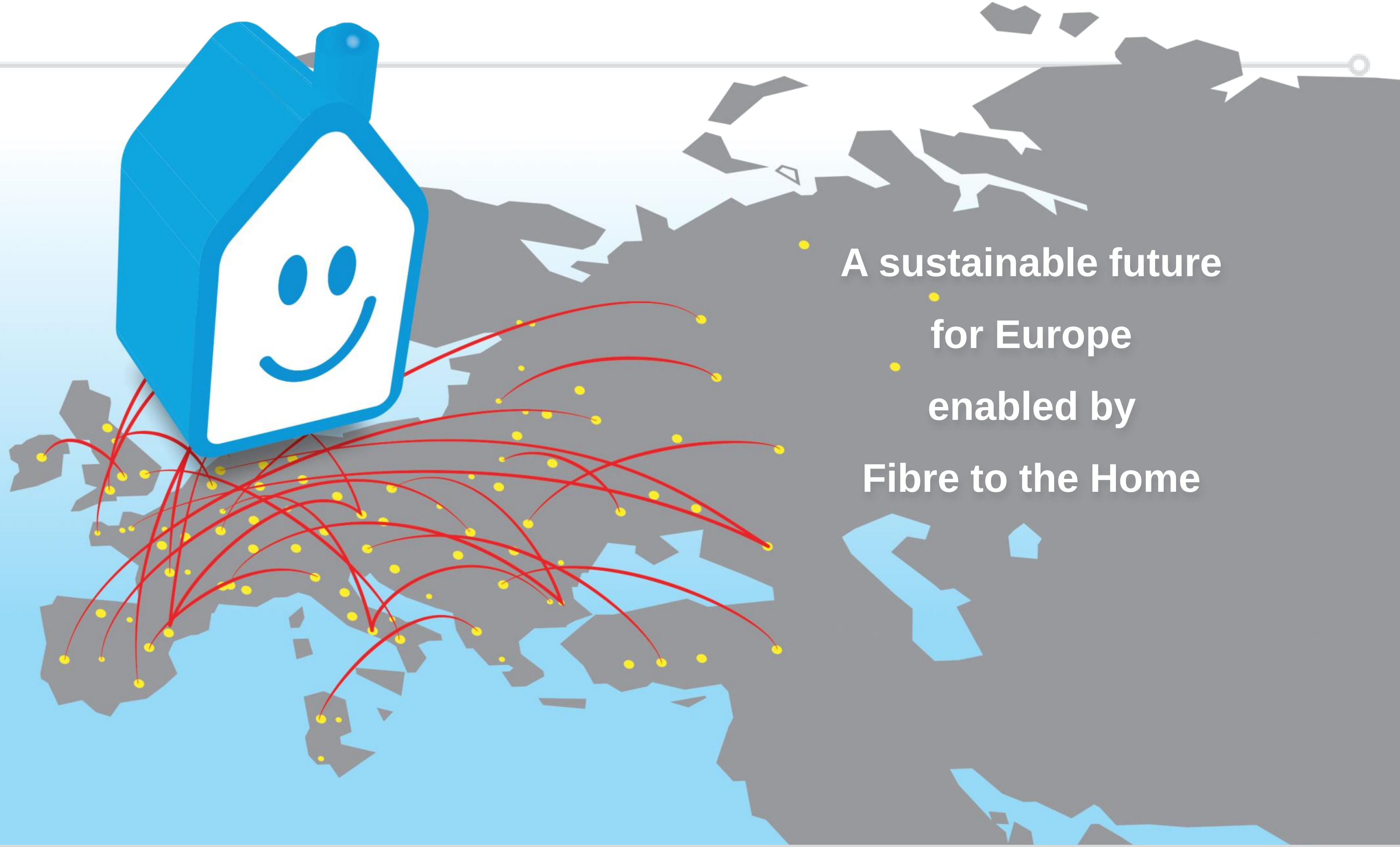
#ftthwebinar

„FTTH Market in Europe – Status and Analysis in 2015“



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Webinar

- 20-25 minutes presentation
- 15-20 minutes Q&A

- Please write your questions in the questions box of the webinar system
- Relevant questions that are not answered during the webinar will be answered by email

- The slides will be available for download after the webinar
- The webinar is recorded and can be viewed as video-stream afterwards. The video will be available on the website of the FTTH Council Europe within one week
- Slides and information about the availability will be sent to registered attendees by email

FTTH Council Europe

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#ftthwebinar

FTTH Market in Europe – Status and Analysis in 2015

Moderator:

Jan Schindler

Chair Market Intelligence Committee

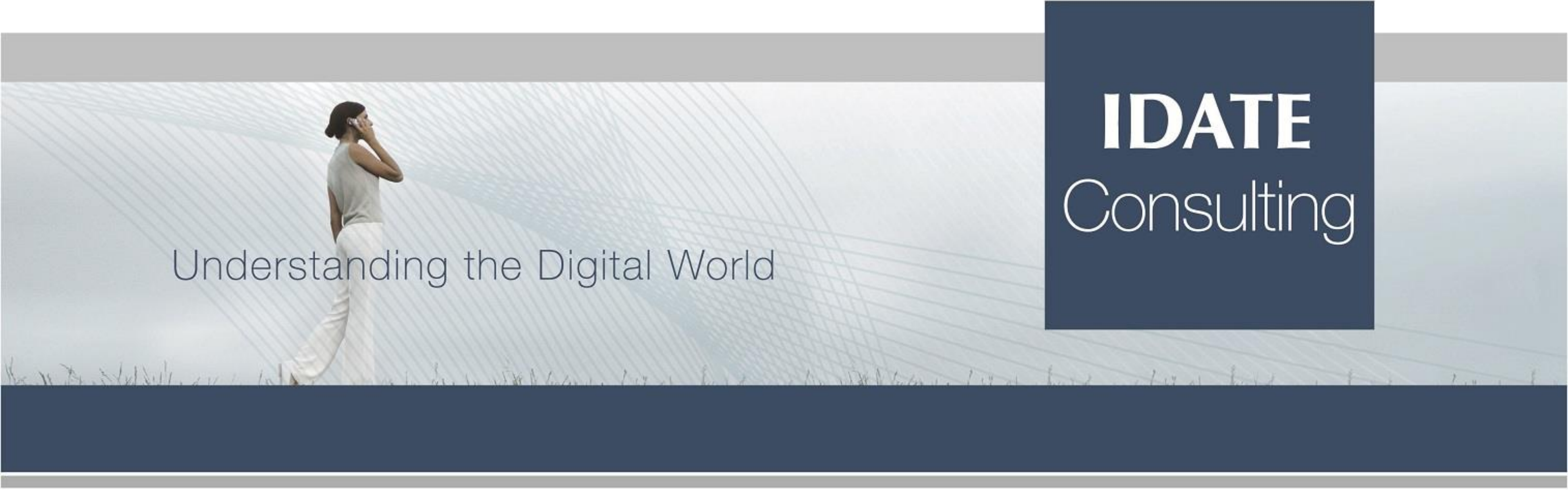
FTTH Council Europe

Presenter:

Roland Montagne

Principal Analyst, Director Market Development

IDATE



FTTH/B Panorama

Europe (EU39) at September 2015

FTTH Council Europe - Webinar – June, 30th, 2016

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by IDATE

Agenda

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

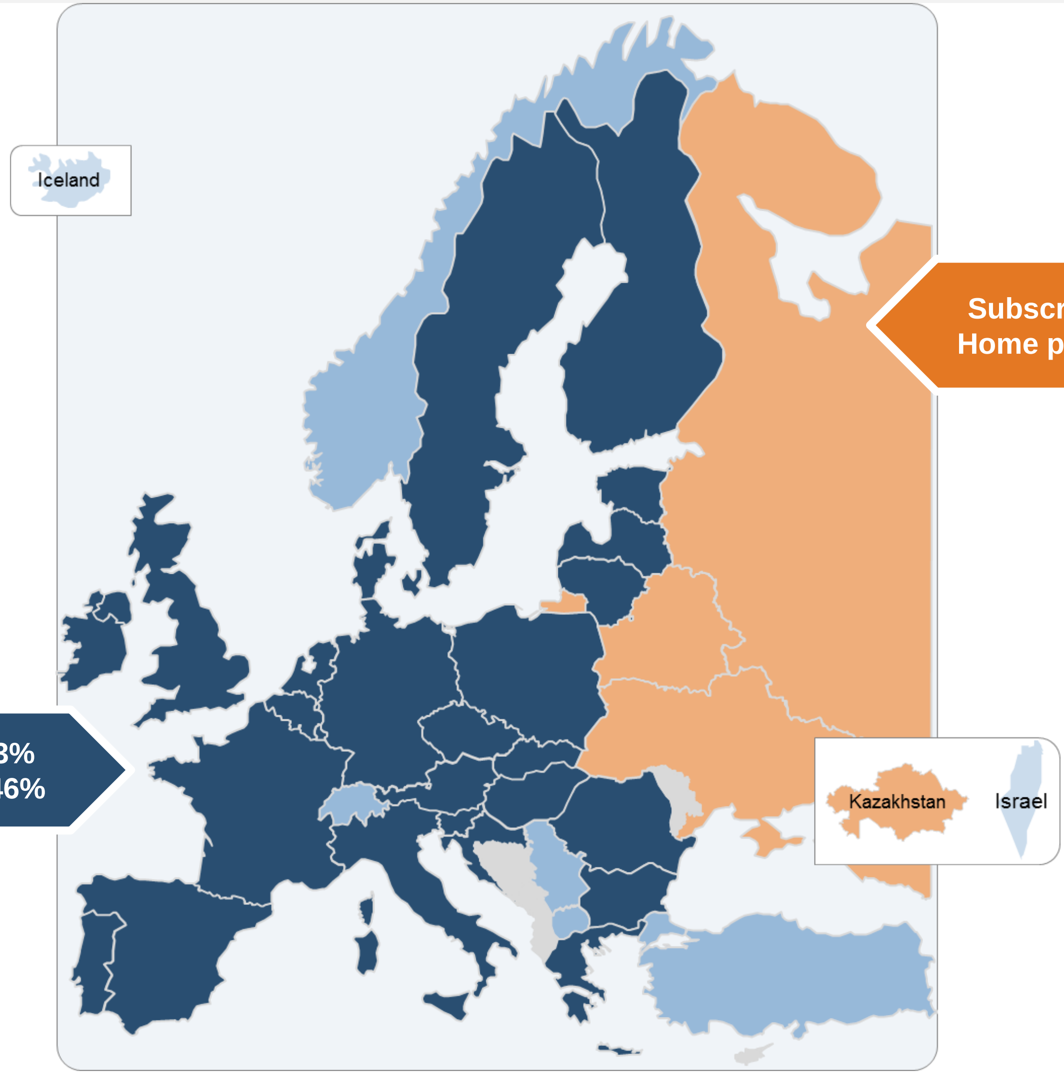
- Both quantitative and qualitative data, presenting the status in the country and the strategic approach of involved players

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



CIS

Subscribers = 50%
Home passed = 46%

EU 28

Subscribers = 43%
Home passed = 46%

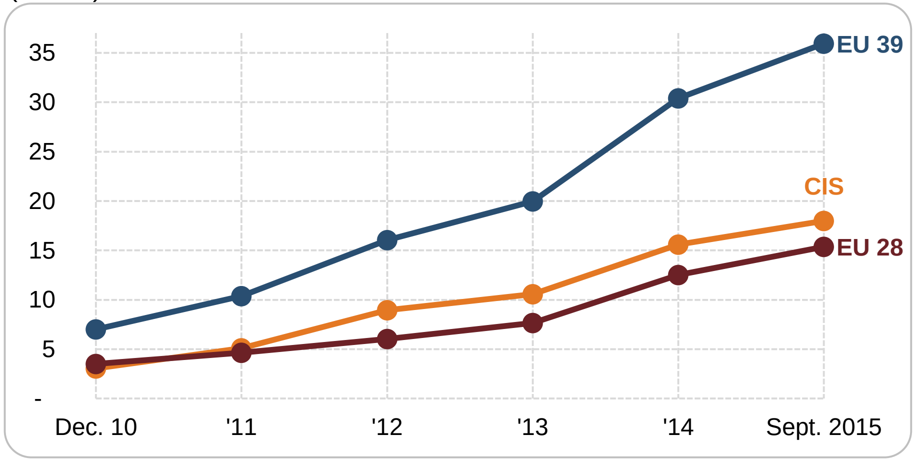
Historical data and growing trends

> Interesting dynamism of the European Union since 2013

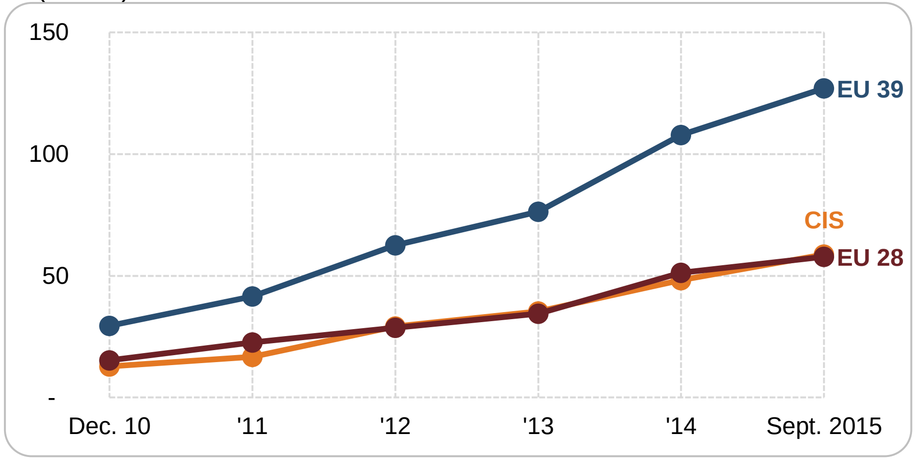
> CIS countries : higher growth rates for subs than for HP between January and September 2015

> 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)



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



Source: IDATE for FTTH Council Europe

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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

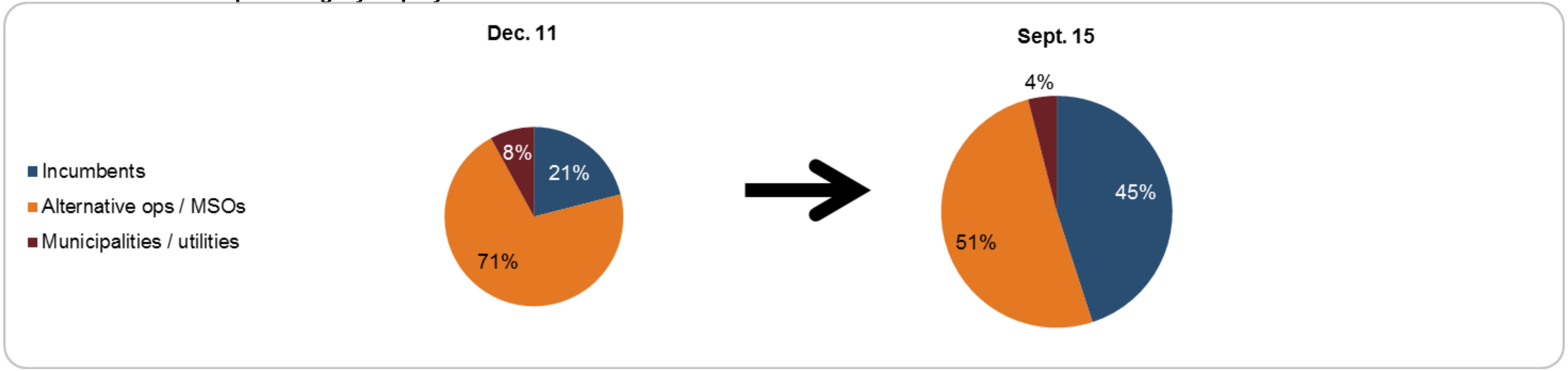
> Incumbents now represent 45% of the total number of Homes Passed

- 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

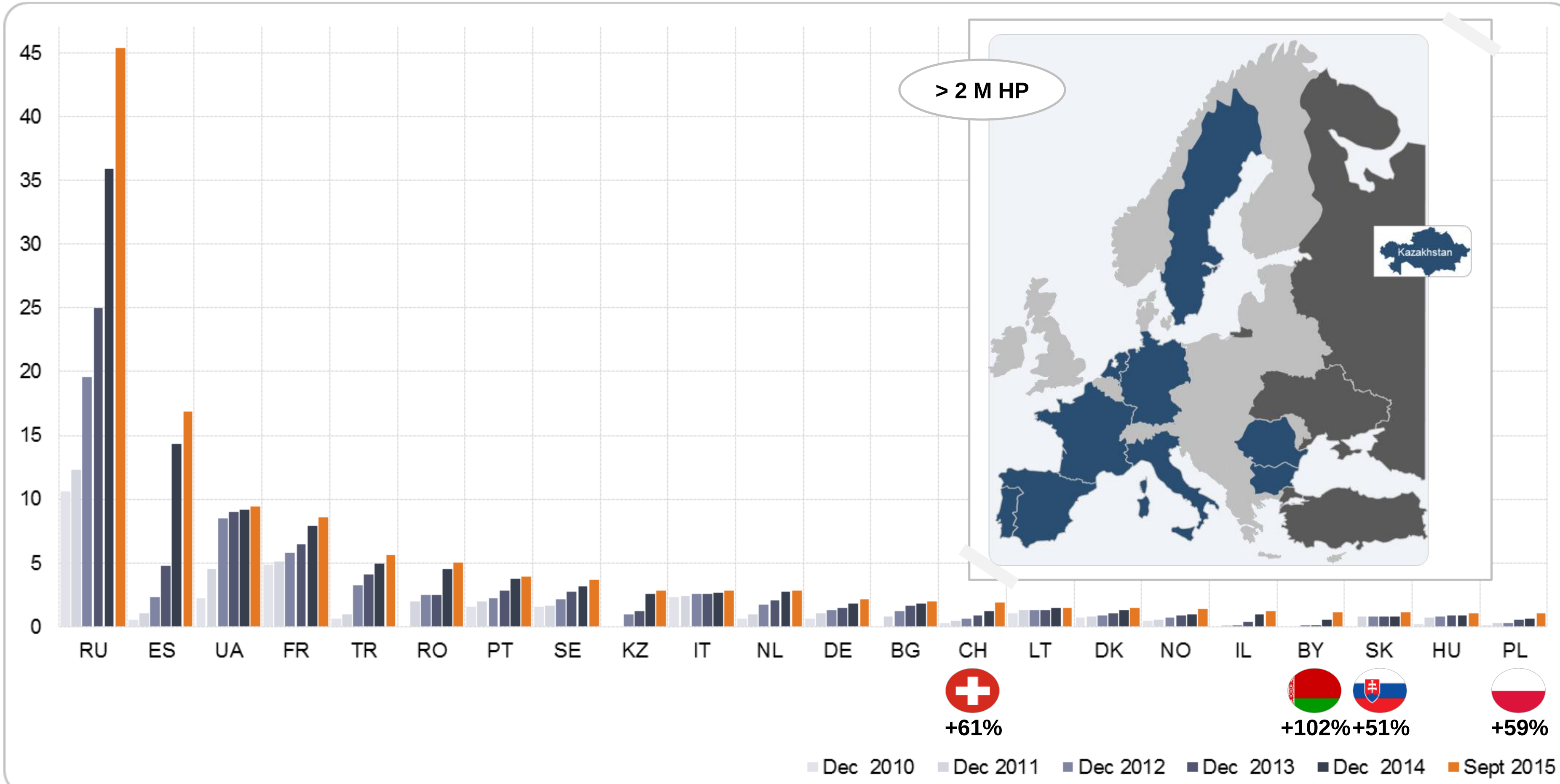
General ranking HP & subscribers
Highest growths
Key Points

General ranking: FTTH/B Homes Passed

> 13 countries with 2 M HP or more in EU39 (10 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

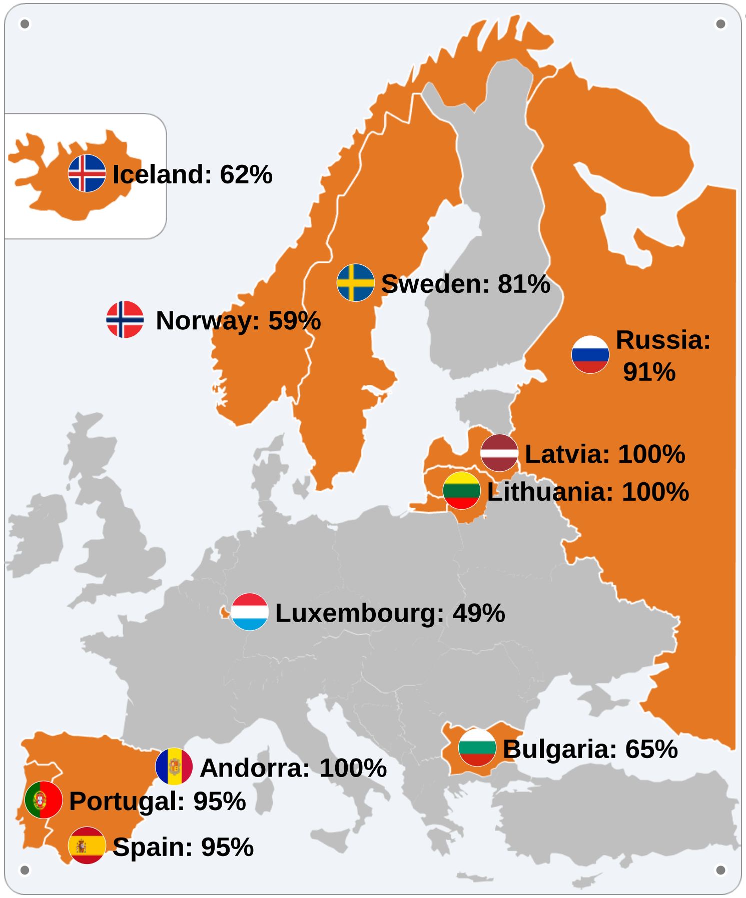
General ranking : FTTH/B coverage

Average FTTH/B coverage (*): **EU39 → 39%**

EU28 → 27%

(*) Number of HP/total number of Households

Top 10 countries in coverage at September 2015



Source: IDATE for FTTH Council Europe

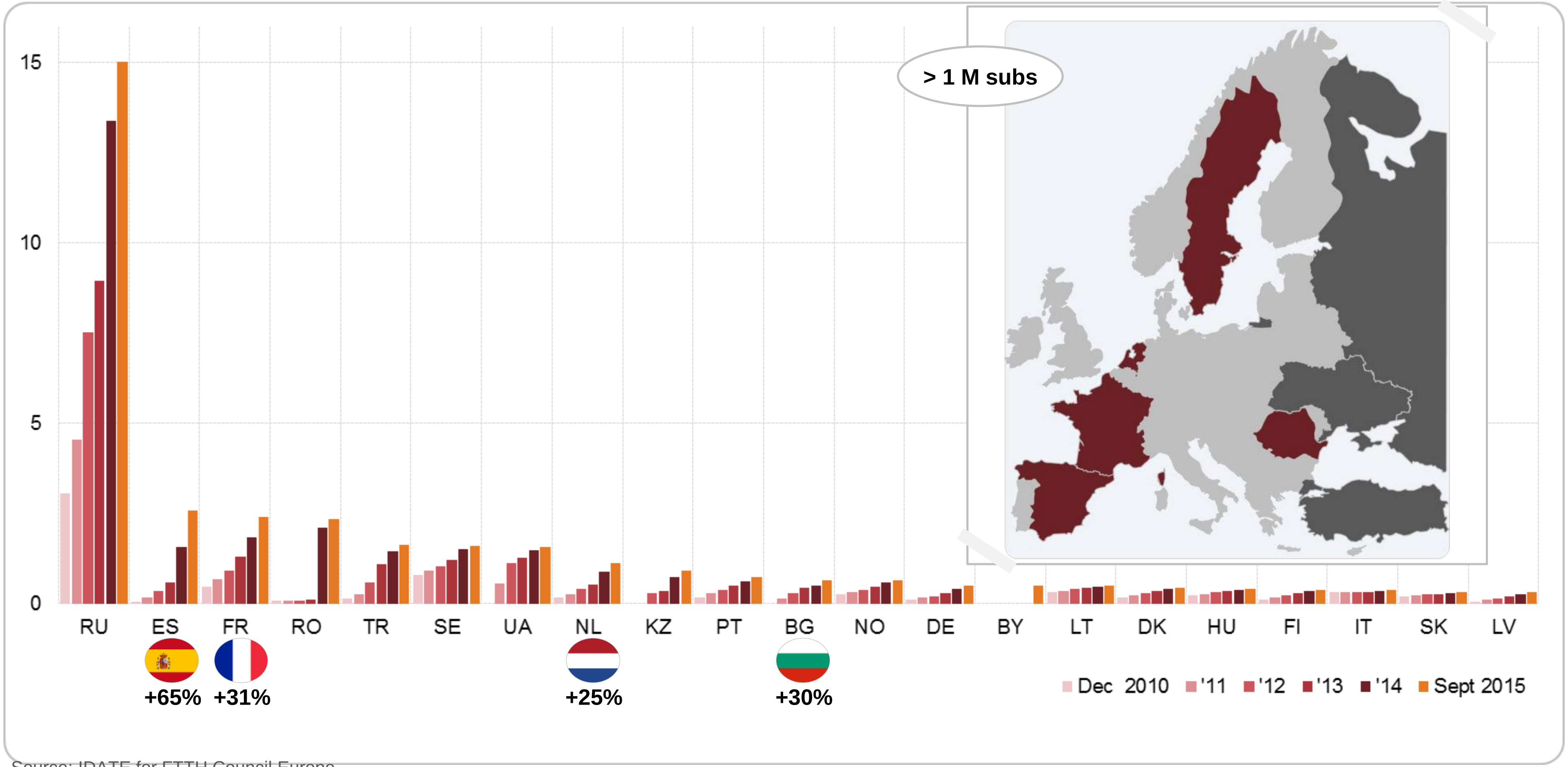
General ranking: FTTH/B Homes Subscribers

> 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

Countries with 200k subs or more at Sept 2015 [Top 4 Growth rates for 9 first months 2015]
(million)



Source: IDATE for FTTH Council Europe

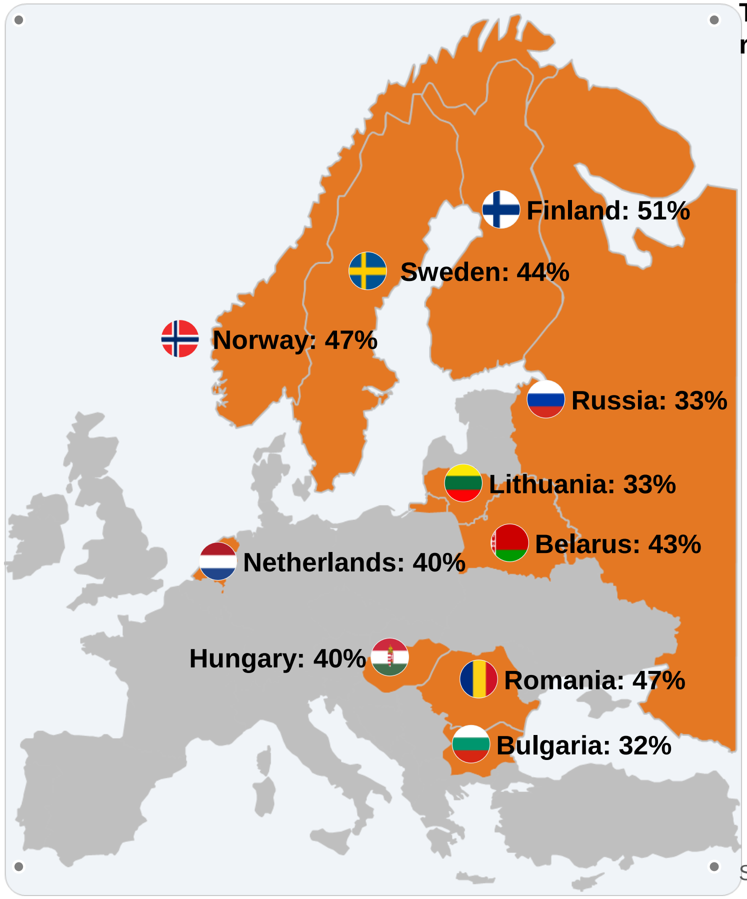
General ranking : FTTH/B take-up rate

Average FTTH/B take up rate (*): **EU39 → ~ 28%**

EU28 → ~ 27%

(*) Take up rate = number of subscribers / number of Homes Passed

Top 10 countries of more than 200 K subs in take-up rate at September 2015



Source: IDATE for FTTH Council Europe

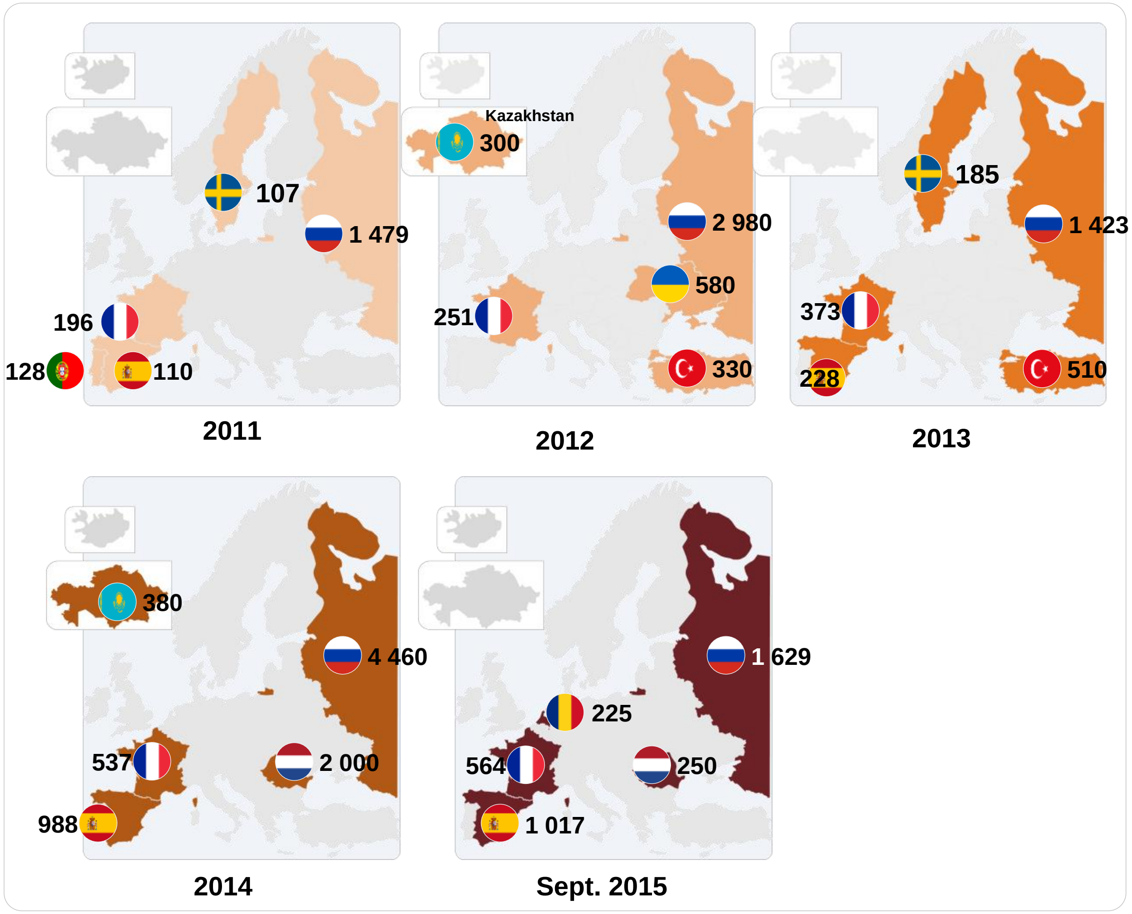
The dynamism in terms of new subscribers

> 15% of FTTH/B subscribers in EU39 are "new subscribers" (having subscribed between January and September 2015)

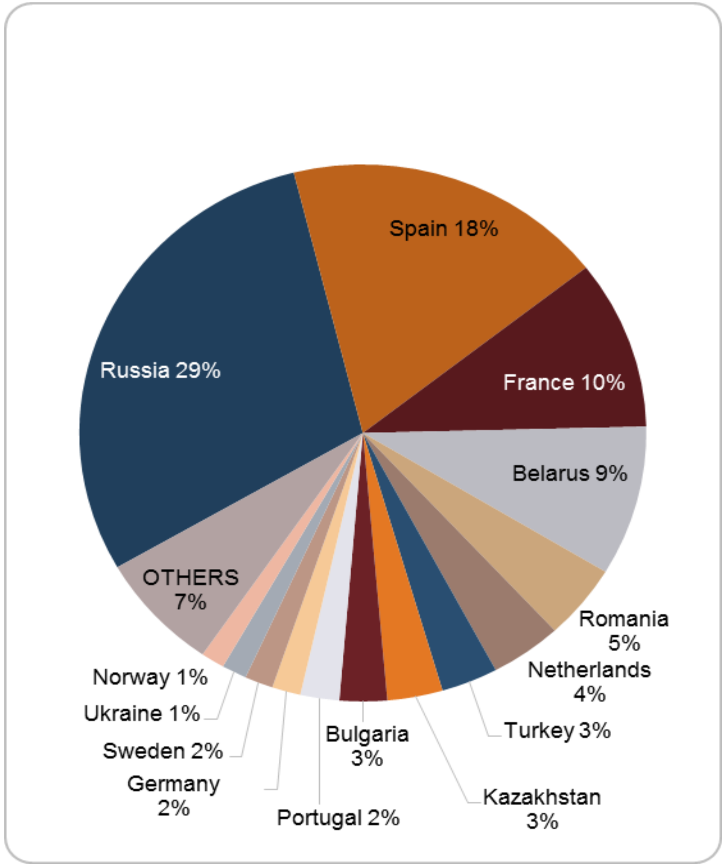
> This rate reaches 18% in EU28

> 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 !!

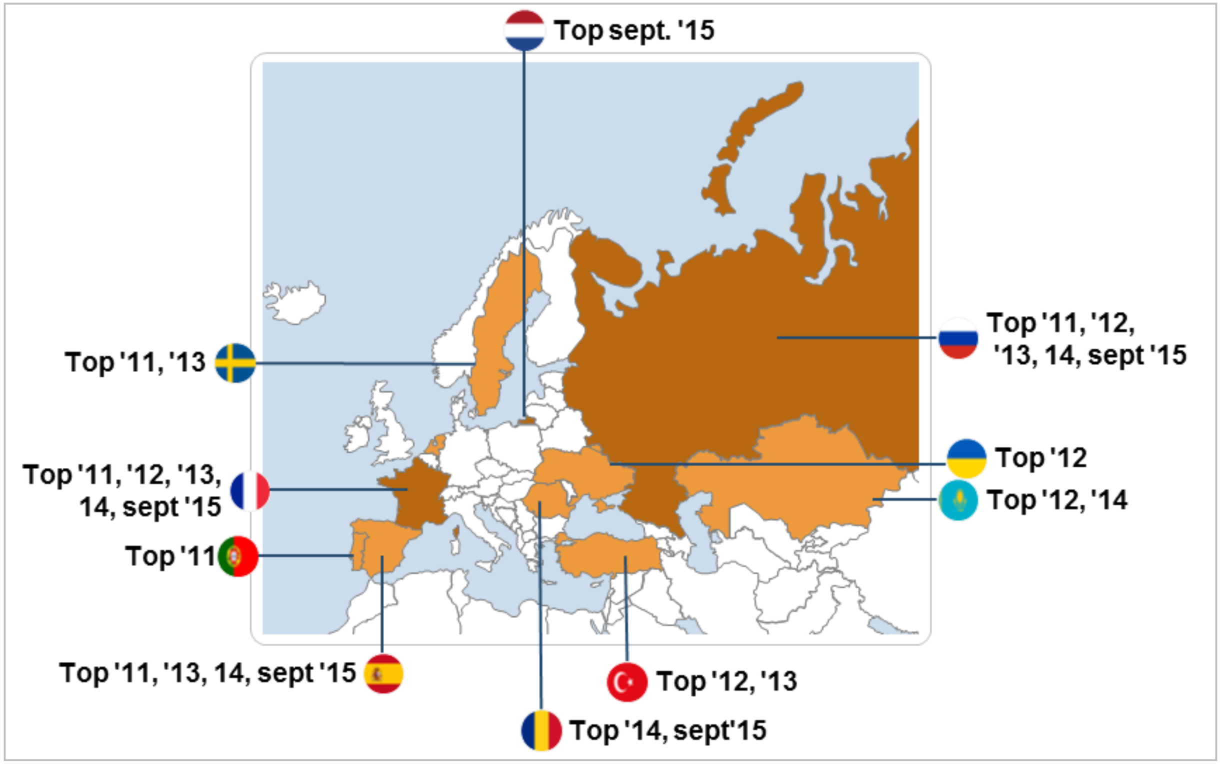


% of new subscribers per country between Dec. 14 and Sept. 15



Source: IDATE for FTTH Council Europe

The dynamism in terms of new subscribers



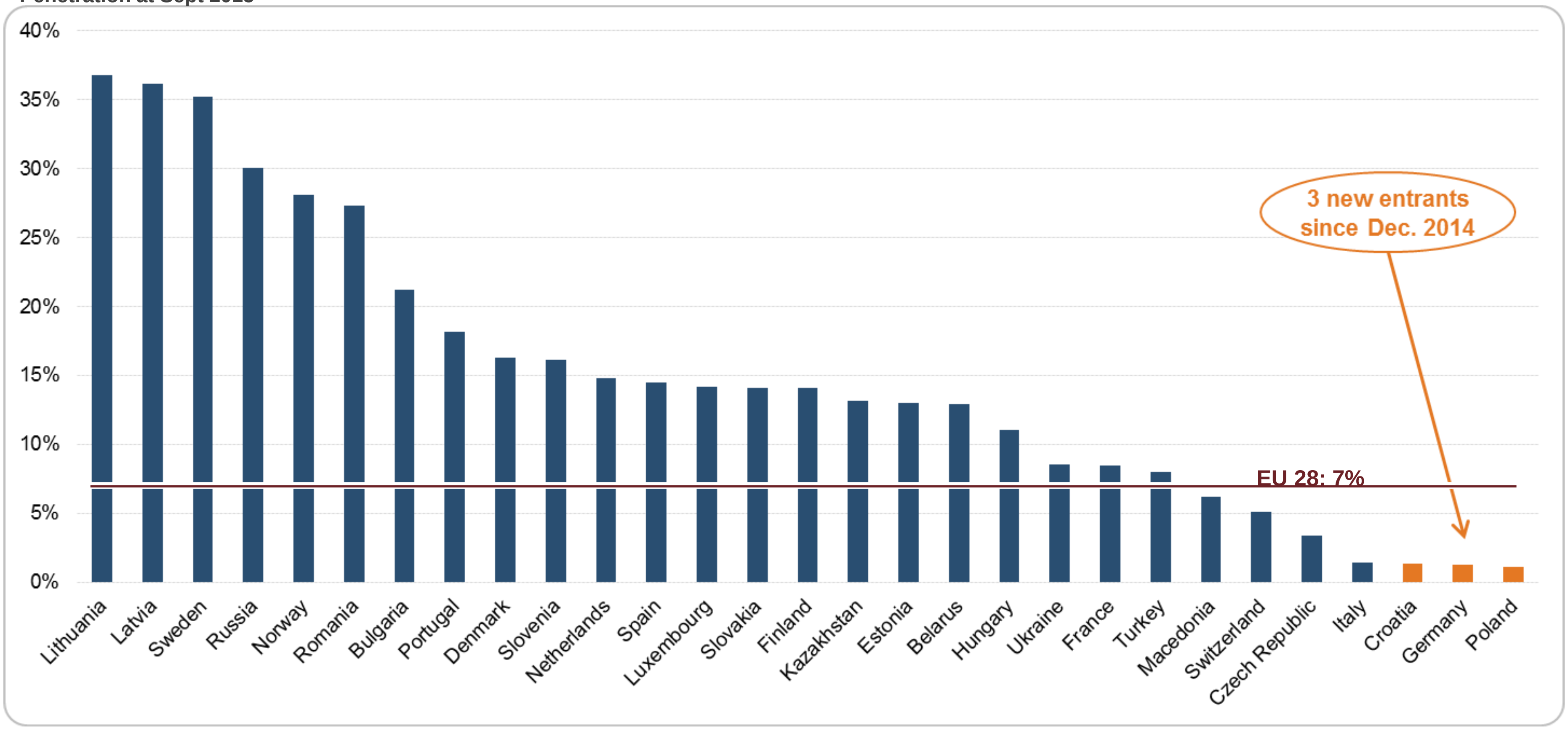
Source: IDATE for FTTH Council Europe

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%

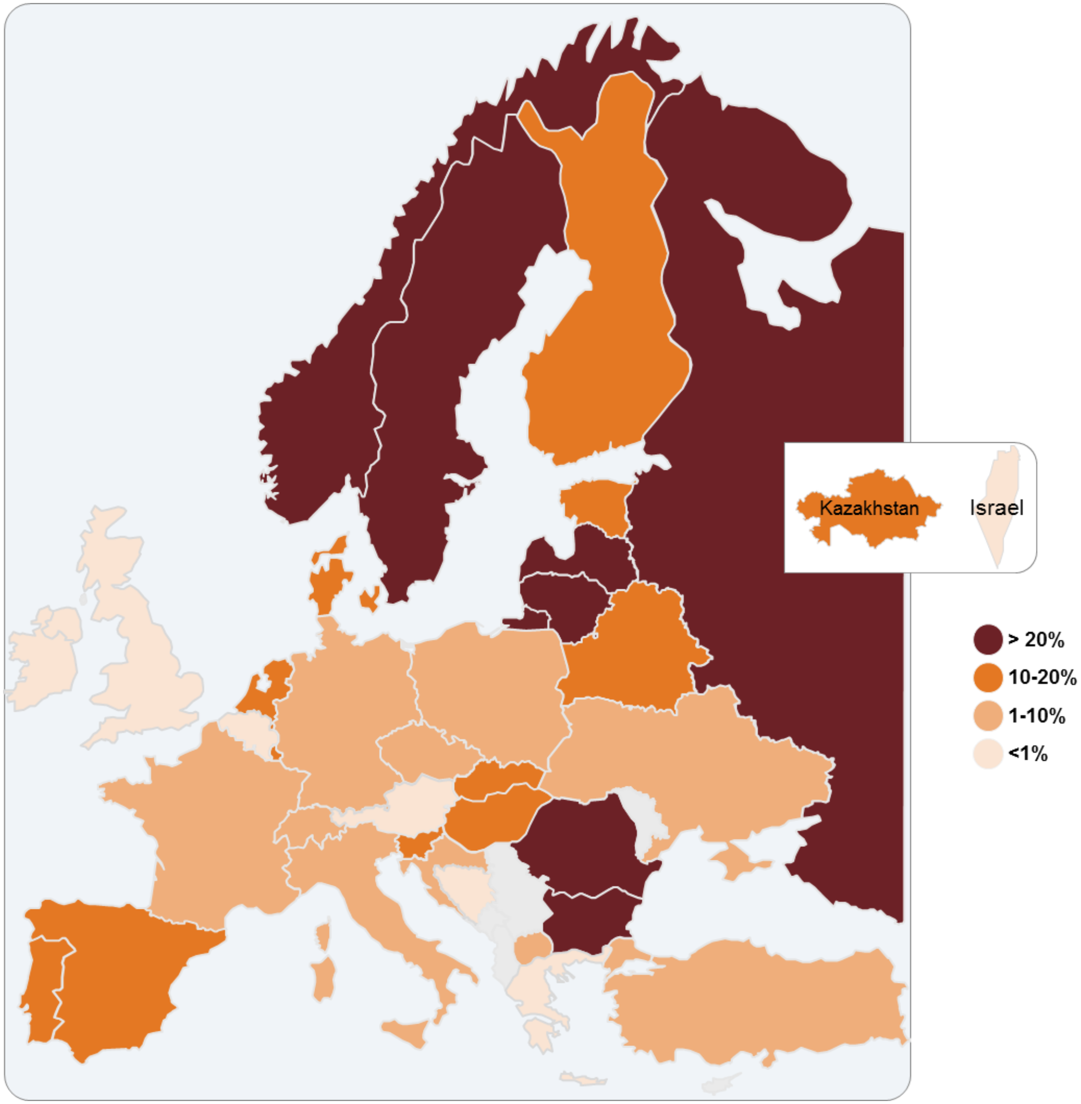
Penetration at Sept 2015



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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		Wireline 2016			**10 000**		
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	M16505SR
doc + ppt	Report	***Public Policies for ultra-fast broadband deployment***	April	*40-80*		3 000	M16408MR
doc + ppt	Report	***First lessons from new UFB technologies*** *(G.Fast/Docsis3.1)*	May	*20-40*		2 000	M16506MR
doc + ppt	Report	***Digital Agenda Europe: focus on fixed broadband***	July	*20-40*		2 000	M16507MR
doc + ppt	Report	***Connected Cities***	Sept.	*20-40*		2 000	M16505IN1
doc + ppt	Report	***FTTx Vendors*** *(indicative title)*	Nov.	*20-40*		1 000	M16505IN2
		Wireline 2015 & prior publications			**10 000**		
doc + ppt	Report	**National Broadband Plan:** announcements & realities	25/08/2014	*29*		1 000	M14545IN3
doc + ppt	Report	**Prospects for fixed access revenues**	27/11/2014	*42*		3 000	M14546MR
xls	Dataset	**World FTTx Market** - data & forecasts up to 2019	July/Dec.	*n.r.*		6 000	M15505DB
ppt	Report	**State of FTTx worldwide**	July/Dec.	*44*		3 000	M15505SR
doc + ppt	Report	**Gigabit Race**	15/09/2015	*40*		1 000	M15505IN1
doc + ppt	Report	**FTTx Vendors**	21/09/2015	*27*		1 000	M15505IN2
doc + ppt	Report	**FTTx Services & Pricing**	09/10/2015	*30*		1 000	M15505IN3
doc + ppt	Report	**Cable dynamics**	30/11/2015	*57*		3 000	M15507MR
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Thank you !

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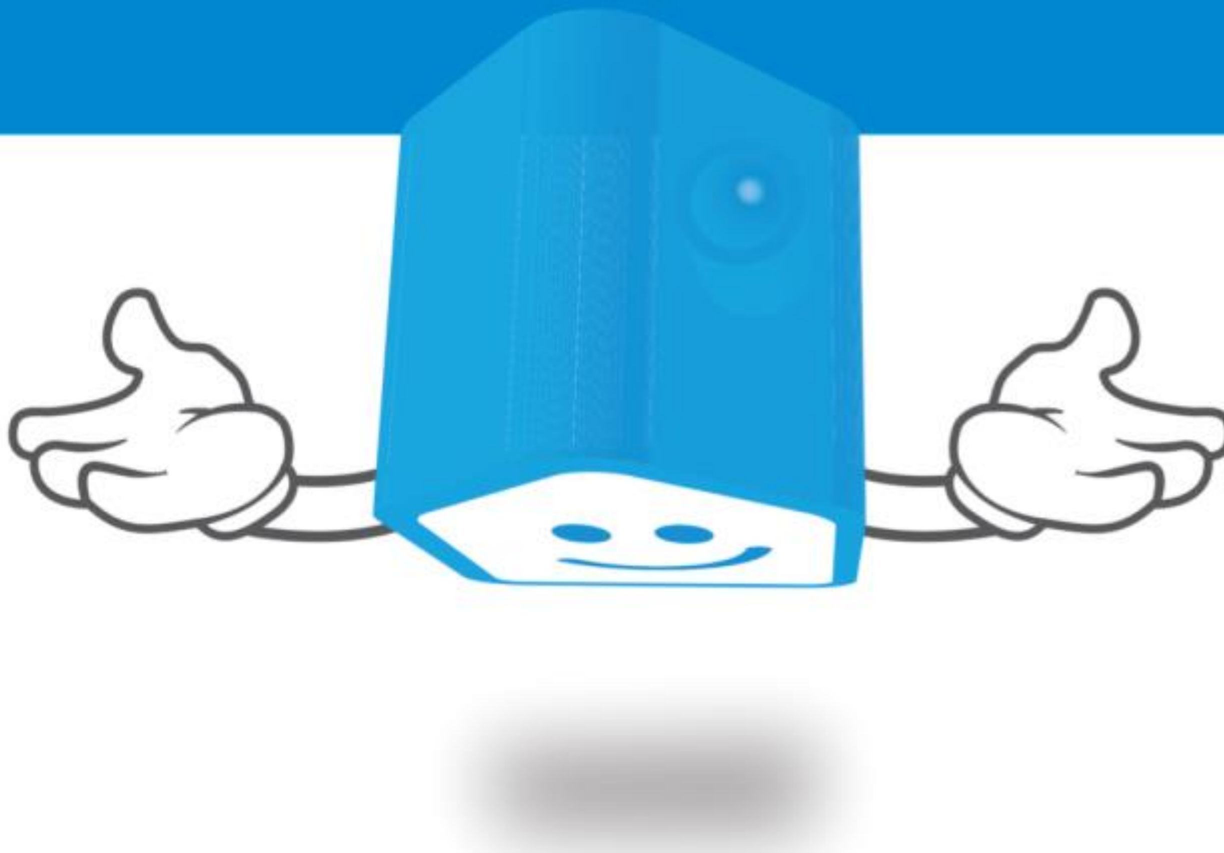
QUESTIONS?



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