

Creating a brighter future

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Content

- FTTH Council Europe
- FTTH for a sustainable future
- FTTH Global Panorama
- FTTH European Ranking

- Questions and Answers

FTTH Council Europe



FTTH Council Europe

Our Vision: A sustainable future enabled by Fibre to the Home

Our Mission

- To accelerate FTTH adoption through information and promotion in order to enhance the quality of life, contribute to a better environment and increased competitiveness

Organisation

- Founded in 2004, non-profit industry organisation
- More than 130 members

FTTH for a sustainable future



Fibre to the Home is an enabler

FTTH allows access to enhanced content & services:

- Real speed

Download of 6.5 Gbyte DVD-film:

10 Mbit/s DSL: 1.44 hours



100 Mbit/s FTTH: 8.6 min

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INTERACTIVITY

**FTTH improves the way
people live and work**

- Symmetry

Upload of 300 holiday-photos (700 Mbyte):

1 Mbit/s Upstream: 92 minutes

10 Mbit/s Upstream: 9 minutes

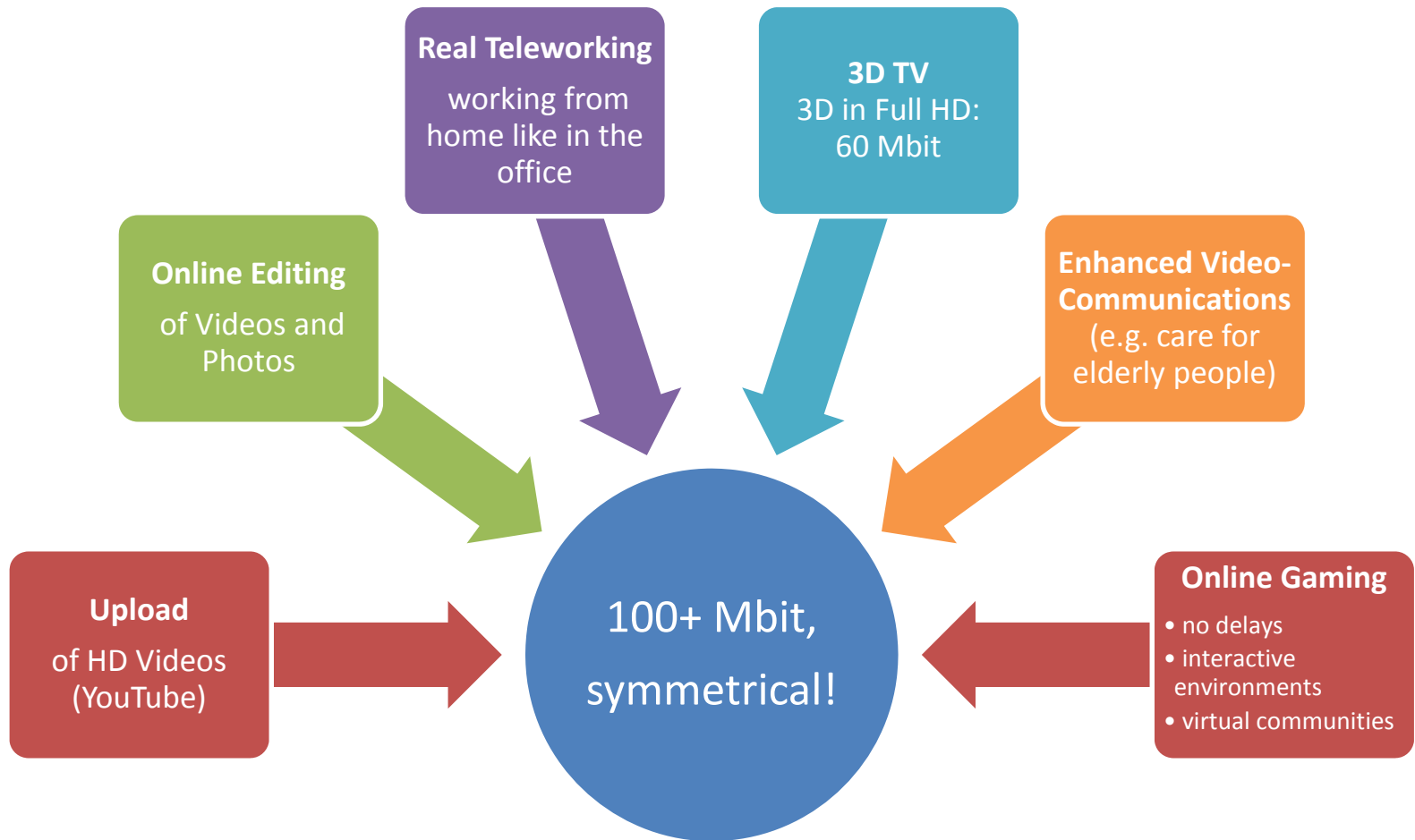
100 Mbit/s Upstream: 56 seconds





FTTH for an enhanced experience

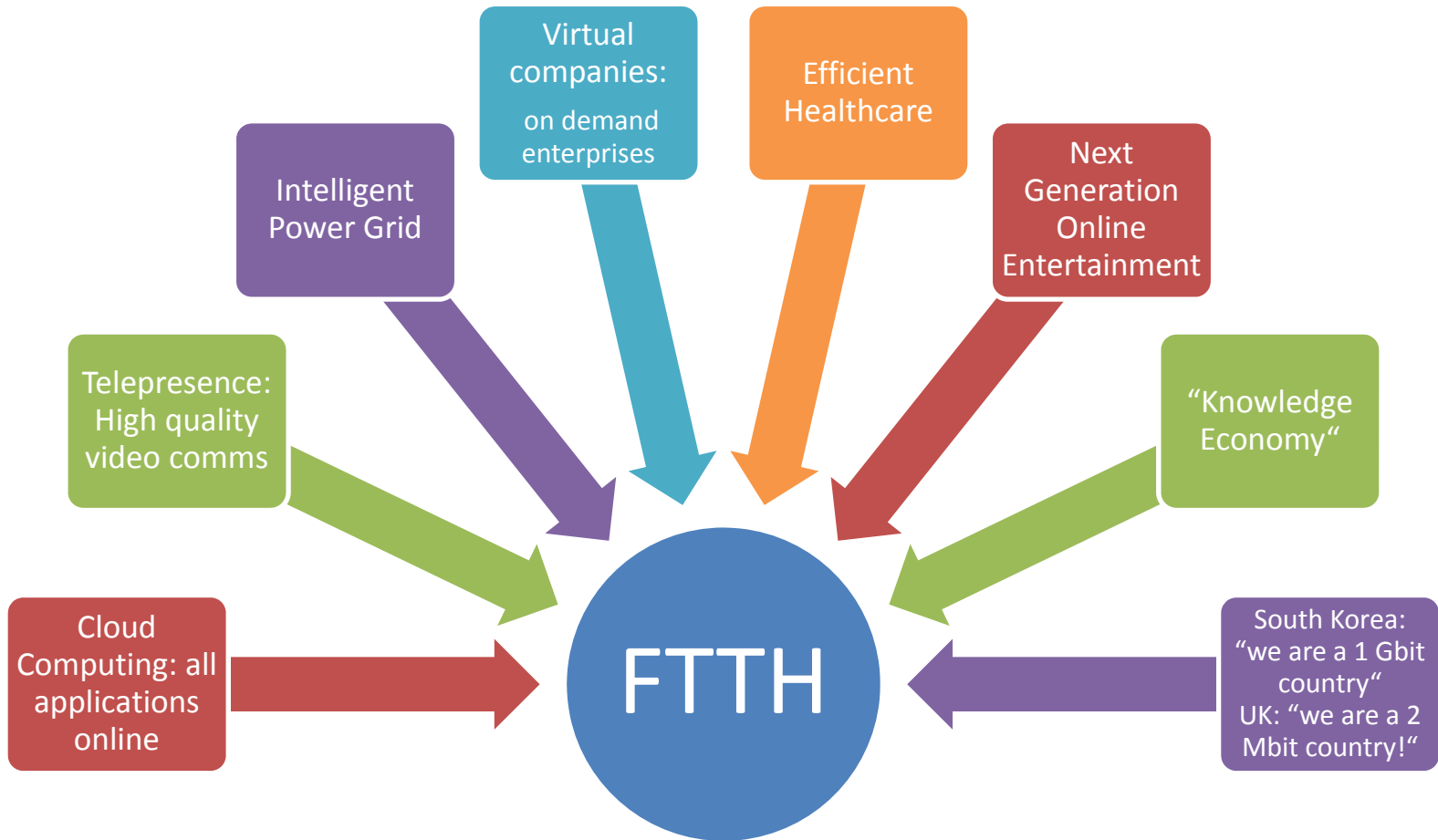
Only FTTH meets the demand for bandwidth





FTTH for a competitive business

Only FTTH allows successful business



FTTH for a better quality of life



FTTH for better quality of life and environment

Study by Ovum for FTTH Council Europe

- FTTH enables users to benefit from real broadband applications, content and services
- FTTH-users are ready to use new services for teleworking, eLearning, etc.
- FTTH-users are more satisfied
- Highest impact in rural areas

Study by PriceWaterhouseCoopers/Ecobilan:

- Using FTTH and FTTH services can save up to CO² equivalent of driving a car for 4,600 km per year – for every household!



FTTH is a key economic driver

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FTTH is a critical driver for the knowledge economy

- Deployment of FTTH creates jobs
- New services create GDP growth, not only from ICT industry (entertainment industry etc.)

FTTH creates business opportunities & competitiveness

- Operators: increased ARPU (30%!), lower churn-rate, Opex savings
- Businesses: new ways of working, reduced travel & office rental costs, better time management, more innovation, better competitiveness
- Regions/Municipalities: retain and attract more businesses & investment, offer cost-efficient services to the community, increase local competitiveness



Fibre to the Home improves our lives

eEntertainment



eLearning



eHealth

Teleworking



eGovernment



Web 2.0

Societal
Environmental



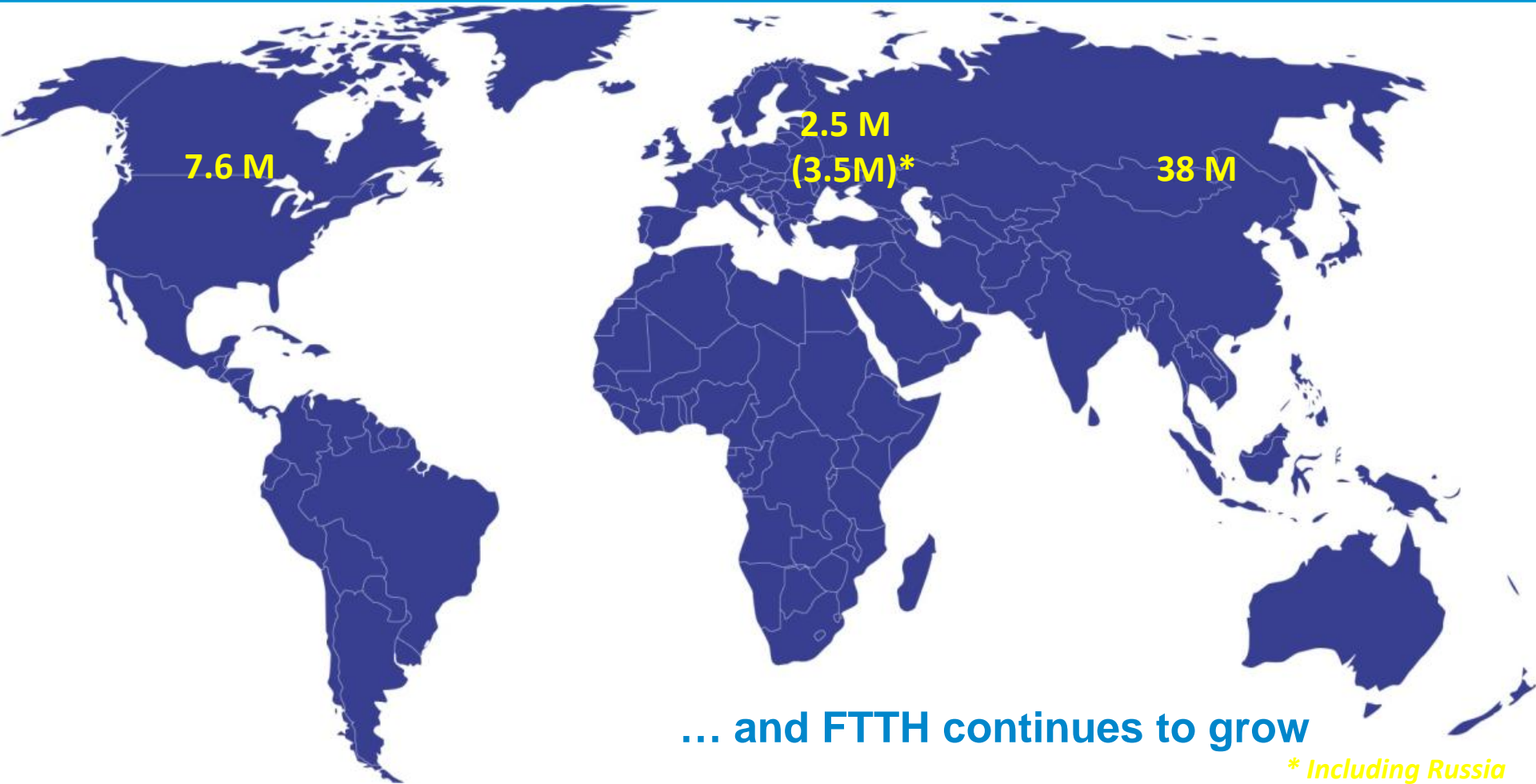
eHome



FTTH Worldwide



FTTH Global panorama 2009



FTTH European Panorama by IDATE

IDATE was commissioned by the FTTH Council Europe to provide a comprehensive overview of FTTH/B deployments in Europe 31 (EU 27 + Norway, Iceland, Switzerland & Andorra) as well as five countries in Eastern Europe (Russia, Ukraine, Croatia, Serbia and Turkey) and 14 countries in Middle East

Methodology

- Desk research
- Direct contacts with FTTH players (questionnaires, phone interviews)
- Information exchange with FTTH Council Europe members
- Direct contacts with IDATE's partners in several European countries

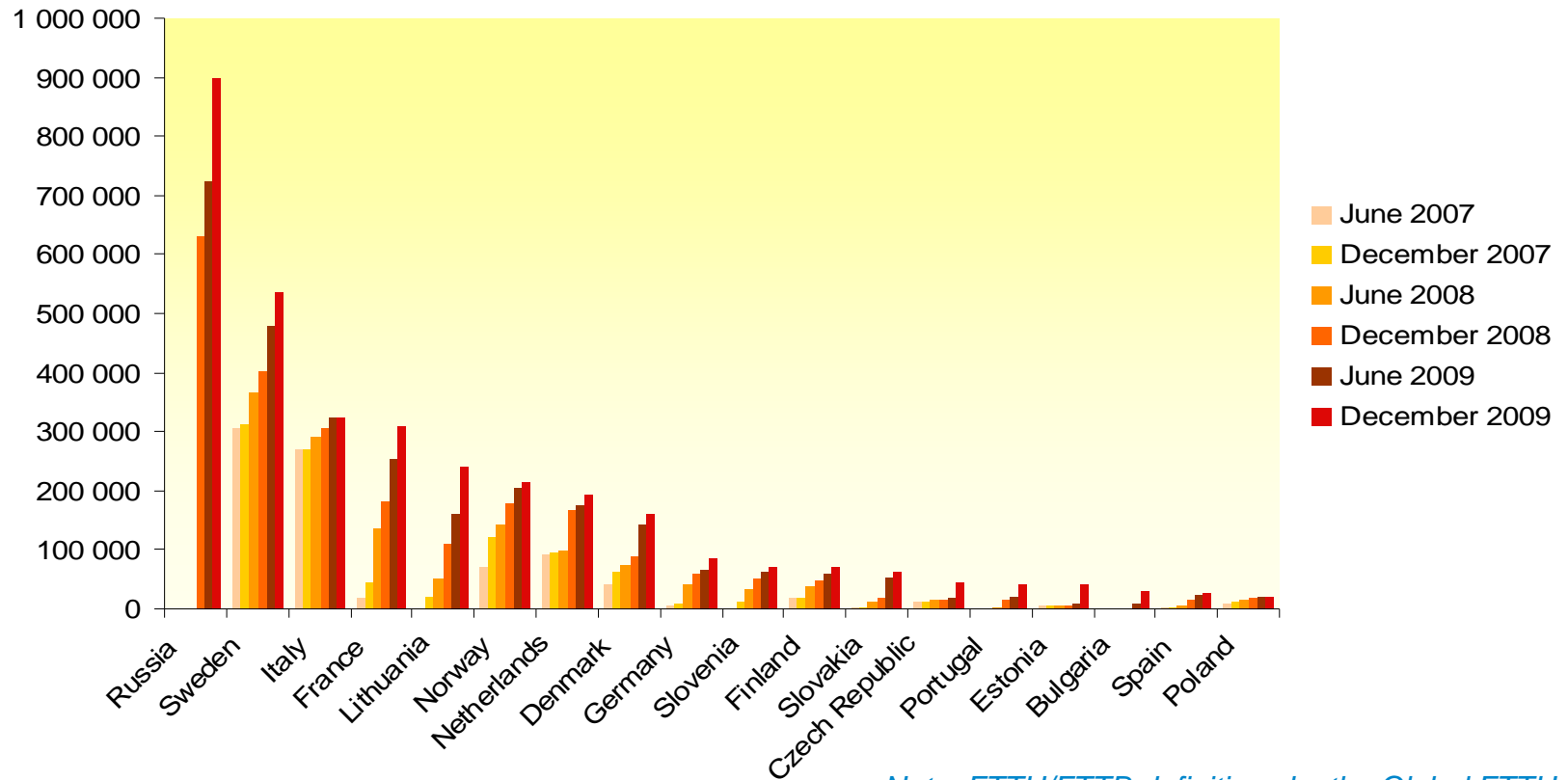
Objectives

- To provide a complete summary of the status of FTTH/B in Europe
- To identify new projects
- To characterise each project: organisation initiating the project, key parameters & figures (Homes and Buildings passed), technical parameters, financing & business model

Note: FTTH/FTTB definitions by the Global FTTH Councils

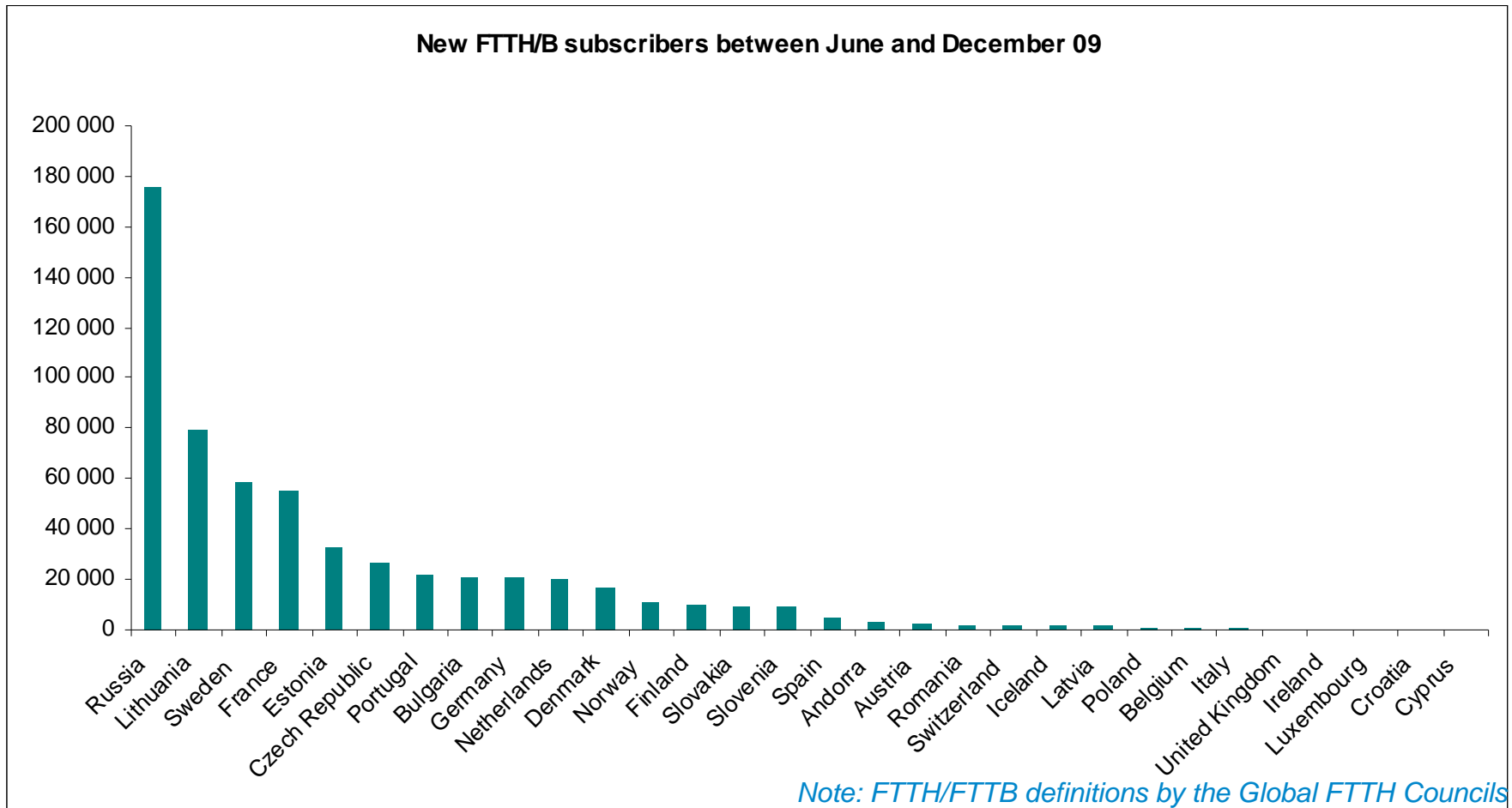
Evolution of FTTH Subscribers in Europe

Evolution of FTTH/B (*) subscribers in Europe



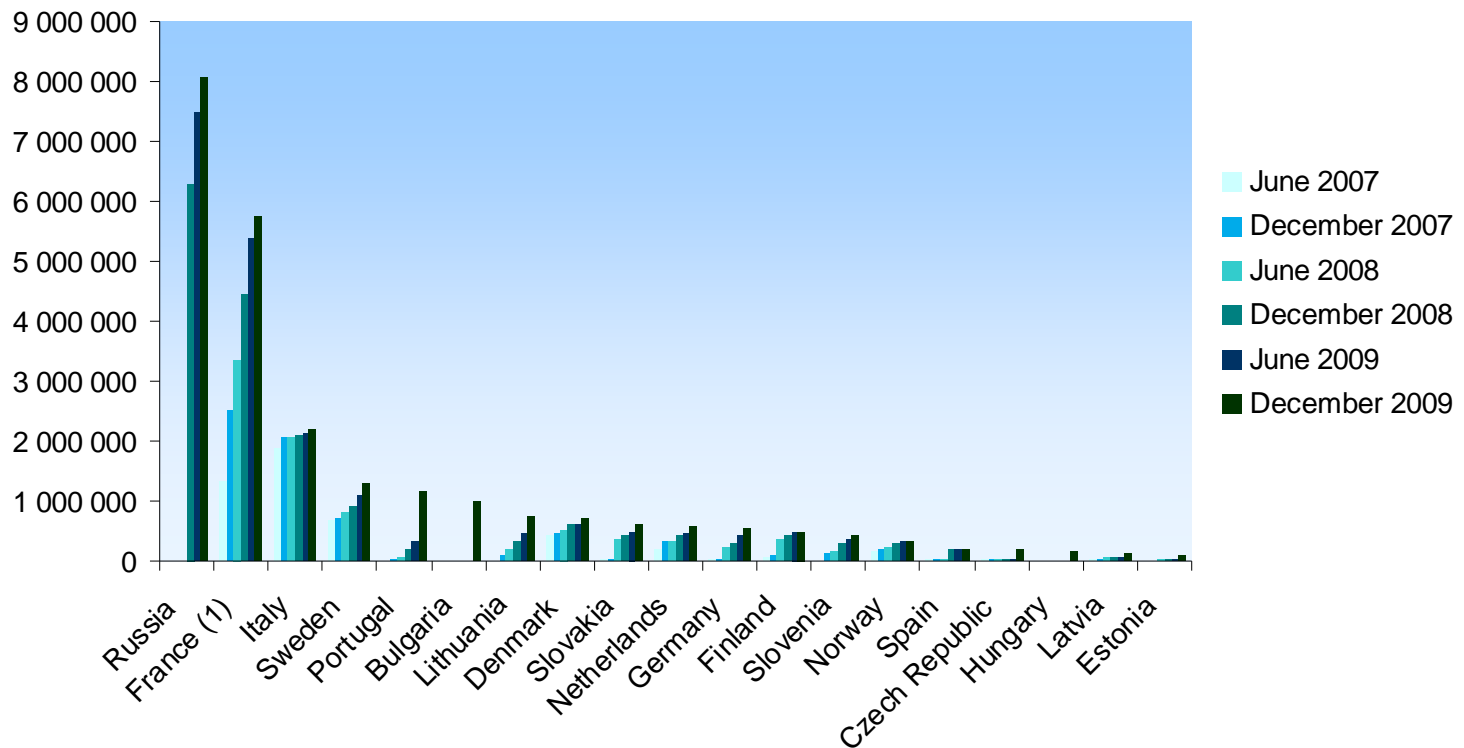
Note: FTTH/FTTB definitions by the Global FTTH Councils

New subscribers per country in last 6 months



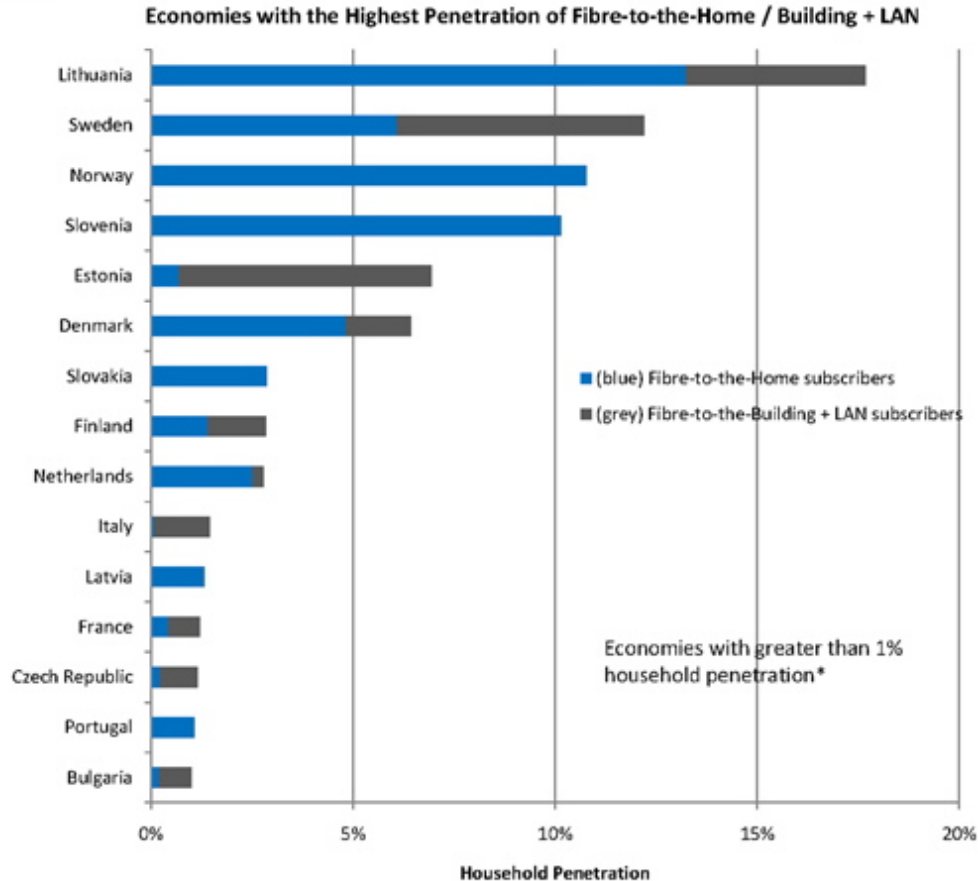
Evolution of FTTH homes passed in Europe

Evolution of FTTH/B (*) Homes Passed in Europe



Note: FTTH/FTTB definitions by the Global FTTH Councils

FTTH European Ranking 2009



December 2009 European Ranking
Source: FTTH Council Europe and IDATE
February 2010

*Economies with at least 200,000 households

FTTH European Ranking 2009

	Countries	Households	FTTH/B subs Dec 2009	Penetration December 2009	FTTH	FTTB
1	Lithuania	1 357 000	239 900	17,68%	180	60
2	Sweden	4 400 000	537 100	12,21%	269	269
3	Norway	2 000 000	215 400	10,77%	215	0
4	Slovenia	700 000	71 000	10,14%	71	0
5	Estonia	582 000	40 400	6,94%	4	36
6	Denmark	2 500 000	160 800	6,43%	121	40
7	Slovakia	2 200 000	63 000	2,86%	63	0
8	Finland	2 476 500	70 440	2,84%	35	35
9	Netherlands	7 000 000	194 800	2,78%	175	19
10	Italy	22 300 000	325 000	1,46%	16	309
11	Latvia	896 916	11 800	1,32%	12	0
12	France	25 500 000	308 200	1,21%	108	200
13	Czech Republic	3 800 000	44 000	1,16%	9	35
14	Portugal	3 900 000	41 500	1,06%	42	0
15	Bulgaria	2 900 000	29 000	1,00%	6	23

Source: FTTH European Ranking, FTTH Council Europe & IDATE, December 2009

Note: The Ranking covers all countries with at least 200,000 households where FTTH/B penetration has reached 1% of the total number of homes.

Conclusions

The FTTH/B market is growing steadily in Western/Northern Europe

Several Eastern European countries are significantly deploying FTTH/B and contributing to future growth

- Lithuania is new number one
- Slovenia, Estonia, Slovakia, Latvia, Czech Republic and Bulgaria are also all in the Ranking

Portugal has proven that a joint effort of all players can push forward a country within just one year

France joins Italy as the second European G-20 country to join the Ranking. UK and Germany are still missing.

Four countries have more than 15% penetration

In six countries, more than 10% of households are already using FTTH/B



Taking your life to new horizons



Fibre to the Home
Council Europe

www.ftthcouncil.eu

Thank you for your attention!

