bmp TELECOMMUNICATIONS CONSULTANTS

SCHEDULED FOR NOVEMBER 2008

bmp TC European FTTH Atlas 2008

a comprehensive and factual analysis of European FTTH markets

by leading international strategy consultants
involved in (inter)national Broadband Access Projects since 1993

In September 2008 the European Commission has launched a public consultation on the regulatory principles to be applied by EU Member States to Next Generation Access broadband networks (NGA) with the objective to foster investments in FTTx.

Competition and the appetite of the consumers for multimedia offerings entice operators to deploy the Next Generation of Local Loop Infrastructure, enabling higher Data Rates up to the Consumer. **Fiber based broadband access is considered the ultimate and most future-proof last mile platform since its capacity for high bandwidth is unmatched by any other delivery platform**.

On a statistical point of view, it seems that now FTTH is finally coming in Europe. But if major European operators have so far announced their first massive launch of fibre based network deployments such as Swisscom or Openreach (BT)**, most of the European projects seem to remain at a trial step and these are not yet significant in number of households passed.** Until today solely public driven projects have been extensively developed in Europe (e.g. in Sweden with 176 municipal projects whereas according to B2, 5-7% of all subscribers are connected to a neutral public active network).

For its second year in row, bmp TC European FTTH Atlas provides a detailed and comprehensive review of the current status of the FTTH markets in Europe.

Though lagging behind the FTTH growth occurring in North-America or in Asia, Europe undergoes a number of new activities even if new built activities occur in markets such as Bulgaria, Poland, Slovakia, Slovenia or Germany. Most well known projects are taking place in Sweden, Italy, Denmark, Norway and the Netherlands whereas NGA networks are still remaining at a project step in several European countries.

The **bmp TC FTTH Atlas** gives a concise and factual overview of the European FTTH market, including statistics and general information about FTTH and a view of the general trends in Europe.

It focuses on each country, including an analysis of significant FTTH deployments in each market considered and **a presentation of the key players and of each of the projects** implemented. The report aims at covering the strategies and developments for each of the studied countries to develop FTTH.

Beside the description of the FTTH markets, bmp TC's consultants have included their personal analysis as they regularly work in these markets.

Scope of the study: 31 countries analysed! Some 120 FTTH projects described!
EU 27 (Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Danemark, Estonia, Finnland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxemburg, Malta, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, the Netherlands, the United Kingdom)
and Iceland, Norway, Switzerland and Turkey

Benefits:

- Understand the dynamics through a direct comparison of the FTTH projects and through the evolution of the FTTH activities since 2007
- Gather an analysis by country showing specificities and newest developments
- Apprehend the business case and plans related to FTTH
- Assess main FTTH players & their strategies: incumbent, altnets, local operators
- Hands-on Analysis by the consultants according to their experience in these markets
- Be up-to-date: latest trends being included with a personal consultants' analysis

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STUDY OUTLINE

CONTENTS:

Introductory words
Summary
- The FTTH market in Europe-
- General trends and key issues –regulation included
- Technology description (brief)

For each country:
- Overview and general analysis, analysis of key developments, issues and trends regarding FTTH activities,
- Description of most identified FTTH project, related to scope, technology, equipement supplier, forecasts….
- Description of the players and assessment of their strategy

Key questions addressed:

- How is the European FTTH market evolving, compared to the rest of the world? Which are the key developments and factors influencing these markets?
- How are altnets developing FTTH and what is the weight of the incumbent in each country's FTTH market?
- What are the dynamics behind FTTH, according to each country's specifics?
- What are the measures implemented by the governments, public authorities to develop FTTH? What is the role of local authorities in FTTH deployment? Which is the impact of the regulation authority?
- Will FTTH be deployed more easily in emerging broadband markets than in mature ones?
- Which business plan lies behind the first mass and/or commercial deployements?
- Which services are being offered related to FTTH? How to drive ARPU up?
- Which FTTH architecture prevails? which is the relative importance of each equipement supplier?

Examples of FIGURE- Project statistics:

Zone	Europe
Country	Finland
Location	Central Ostrobothnia (rural areas)
Extension plan	Central Ostrobothnia (cities)
Operator:	Geskikoasea
shareholders:	Central Ostrobothnia
public authority	Ostrobothnia region council
Website	www.keski-pohjanmaa.fi/
public subsidy	50% support from the region
ProjectYear	

Year	2008				
Project status:	commercial			start date:	2008
Techpartner1	Cisco	Project type:	open network	finalisation date:	2010
Techpartner2	HP	service offers:			
Techpartner3		tariff basic:		strategic partners:	
		tariff premium:			
forecast Hhpassed:	n.a.	existing no. of km fiber:		forecast investment:	6.000.000
Hhpassed:	0	forecast no.of km fiber:	400		
forecast Hh passed date:	n.a.			Investment date:	2010
number clients:	0			investment up to now:	
forecast clients:	2000	technology type	P2P		
forecast clients date:	2010	topoly comment:	They are offering dark fiber. The Central Ostrobothnia network will be connected to the other Ostrobothian networks (they work together)		
Comments	By 2010, they expect 2000 suscribers because they focus more on rural areas. When they begin covering cities, the number will increase and they expect 10.000 suscribers by 2017. It is more difficult to enter the cities because private operators already have networks there and they do not want to compete with them. They want that anybody in Ostrobothnia can have a 100 Mbps FTTH connection.				

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