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**NEW VERSION 2009!**
**bmp TC European FTTH Atlas 2009**
**a comprehensive and factual analysis of European FTTH markets**

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

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**2009** will definitely stay as a **reference year** regarding FTTH, especially in Europe. Many projects have secured their financing so that deployments have been starting this year.

The total number of **projects** has been increasing significantly, with the prospects of expanding rapidly in the near future. bmp TC European FTTH atlas include a detailed description of **194 FTTH** (or x) projects.

**Governments** have been announcing or will be announcing programmes to foster FTTH within the nation, this is happening throughout Europe from Finland, Belgium or Slovenia to Greece.

**As well, local public authorities** and/or their **energy distribution companies** as seen in Switzerland, in Germany, in Austria, in France, in the Nordic countries but also in Eastern European markets are becoming major actors of FTTH deployments.

**Open Access** networks has been confirmed as a major trend for FTTH. Even countries reluctant to the concept such as Germany are seeing open access FTTH projects emerging. Furthermore some national regulators have taken or are about to take decisions regarding the sharing of ducts and fibre as well as the number of fibre to be laid to each customer. The regulatory framework or the agreements reached in between the players differ from country to country.

Though lagging behind the FTTH growth occurring in North-America or in Asia, Europe undergoes an impressive number of new activities and seems on the road to FTTH as a strategy element of the telecom actors

Most well known projects are taking place in Sweden, Italy, Denmark, Norway and the Netherlands, other markets notice first projects or trials in view of having later deployments.

Currently, the country with the highest FTTH penetration rate remains Sweden with 8,5% of the households. In terms of actual numbers of FTTH connections, Sweden one more time boasts the most, with nearly 480.000 FTTH homes, followed by Norway with 300.000, and France with 160.000.

**For its third year in row, 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 latest developments for each of the studied countries.

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: 33 countries analysed! Nearly 200 FTTH projects described!**  
**EU 27 (Austria, Belgium, Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxemburg, Malta, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, the Netherlands, the United Kingdom)**  
**and Andorra, Croatia, 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
- 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

**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....
- Assessment of the actors' 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 deployments?
- 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:	Geslikoasea		
shareholders:	Central Ostrobothnia		
public authority	Ostrobothnia region council		
Website	www.keski-pohjanmaa.fi/		
public subsidy	50% support from the region		
ProjectYear			

  

▶ Year	2009		
Project status:	commercial	Project type:	open
Techpartner1	Cisco	start date:	2008
Techpartner2		finalisation date:	2010
Techpartner3		service offers:	
forecast Hhpassed:	n.a	tariff basic:	
Hhpassed:	200	tariff premium:	
forecast Hh passed date:	n.a	existing no. of km fiber:	
number clients:	100	forecast no.of km fiber:	
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	The Finnish subregion of Kaustinen comprises seven small municipalities located of the Central ostrobothnia in Western Finland.This project bring todays the first finland genuine Triple Play network , bringing internet,telephonic traffic and television images to remove households and companies in the kaustinen subregion via a fiber network.Each household cunsommer pay 50 euros/month,Over the		

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