
Ultra-fast broadband scorecard as of 30 June 2009

In April of this year, ARCEP produced the first fixed ultra-fast broadband scorecard that makes it possible to track the status of fibre rollouts around the country, the use of France Telecom civil engineering offers and the implementation of fibre-to-the-home (FTTH) network sharing by all operators.

This scorecard covers both FTTH and hybrid fibre-coaxial cable ultra-fast broadband offers. Both of these technologies enable the supply of very high-speed fixed solutions that deliver different levels of performance, especially in terms of available upstream speeds.

Optical fibre rollouts continue in the horizontal portion of the network

For over two years now, the country's leading carriers have been involved in optical fibre rollouts in the horizontal portion of the network, i.e. the portion located on public land. Some 50 towns and metropolitan areas are now concerned by these rollouts.

As part of its "pre-deployment" process, France Telecom is involved in rollouts in the Paris region and in some 10 other cities around the country. Numéricâble, meanwhile, has been replacing some of its coaxial cable with optical fibre in the horizontal portion of the network in roughly 50 towns and metropolitan areas, while SFR and Free's deployments are taking place chiefly in areas where France Telecom and Numéricâble are also present

In all, ARCEP estimates that **more than 4.5 million households** were located in proximity of an optical fibre network as of 30 June 2009.

Alternative carriers performing numerous availability surveys as part of the France Telecom offer for accessing its civil engineering

In accordance with the terms of the ARCEP broadband and ultra-fast broadband market analysis decision that was adopted in July 2008, France Telecom published its first reference offer for providing access to its civil engineering infrastructure on 15 September of that year, which was followed by the release of a second, amended version in April 2009. This second offer opens up new rollout prospects, particularly thanks to the eventual industrialisation of certain processes.

Outside of Paris, where fibre rollouts are performed along sanitation networks, alternative operators' existing FTTx deployments in France Telecom ducts represented around 300 km of optical cables as of 31 December 2008. Since then, alternative carriers have been continuing their rollout efforts and, in the first half of 2009, performed duct availability surveys in new areas. The surveys that are currently underway in **some 20 districts** in the Paris region and around the country's largest metropolitan areas, correspond to **more than 500,000 households to be passed**.

Buildings and households being equipped with optical fibre

As of 30 June 2009, there were over **33,000** buildings equipped with fibre-to-the-home and connected to at least one operator's network, which marks a 60% increase compared to 1 January 2009.

Around 650,000 households are located in these buildings and are now eligible to receive an FTTH service. The number of eligible households has increased by roughly 50% since 1 January 2009.

The number of ultra-fast broadband subscribers is increasing, but only gradually

As of 30 June 2009, there was a total base of more than **230,000** ultra-fast broadband subscribers in France, all operators and all technologies combined, including:

- over **50,000** FTTH subscribers, or **25% more** than in 1 January 2009; and
- roughly **180,000** subscribers to a hybrid fibre-coax solution, marking a **38% increase** compared to 1 January 2009.

Infrastructure sharing still largely confined to buildings located in trial areas

As of 30 June 2009, there were around 200 ultra-fast broadband subscribers whose service was being delivered thanks to a network sharing agreement between their service provider and a competing operator – from among close to 5,000 households located in some 100 buildings equipped with optical fibre and connected to at least two operators' network.

This figure is still very small but is expected to increase significantly following the adoption of the ARCEP decision on the terms and methods for accessing ultra-fast optical fibre electronic communications lines, which is due to occur before the end of the year.

Summary of the main developments since 31 December 2008

	31 December 2008	30 June 2009	Growth since 31 December 2008
Number of fixed ultra-fast broadband subscribers	170,000	230,000	+35%
- of which FTTH subscribers	40,000	50,000	+25%
- of which hybrid fibre-coax subscribers	130,000	180,000	+38%
Subscriptions based on a network sharing agreement	~25	~200	~+700%
Buildings equipped with FTTH	20,500	33,000	+61%
Households eligible to receive FTTH	440,000	650,000	+48%

Elements of international comparison

According to IDATE¹, Asia was by far the world leader in fixed fibre rollouts and adoption levels at the end of 2008: it is home to close to 23 million FTTH or FTTB (fibre to the building) subscribers, well ahead of North America and its 4 million subscribers and Europe with its base of around 1.6 million FTTx customers.

Within the European Union, IDATE reports that France ranked number one in terms of households passed for fixed ultra-fast broadband as of June 2009, and third in terms of actual subscribers, behind Sweden and Italy.

¹ Source: "FTTx Watch Service"

Definitions

Ultra-fast broadband offers: electronic communications offers provided to retail market customers and which include an Internet access service with a peak downstream bitrate of over 50 Mbps and a peak upstream speed of over 5 Mbps. They include two types of offer:

- fibre-to-the-home (FTTH) ultra high-speed offers
- hybrid fibre-coaxial (HFC) ultra high-speed offer

Number of households eligible for fibre-to-the-home (FTTH) ultra-fast broadband offers: number of residential or business units which can subscribe to ultra high-speed commercial offers from at least one Internet service provider based on FTTH (fibre to the home) technology. To avoid double accounting, each operator reports the number of residential or business units in the buildings in which it has installed optical fibre (at least for the core part of the network, as last drop connections to the customer premises can be installed at a later time) and which are connected to an optical fibre network, except for buildings that contain only office space.

Number of households eligible for hybrid fibre-coaxial (HFC) ultra-fast broadband offers: number of individual residential or office units that can subscribe to an ultra-fast broadband commercial offer with at least one Internet service provider, based on a technology which reuses the building's indoor connection to cable networks. To avoid double accounting, each operator reports the number of residential or business units in the buildings in which it has installed coaxial cable or which it manages, and which are connected to an optical fibre network, except for buildings that contain only office space.

Number of buildings equipped with optical fibre and connected by at least one operator: number of buildings in which residential or office units are eligible for fibre-to-the-home (FTTH) ultra-fast broadband offers. To avoid double accounting, each operator reports the number of residential or business units in the buildings in which it has installed optical fibre (at least for the core part of the network, as last drop connections to the customer premises can be installed at a later time) and which are connected to an optical fibre network, except for buildings that contain only office space. This refers only to the number of addresses and not the number of signed agreements, since an agreement with a given property owner can cover several addresses.

Total number of ultra-fast broadband subscriptions: total number of residential or business subscriptions to an ultra-fast broadband offer. This is the number of subscriptions and not the number of subscribers, since a single household can have more than one subscription.

Number of shared ultra-fast broadband subscriptions at the shared access point: number of ultra-fast broadband subscriptions delivered by a service provider accessing a competing operator's network at the shared access point, possibly through a third party – in application of Article L. 34-8-3 of the *Postal and Electronic Communications Code*.

Number of households in buildings equipped with optical fibre and connected by at least two operators: number of households eligible for fibre-to-the-home ultra-fast broadband services (cf. definition above) whose optical fibre lines are connected to at least two operators' ultra fast-broadband networks at the shared access point.