

**we connect technology,
policy and finance**

Karin Ahl, Chair of Policy & Regulation Committee
FTTH Council Europe

Gimme fibre Day Celebration Great
9 Novembre 2018, Gothenburg, Sweden



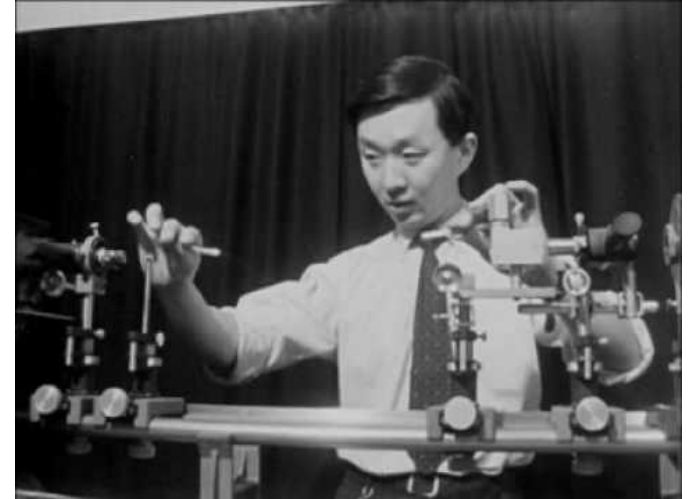
On 4 November fibre enthusiasts all over the world joined the FTTH Council Europe and the other FTTH Councils Global Alliance (FCGA) sister associations in celebrating Gimme Fibre Day, paying tribute to Professor Charles Kuen Kao's exceptional achievements in fibre optics communications.

[#GimmeFibre](https://twitter.com/GimmeFibre)

<http://www.gimmefiber.eu>

'By showing the superior capacity of fibre optic cables for transmitting information, Professor Kao initiated a revolution in the world's electronic communications sector and paved the way for the FTTH Councils' mission.

Professor Kao's findings dramatically changed our mode of communications and enabled the creation of a full ecosystem for innovation.'



The FTTH Councils' Global Alliance

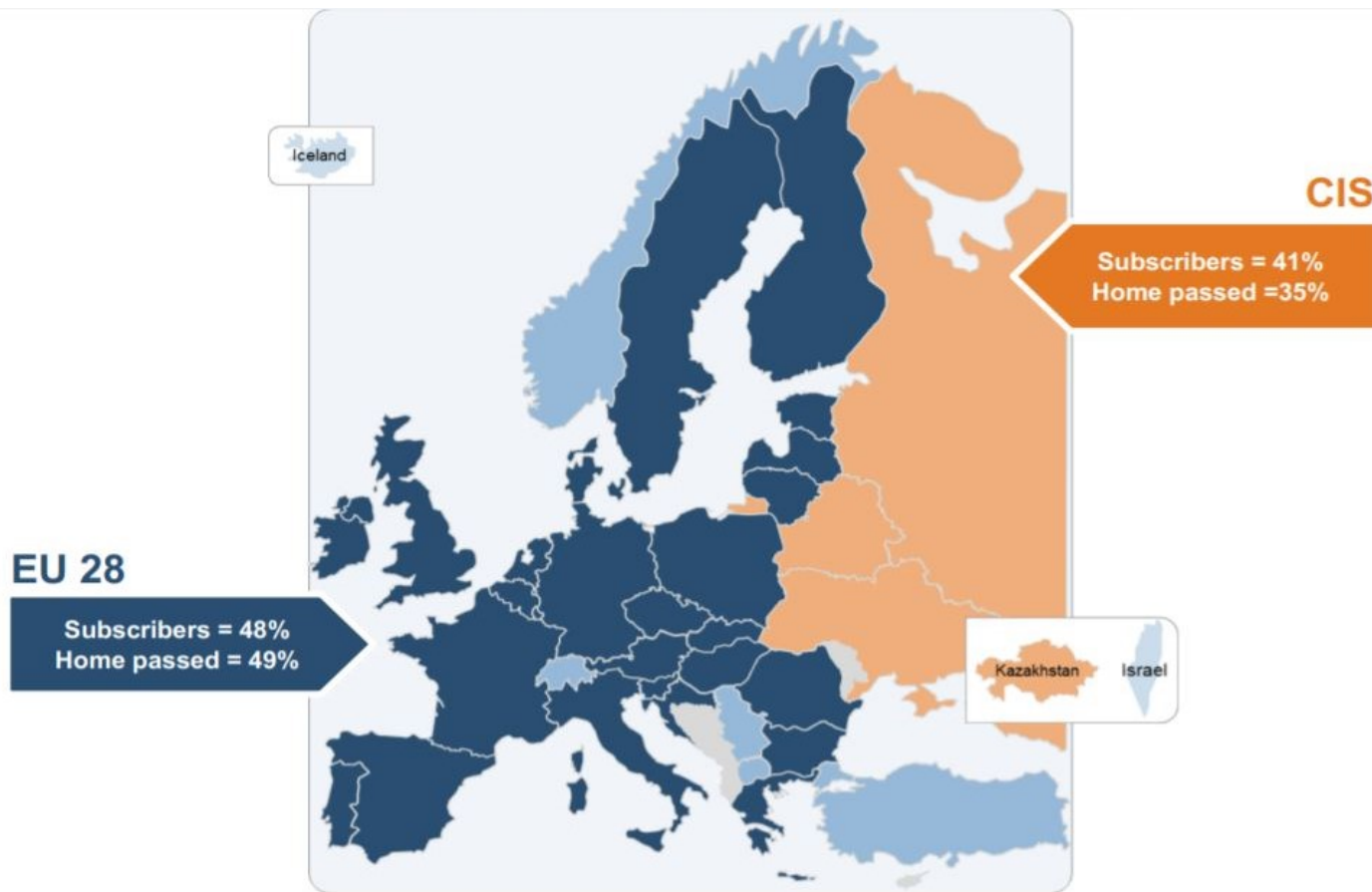
Overview



- The State of Fibre: FTTH/B Market Panorama
- Driving Fibre Investment: Policy & Regulation
- Fibre for 5G
- Socioeconomic Benefits of Fibre Study: Main Use Cases

FTTH/B figures – September 2017

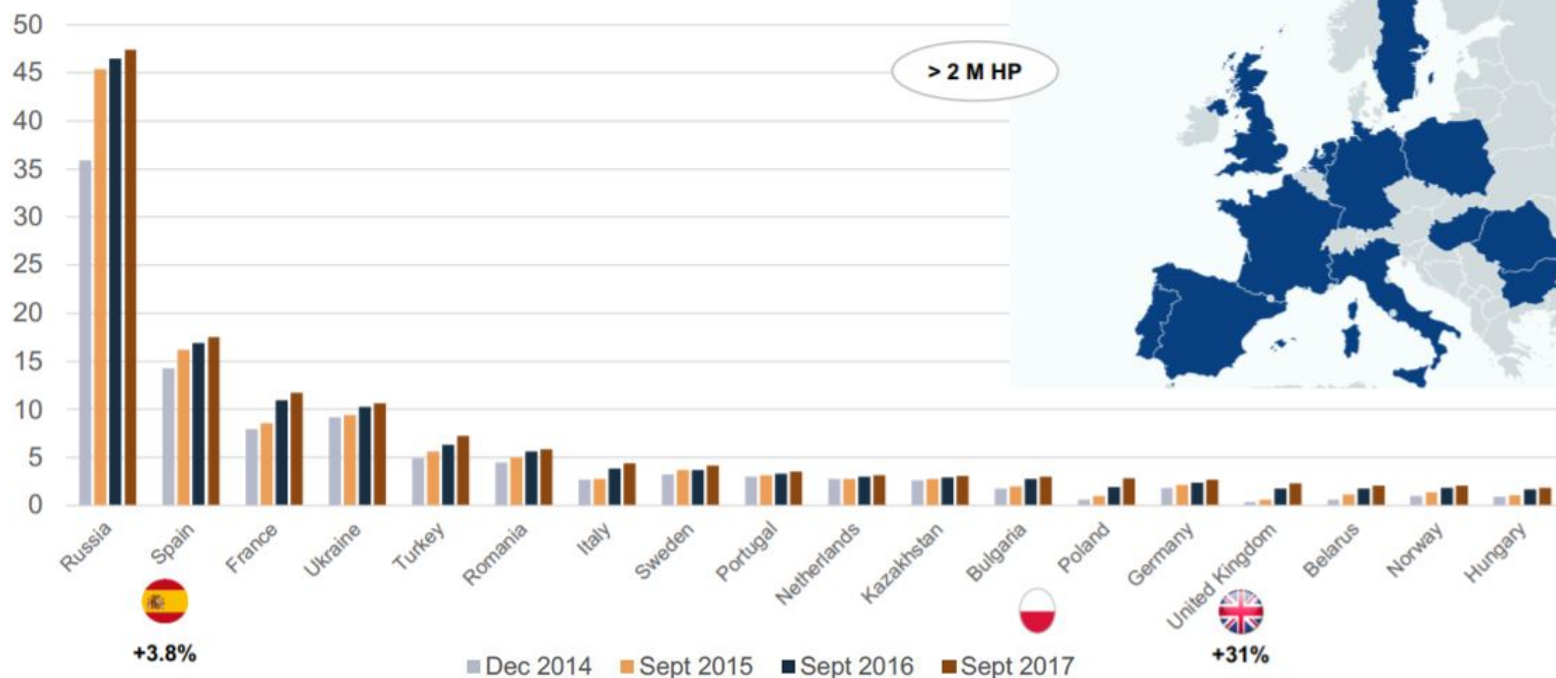
FTTH/B Figures, September 2017 – Close to 51.6 million FTTH/B subscribers and more than 148 million FTTH/B Homes Passed in EU39



General ranking: FTTH/B Homes Passed

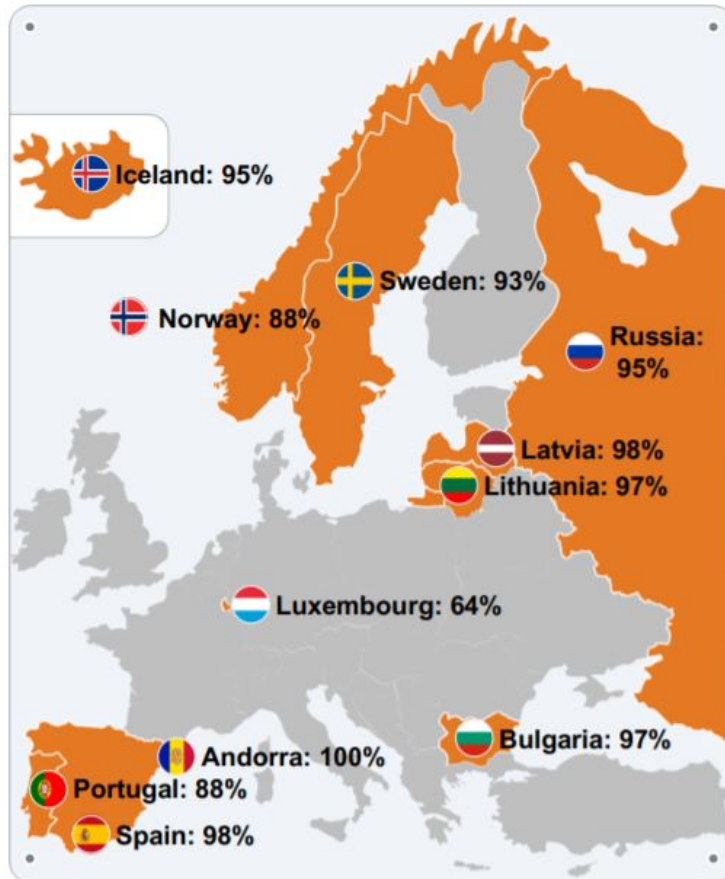
- 18 countries with 2 M HP or more in EU39 (12 countries in EU28, in blue on the map)
- Highest growth rates do not necessarily occur in the largest markets and this confirms that the interest on FTTH/B is growing (e.g. Poland: +46% and UK: +31%) even in countries where it is not the leading NGA solution

Countries with 2 M HP or more at Sept 2017 [Top 5 Growth annual rates]
(million)



Top Ten - FTTH/B Coverage

General ranking: FTTH/B coverage



Top countries in coverage at September 2017

Average FTTH/B coverage stable in 2017 (*):

EU39 → 45%
EU28 → 33%

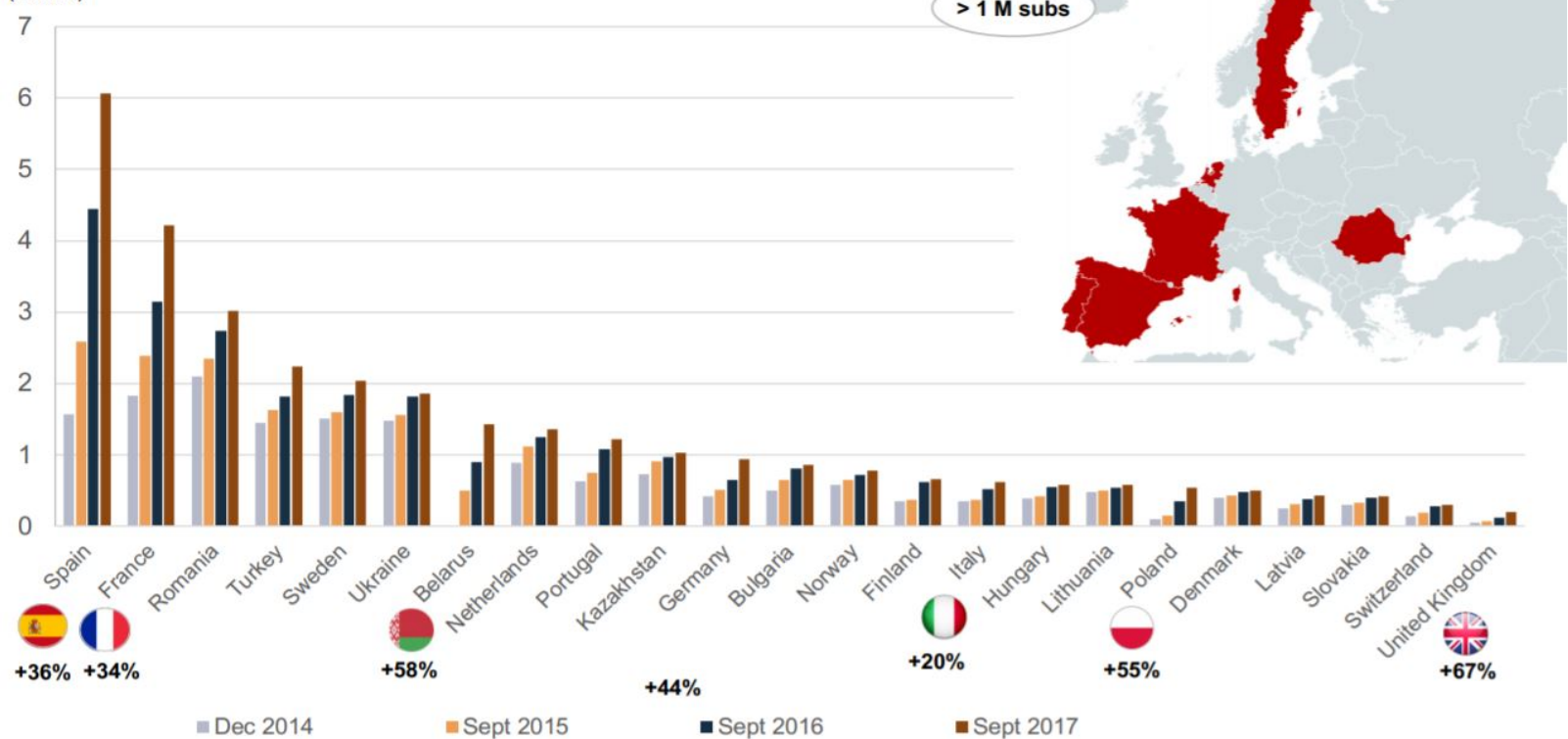
(*) Number of HP/total number of Households

FTTH/B Take-up

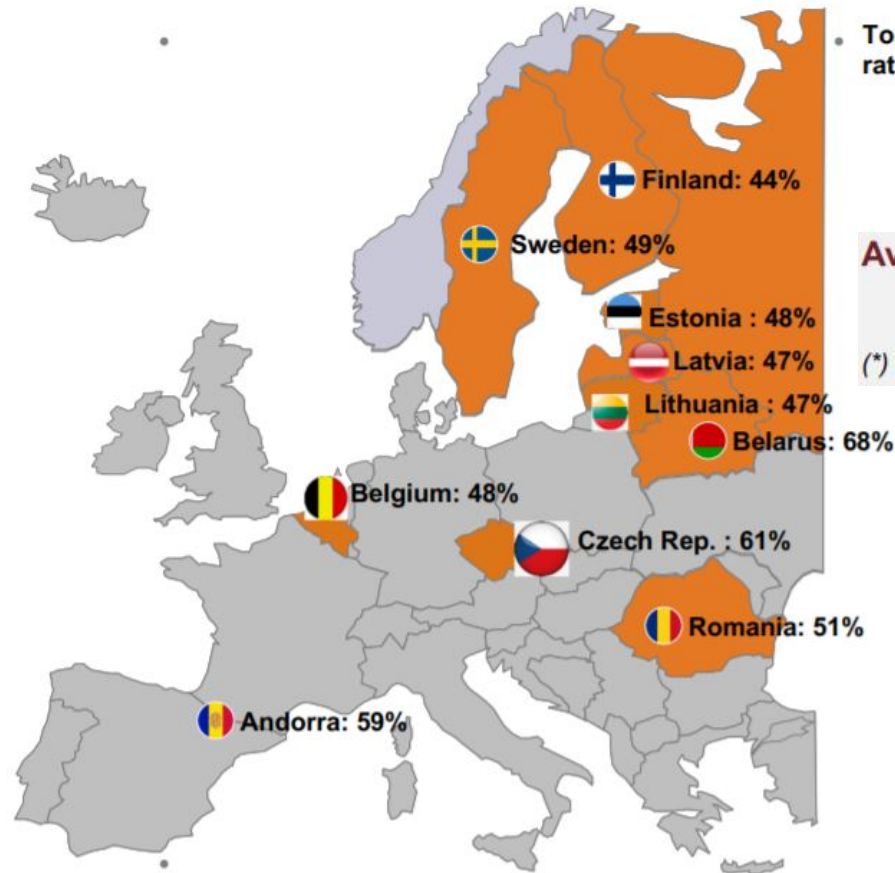
General ranking: FTTH/B subscribers

- 11 countries with 1 M subscribers or more in EU39 (6 countries in EU28, in red on the map)
- Strong growth in Belarus, Germany, Poland and UK
- Sharp advances in France, Spain and Italy

Countries with 200 K subs or more at Sept 2017 [Top Growth rates for 9 first months 2017]
(million)



Top Ten - FTTH/B Takeup



Average FTTH/B take up rate (*): EU39 → 35%
EU28 → 32%

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

Driving Fibre Investment: Policy & Regulatory Solutions

Clear political commitment to full fibre through ambitious speed and coverage targets

Prioritisation of regulatory measures and access remedies that directly incentivise competitive infrastructure deployment and competitive market structure (e.g. effective duct and pole access)

Regulatory certainty and clarity to promote new fibre investments by existing and new players alike

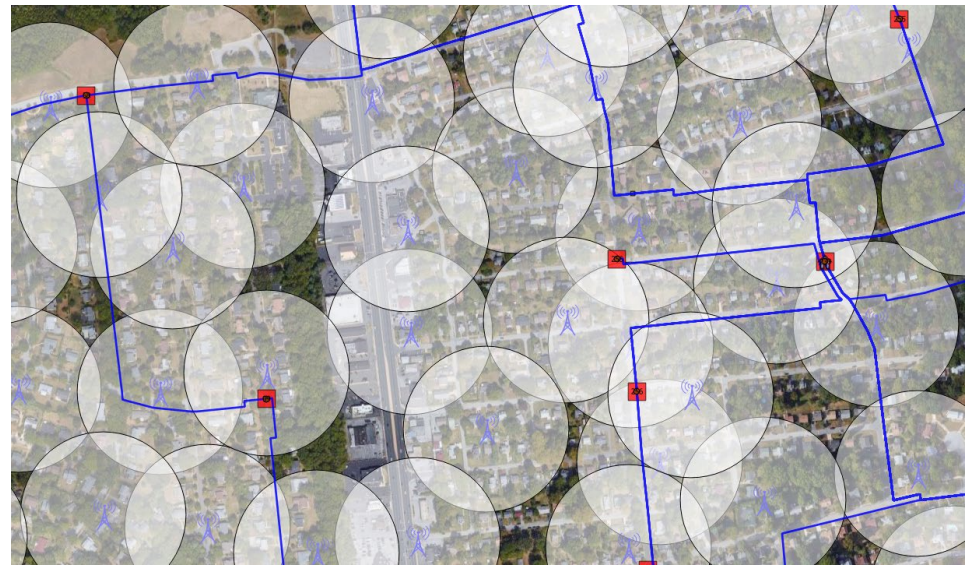
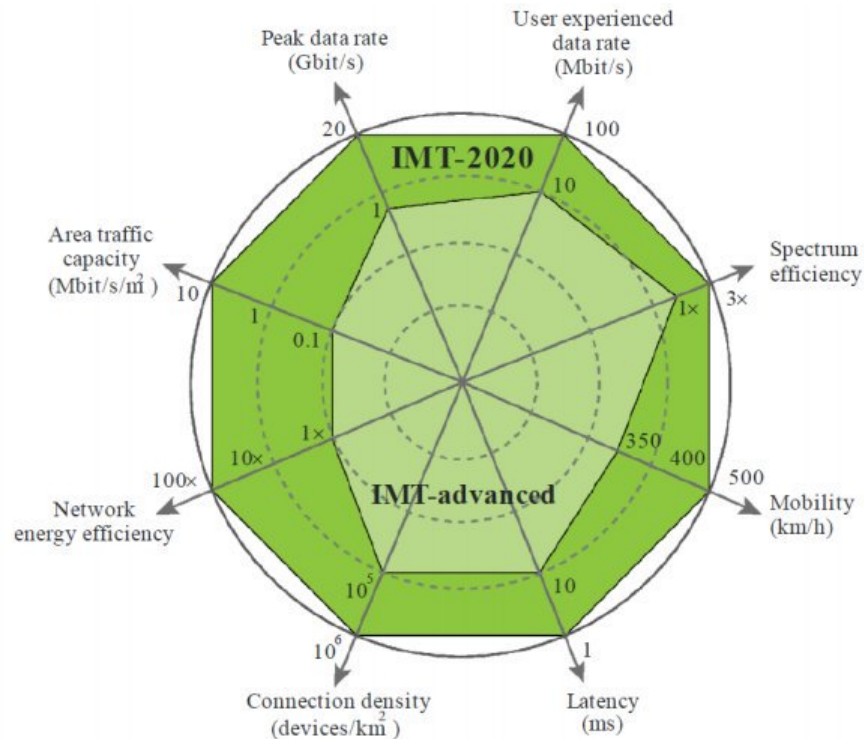
Focus on promoting new fibre investment models (e.g. co-investment and wholesale-only business models) with the aim of facilitating the deployment of VHC networks deeper including by attracting new capital

Focus on reducing the cost of fibre deployment, e.g. fostering the availability of good civil engineering infrastructure and promoting a regulatory framework supporting fibre deployment

Fibre for 5G

5G ≠ 4G: 5G needs Fibre

5G needs Fibre in 'every street'



Fronthaul

Backhaul

Socioeconomic benefits of FTTH: Main Use Cases

Socioeconomic benefits of FTTH Study 2017 by WIK Consult

- New use cases require digital networks with quality parameters that can only be provided by fibre. The future development of virtual & augmented reality, tactile internet and immersive media will also further drive up bandwidth demand
- **Main use cases from our 2017 study:**
 1. **Digital Health - case study in Sweden:** Sweden is a front-runner in providing care to the elderly through Ambient Assisted Living (AAL) and digital technologies
 2. **Digital Education – case study in Sweden:** Fibre as a key success factor for excellent and fair education. Important role of distance learning, given the country's demographic context
 3. **Smart Farming – case study in the Netherlands:** FTTH allowing digitalisation of agriculture, with considerable gains in terms of business efficiency, automation and environmental protection



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Thank you for your attention!

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