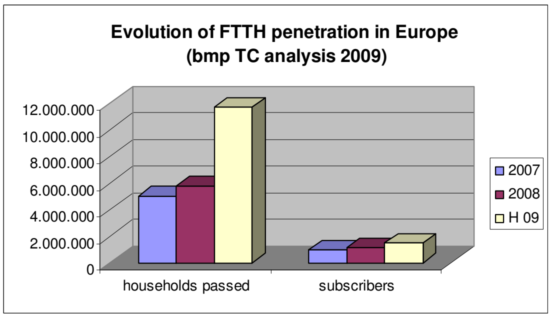
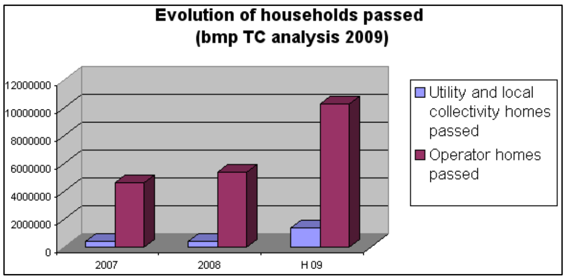
bmp TC European FTTH Atlas 2009
Close monitoring of some analysis results

a comprehensive and factual analysis of European FTTH markets
by leading international strategy consultants
involved in (inter)national Broadband Access Projects since 1993

FTTH[1] is becoming a significant market segment in Europe, rapidly growing with a total number of **households passed** which has doubled in one year, from **5,8 to 11,7 million**! bmp TC has studied the development in detail in 32 European countries. Overall, 185 referenced projects in Europe (Russia excluded) show the dynamics inherent to the FTTB[2], FTTLA[3] and FTTH deployments and enable to get an understanding of the specifics business models and general trends in the European FTTH market.



Municipalities and utility companies are getting to be major actors within this market. FTTH connections installed by them are growing more rapidly than the one of telecom operators. The growth of the number of households passed by utilities or public authorities' projects has increased by 230% since 2007, while the number of households passed by operators' projects increased by 124% in the same time frame.

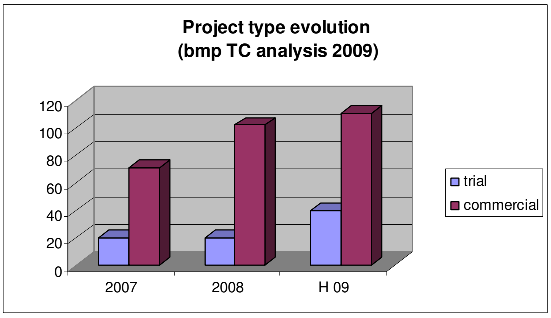


[1] Fiber to the Home
[2] Fiber to the Building
[3] Fiber to the Last Amplifier

Furthermore **open access** is expected to be one of the central forms implemented within FTTH markets in Europe. **Open access** FTTH deployments now reach 56 projects with 9 new additions in 2009 alone (up to mid '09). Throughout Europe public authorities and companies are aware of the advantages inherent to a neutral, carriers' carrier network.

Different technologies are available, however **PON** is gaining foothold compared to P2P and Ethernet technology projects. In 2008 one out of seven of the projects were based on the PON technology with a rapidly growing uptake with new projects being initiated.

One the whole the number of commercial projects and trials are increasing steadily, but in a higher proportion concerning **trials** (having doubled since last year).



Due to the spectacular growth of the total number of activities recently, the take up rate calculated within the bmp TC FTTH Atlas i.e. the average rate of **subscribers out of the households passed** has reduced to 13% (20% in 2008). It is expected to grow in the coming years as commercialisation reaches more maturity.

Manufacturers which support operators with the roll out of their FTTH network are briefly described in the bmp TC FTTH Atlas 2009. The most implicated ones regarding partnerships and projects remain Cisco, Alcatel and Packetfront.