Press conference

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

Agenda

- FTTH Council Europe
- FTTH Global & European ranking
- Analysis
  - Leading countries
  - General ranking (Homes Passed & Subscribers)
  - Highest growths
- Key conclusions
FTTH Global Ranking – end-September 2015

Household Penetration of countries* with more than 1% household penetration

*Economies with at least 200,000 households

Source: IDATE for FTTH Council Europe, February 2016
Household Penetration of countries* with more than 1% household penetration

*Economies with at least 200,000 households

Source: IDATE for FTTH Council Europe, February 2016
FTTH Conference 2016
"Calling for a brighter future"

I want fibre!

LUXEXPO
Luxembourg City

Fibre to the Home Council Europe

www.ftthconference.eu
More than 35.9 million FTTH/B subscribers
Nearly 127 million FTTH/B Homes Passed
Historical data and growing trends
January to September 2015

- European Union: interesting momentum since 2013
- CIS countries: higher growth rates for subs than for HP
- General trend: little slow down... 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
Major projects & Categories of players

336 analyzed FTTH/B projects in EU39 at September 2015

% of Homes Passed per category of player

Source: IDATE for FTTH Council Europe
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)

Countries with 1M HP or more at Sept 2015 (million)

Source: IDATE for FTTH Council Europe
General ranking: FTTH/B Coverage

Average FTTH/B coverage (*)

(*) Number of HP/total number of Households

EU39: 39%
EU28: 27%

Top 10 countries
Coverage at end-September 2015

1. Latvia: 100%
2. Lithuania: 100%
3. Andorra: 100%
4. Portugal: 95%
5. Spain: 95%
6. Russia: 91%
7. Sweden: 81%
8. Bulgaria: 65%
9. Iceland: 62%
10. Norway: 59%

Source: IDATE for FTTH Council Europe
General ranking: FTTH/B Subscribers (homes)

8 countries with 1 M subs or more in EU39
5 countries in EU28 (in red on the map)

Countries with 200k subs or more at end-Sept 2015 (million) / Top 4 Growth rates for 9 first months 2015 (%)

Source: IDATE for FTTH Council Europe
General ranking: FTTH/B take-up rate

**Average FTTH/B take-up rate (*)**

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

EU39: 28%
EU28: 27%

**Top 10 countries with +200K subs**

Take-up rate at end-September 2015

1. Finland: 51%
2. Norway: 47%
3. Romania: 47%
4. Sweden: 44%
5. Belarus: 43%
6. Hungary: 40%
7. Netherlands: 40%
8. Lithuania: 33%
9. Russia: 33%
10. Bulgaria: 32%

Source: IDATE for FTTH Council Europe
General ranking: FTTH/B Penetration rate

7 countries with more than 20% penetration – reach fibre maturity
Lithuania, Latvia, Sweden, Russia, Norway, Romania and Bulgaria

Household Penetration of countries with more than 1% household penetration

Source: IDATE for FTTH Council Europe
Key conclusions

• 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
• End users are more aware about FTTH/B, but the switch is not systematic yet: there is still a need for communication by operators
• Governments and local authorities are entering the game
  o DAE’s main targets are respected in all EU28 countries
  o Local authorities are more dynamic in Nordics and France: they should bring a new momentum in countries where FTTH/B is lagging behind other architectures
• The highest take up rates are in Northern and Eastern countries
  o But Spain and France are still leading countries in terms of new subscribers from one year to another

Nearly all players consider that FTTH is the end game!
Thank you !