

Creating a brighter future

European FTTH Panorama – updated figures at September 2016

European FTTH Panorama – September 2016

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FTTH Council Europe



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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



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FTTH/B Panorama

Europe (EU39) at September 2016

Webinar – FTTH Council Europe

April 6th, 2017

FTTH/B Panorama - Europe (EU39) at September 2016

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FTTH/B Panorama

Study background

Study background

> Mission on behalf of the FTTH Council Europe – 15th 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



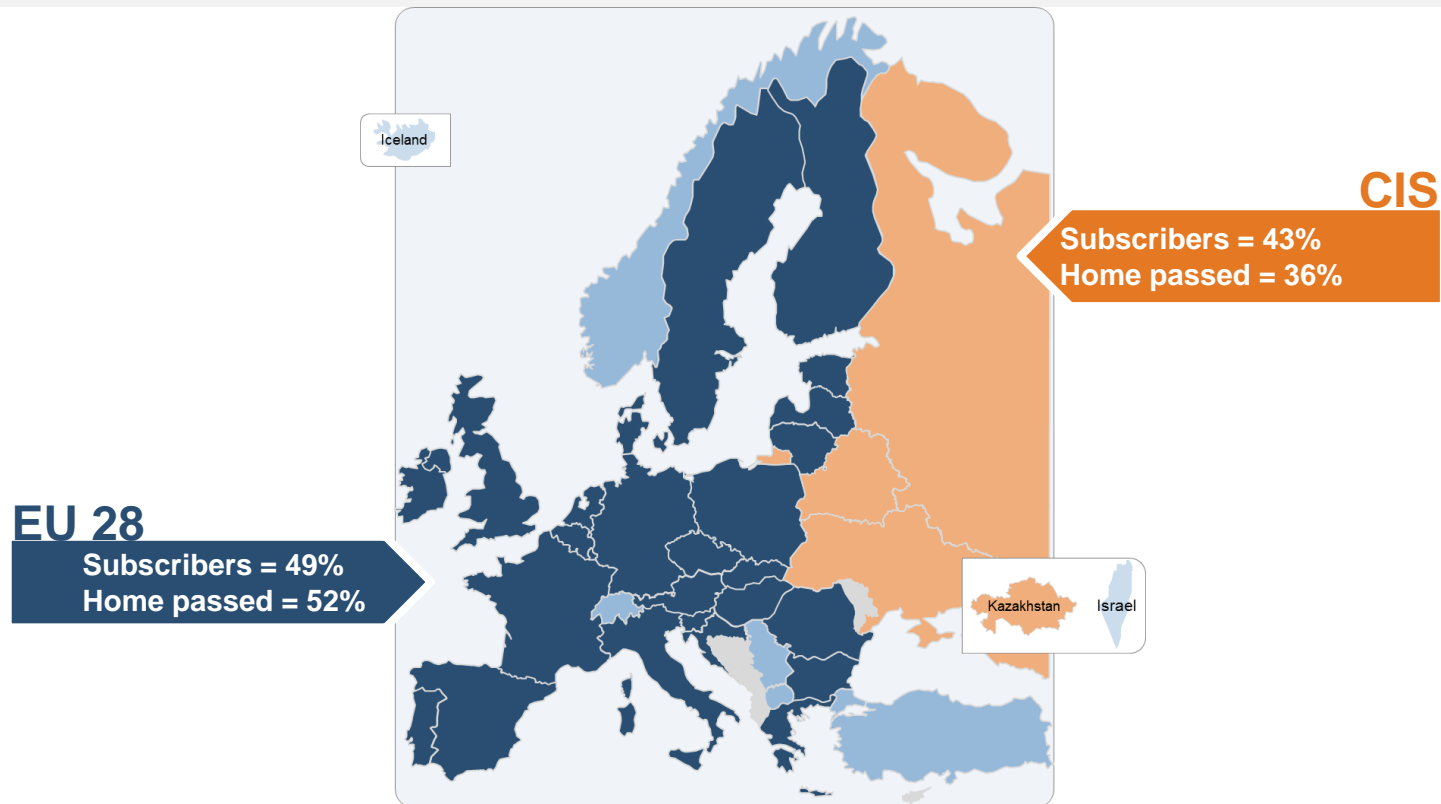
FTTH/B Panorama

General overview and main trends

- > Figures at September 2016 and focus in EU28
- > Historical data and growing trends
- > Main categories of players

FTTH/B figures at September 2016

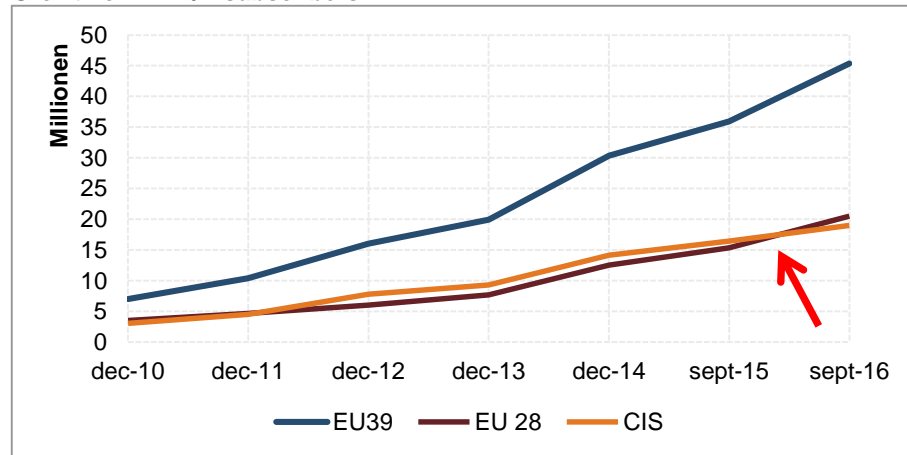
There were more than 44.3 million FTTH/B subscribers and nearly 148 million FTTH/B Homes Passed in EU39 at September 2016



Historical data and growing trends

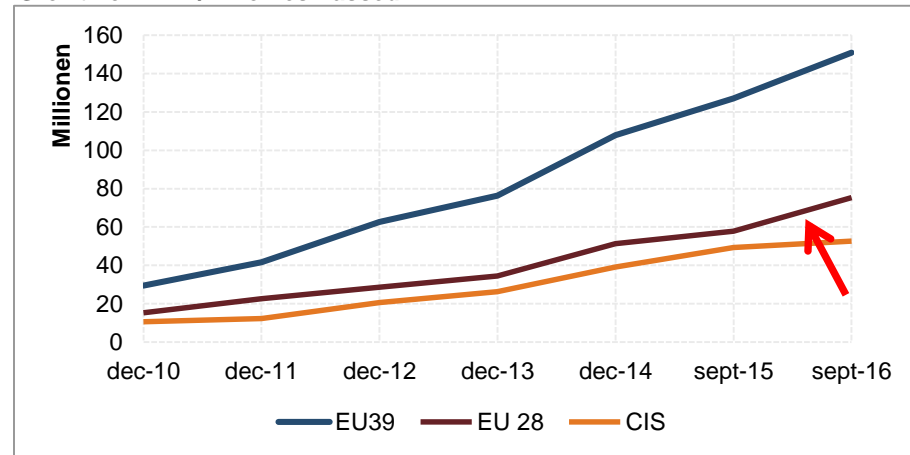
- > Interesting dynamism of the European Union since 2013
- > CIS countries : higher growth rates for subs than for HP between January and September 2016
- > Globally: an increase of the growth rate during the first 9 months of 2016! Especially for EU28

Growth of FTTH/B subscribers



Source: IDATE for FTTH Council Europe

Growth of FTTH/B Homes Passed



Source: IDATE for FTTH Council Europe

Major projects / categories of players

> 400 analyzed FTTH/B projects in EU39 at September 2016:

- 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 (Rural and Suburban)

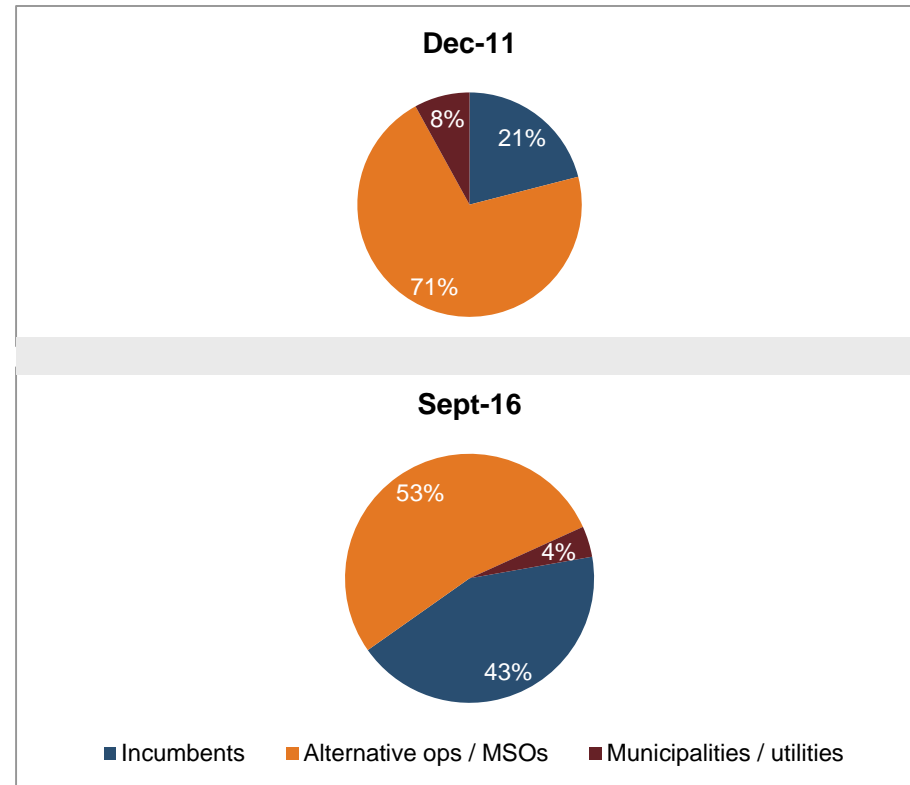
> Incumbents now represent 43% of the total number of Homes Passed

- This ratio was only 21% at end 2011
- **Alternative players**, which promoted FTTH/B in most countries since 2008-2009, now represent 53% of the total number of HP; this ratio is increasing

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

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

Growth of FTTH/B subscribers



Source: IDATE for FTTH Council Europe

FTTH/B Panorama

Leading countries

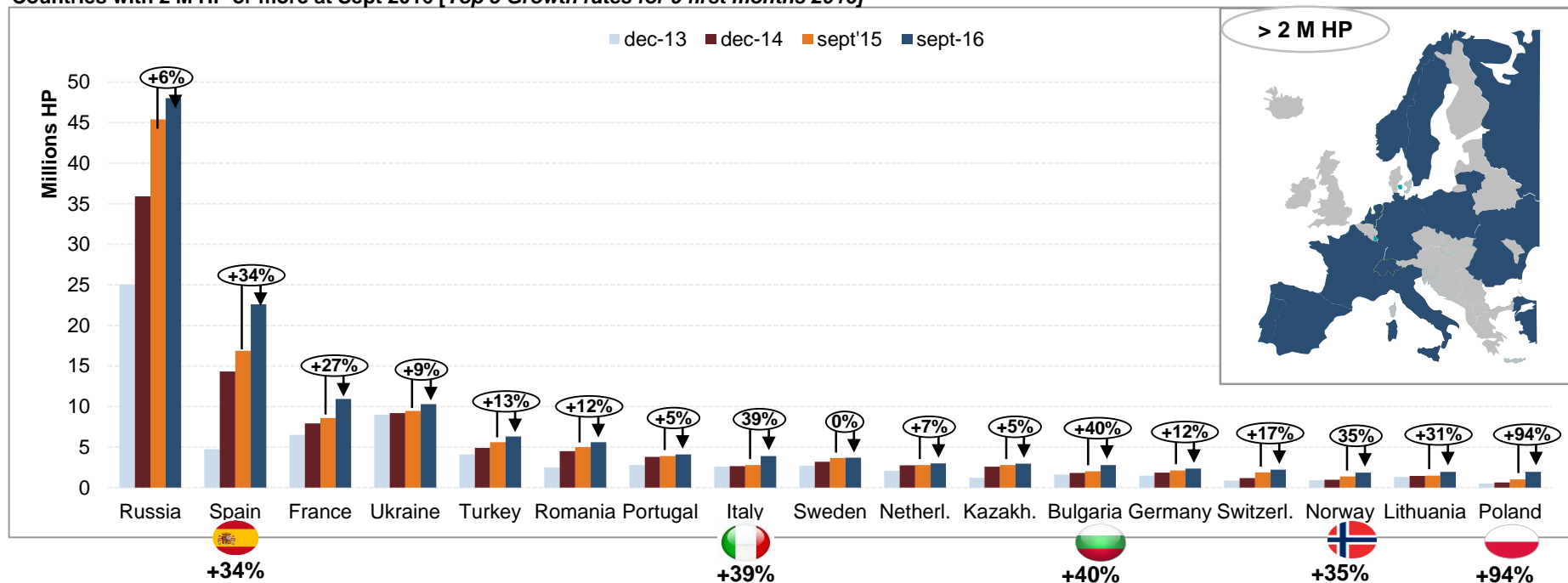
- > General ranking HP & subscribers
- > Highest growths
- > Key Points

General ranking: FTTH/B Homes Passed

> 17 countries with 2 M HP or more in EU39 (10 countries in EU28, in blue on the map)

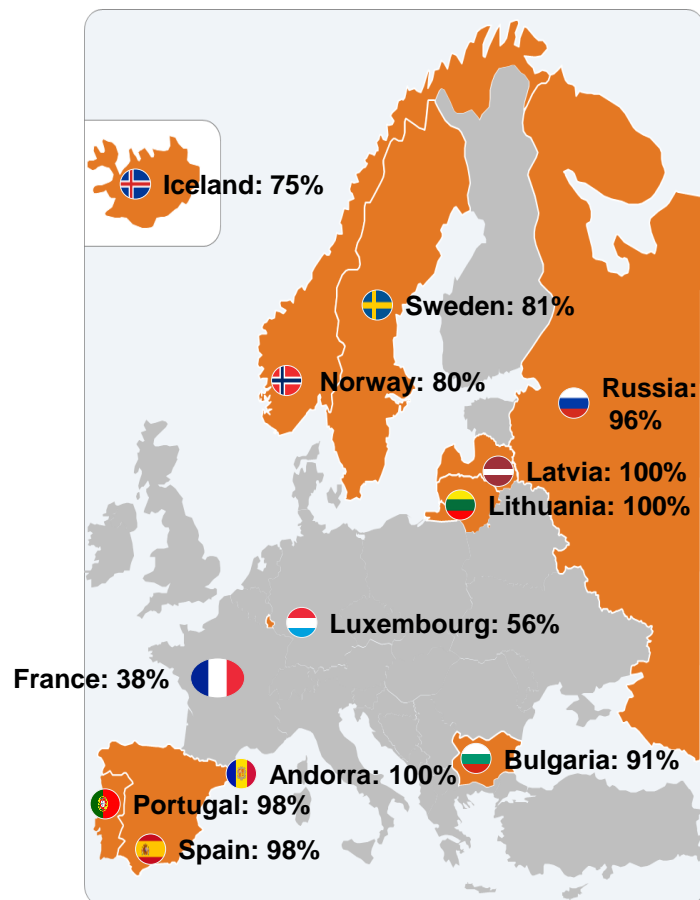
> Most significant growth rates do not necessarily concern the largest market but this confirms that, even in countries where FTTH/B is not the leading NGA solution, the interest is growing (e.g. Bulgaria: +40%)

Countries with 2 M HP or more at Sept 2016 [Top 5 Growth rates for 9 first months 2016]



Source: IDATE for FTTH Council Europe

General ranking : FTTH/B coverage



Top 10 countries in coverage at September 2016

> Average FTTH/B coverage (*):

EU39 → 45%

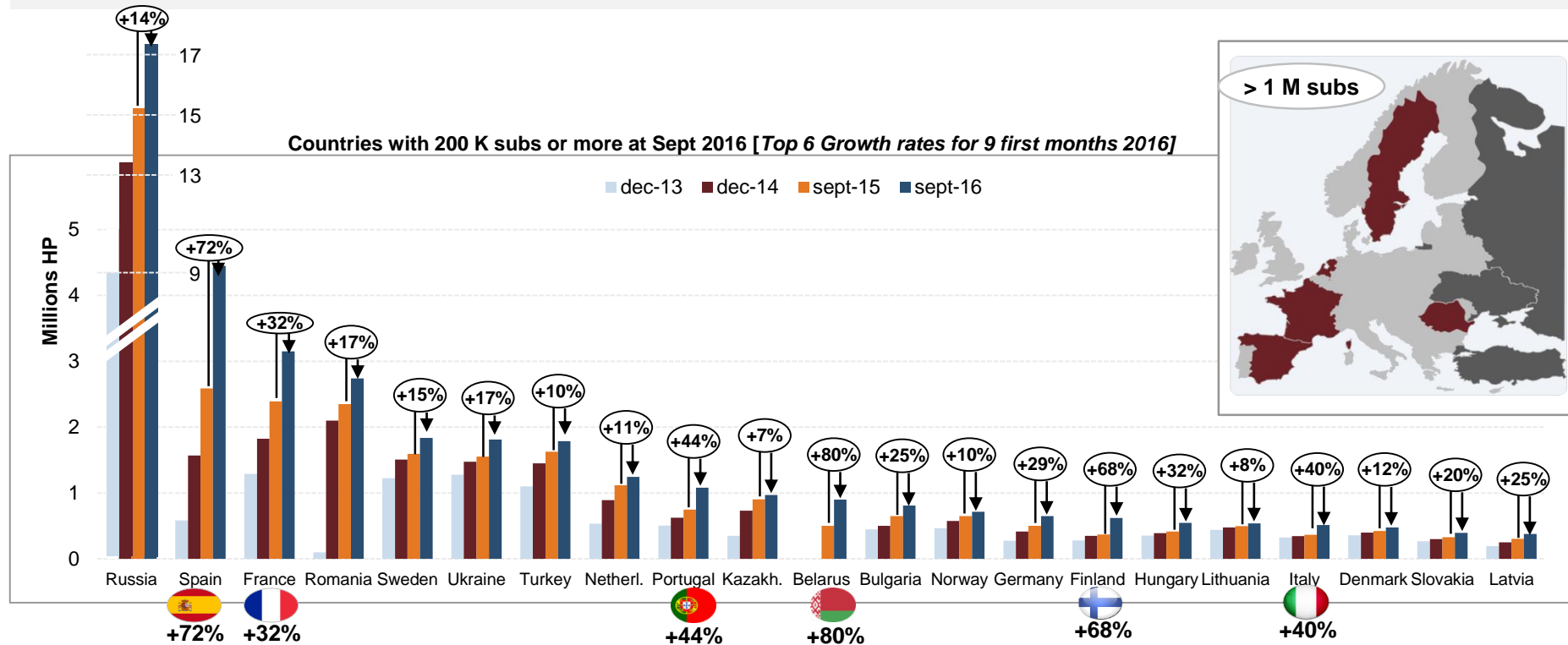
EU28 → 33%

(*) Number of HP/total number of Households

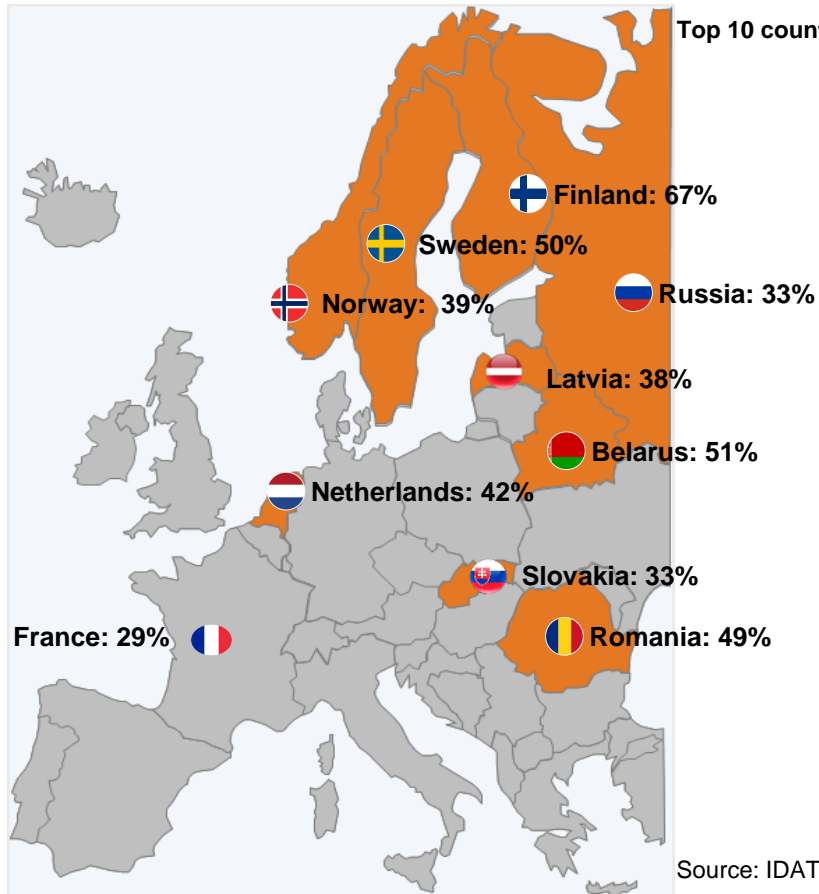
Source: IDATE for FTTH Council Europe

General ranking: FTTH/B Subscribers

- > 9 countries with 1 M subscribers or more in EU39 (5 countries in EU28, in red on the map))
- > Strong growth in Spain, Belarus, Finland and Portugal
- > Dynamism to highlight in France and Italy



General ranking : FTTH/B take-up rate



Average FTTH/B take up rate (*): EU39 → 30%
EU28 → 28%

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

Source: IDATE for FTTH Council Europe

FTTH/B Panorama

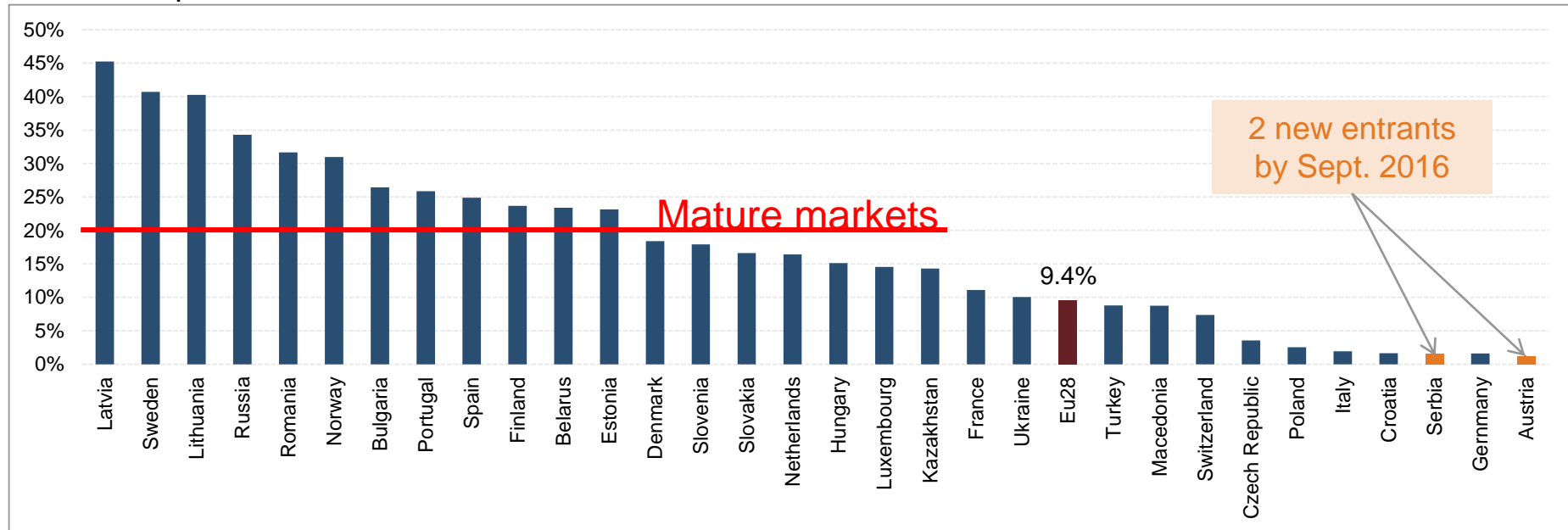
European ranking

European ranking

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

> Only 12/31 European countries with a penetration rate > 20%

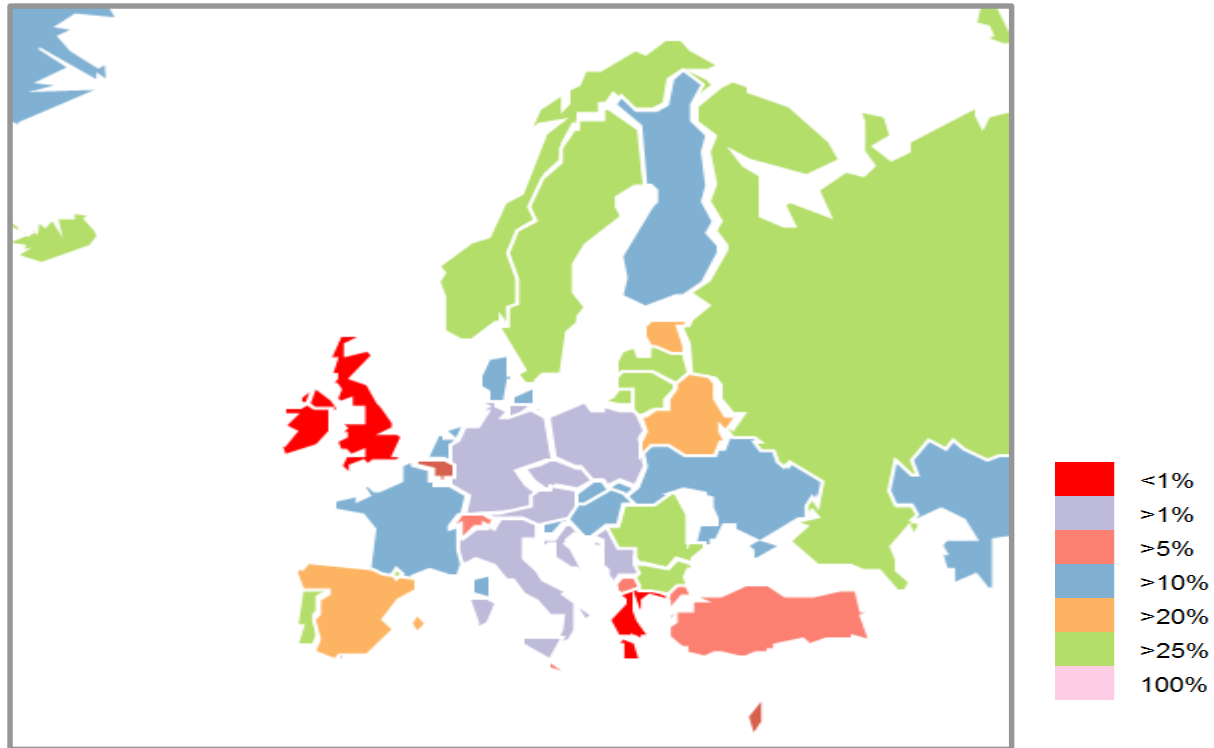
Penetration at Sept 2016



Source: IDATE for FTTH Council Europe

European ranking mapping

Penetration at Sept 2016



Source: IDATE for FTTH Council Europe

FTTH/B Panorama

Key conclusions

Key conclusions

- > There already 31 European countries that are part of the Global ranking ... a positive sign even if the bottom line is only 1%.
- > Even the "reluctant" countries are moving towards FTTH/B technologies. The historic trend shows this evolution and there are more countries reaching the 100% of coverage!
- > End users are migrating to FTTH networks. But the switch to FTTH/B connection is not systematic yet and therefore there is still a large room for communication by operators.
- > Governments and local authorities are entering the game and the Digital Agenda is one of the main important objectives to achieve.
 - 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 to reach more rural areas and in countries where FTTH/B is lagging far behind other architectures
 - "French Model" as an example for Europe?
- > Highest take up rates in Northern and Eastern countries: still strong competition from other architectures elsewhere.
- > Nearly all players, even if less involved in FTTH/B than other architectures, consider that FTTH is the end game! ... and 5G will need Fibre!

MERCI !

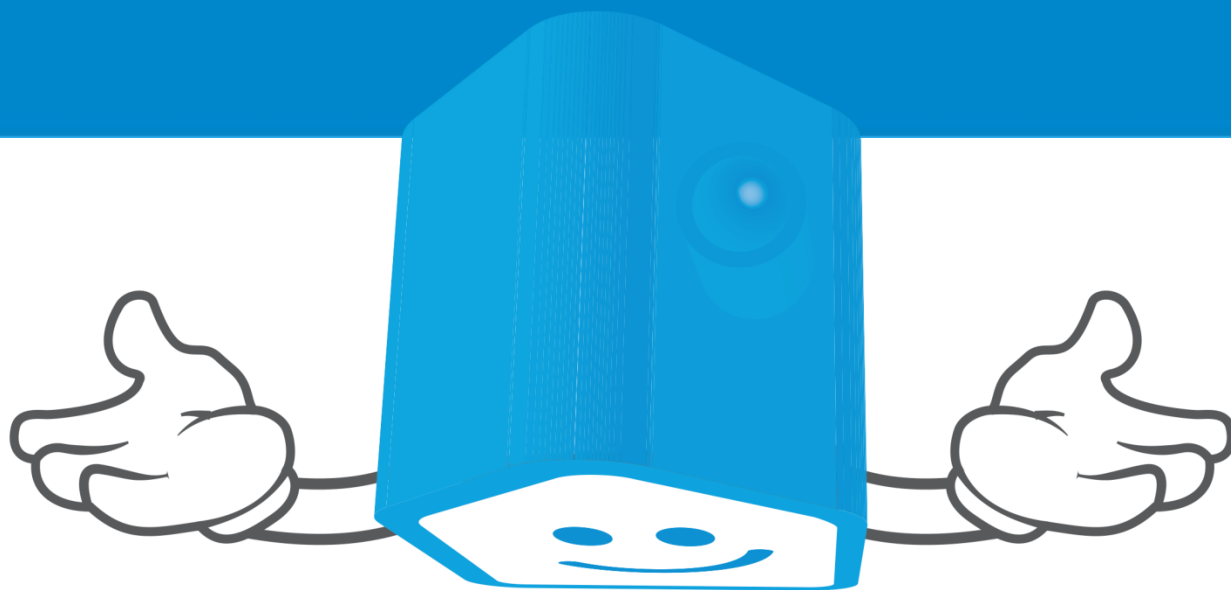
FTTx & Gigabit

Prices are in EUR excl. taxes and for single-department licences (1-5 users)
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Format	Type deliverable	Title	Publication date	Pages	Unit price (EUR)	Product Code
FTTx & Gigabit - 2017 and prior publications					14 000 (stream rate)	M 17500
xls	Dataset	World FTTx Market - data & forecasts up to 2021	2Q/4Q 2017	n.r.	6 000	M 17510DB
ppt	Report	State of World FTTx market	2Q/4Q 2017	40-80	3 000	M 17510SR
xls + ppt	Dataset + Report	World FTTx Market - data & forecasts up to 2020	26/12/2016	43	5 000	M 16505B
doc + ppt	Report	Gigabit Offerings	1Q 2017	20-40	2 000	M 17540M R
doc + ppt	Report	Fiber monetisation	2Q 2017	40-80	3 000	M 17530M R
doc + ppt	Report	SDN/NFV: virtualization & slicing	2Q 2017	40-80	3 000	M 17450M R
doc + ppt	Report	FTTH for emerging countries	2Q 2017	40-80	3 000	M 17550M R
doc + ppt	Report	G.Fast	3Q 2017	40-80	3 000	M 17520M R
doc + ppt	Report	Broadcast/Broadband	4Q 2017	40-80	3 000	M 17230M R
doc + ppt	Report	Connected Cities	02/12/2016	29	2 000	M 16505IN1
doc + ppt	Report	Ultrafast access technologies	01/12/2016	37	2 000	M 16505IN3
doc + ppt	Report	FTTx Vendors	02/10/2016	19	2 000	M 16505IN2
doc + ppt	Report	Digital Agenda Europe	20/07/2016	25	2 000	M 16507M R
doc + ppt	Report	Public Policies for ultra-fast broadband	03/06/2016	96	3 000	M 16408M R
doc + ppt	Report	LTE vs Fiber	18/12/2015	48	3 000	M 16506M R

Titles and scheduling of upcoming publications are indicative – details for available publications can be accessed online

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