n.r.		6 000	M16505DB
ppt	Report	State of FTTx worldwide	July/Dec.	30-50		3 000	M16505SF
doc + ppt	Report	Public Policies for ultra-fast broadband deployment	April	40-80		3 000	M16408MR
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Thank you !

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