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INTERNATIONAL

# **French regulatory approach for NGA**

## **SEE Regulatory Forum**

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# Situation of broadband in France

(data June 30, 2010 from ARCEP)

27.4m  
households (HH)

75% HH with  
broadband  
(20.4m broadband subscribers)

95% of broadband  
on DSL  
(19.7m)

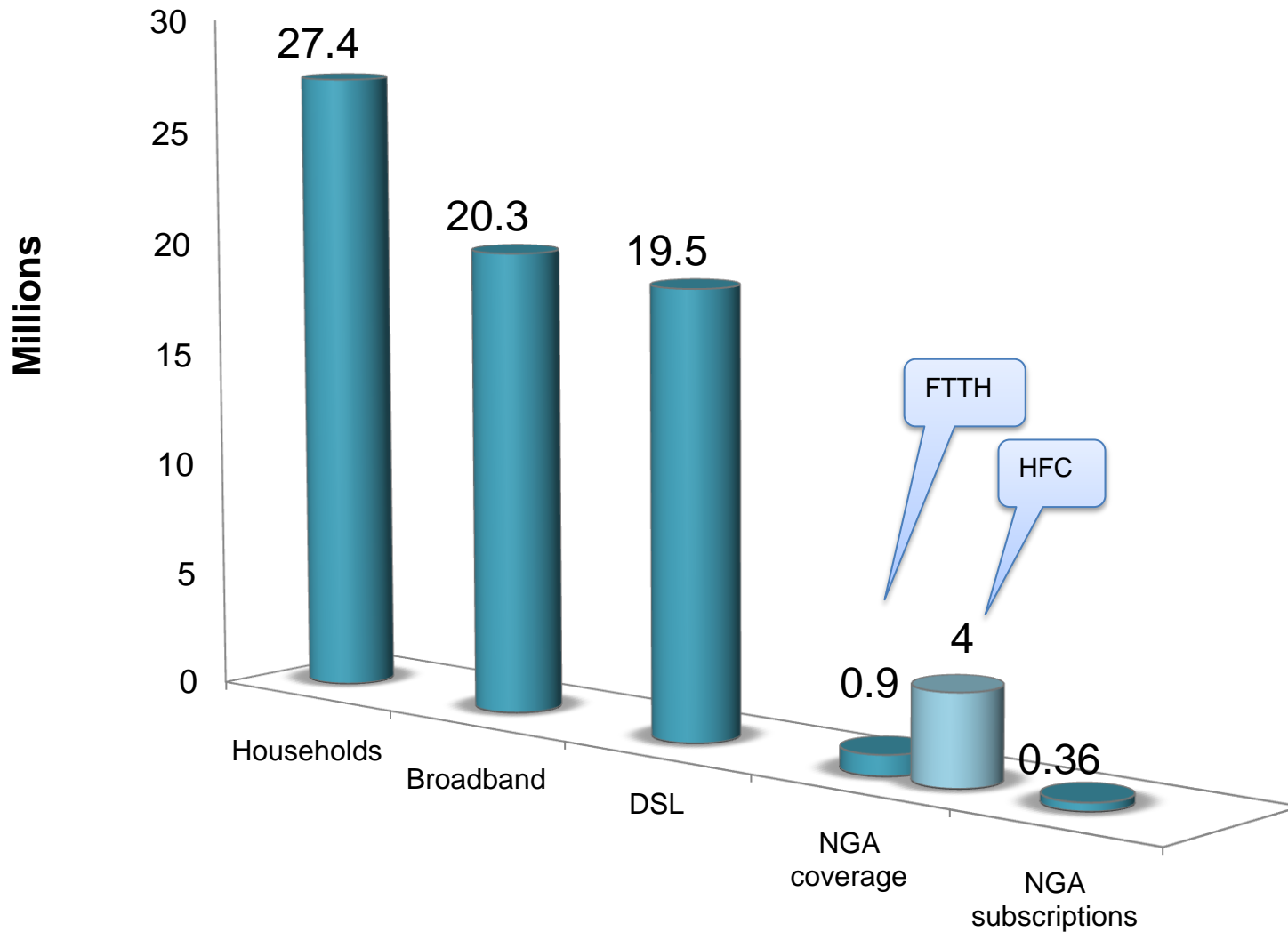
50% of DSL  
broadband based on  
FT's wholesale

2% HH  
covered by FTTH  
15% by upgraded HFC

1% NGA subs  
(90k FTTH, 270k HFC)

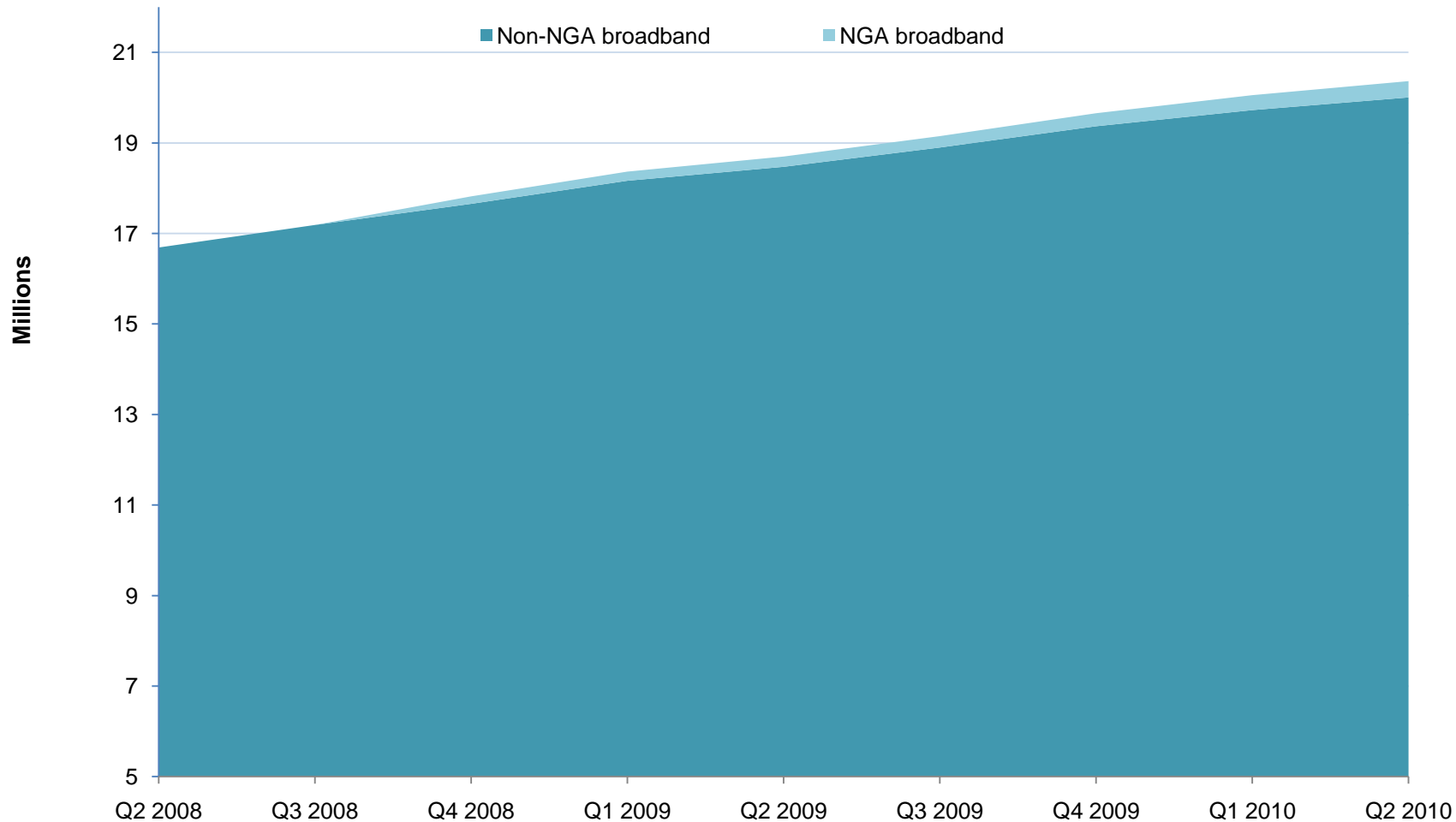
# Situation of broadband in France

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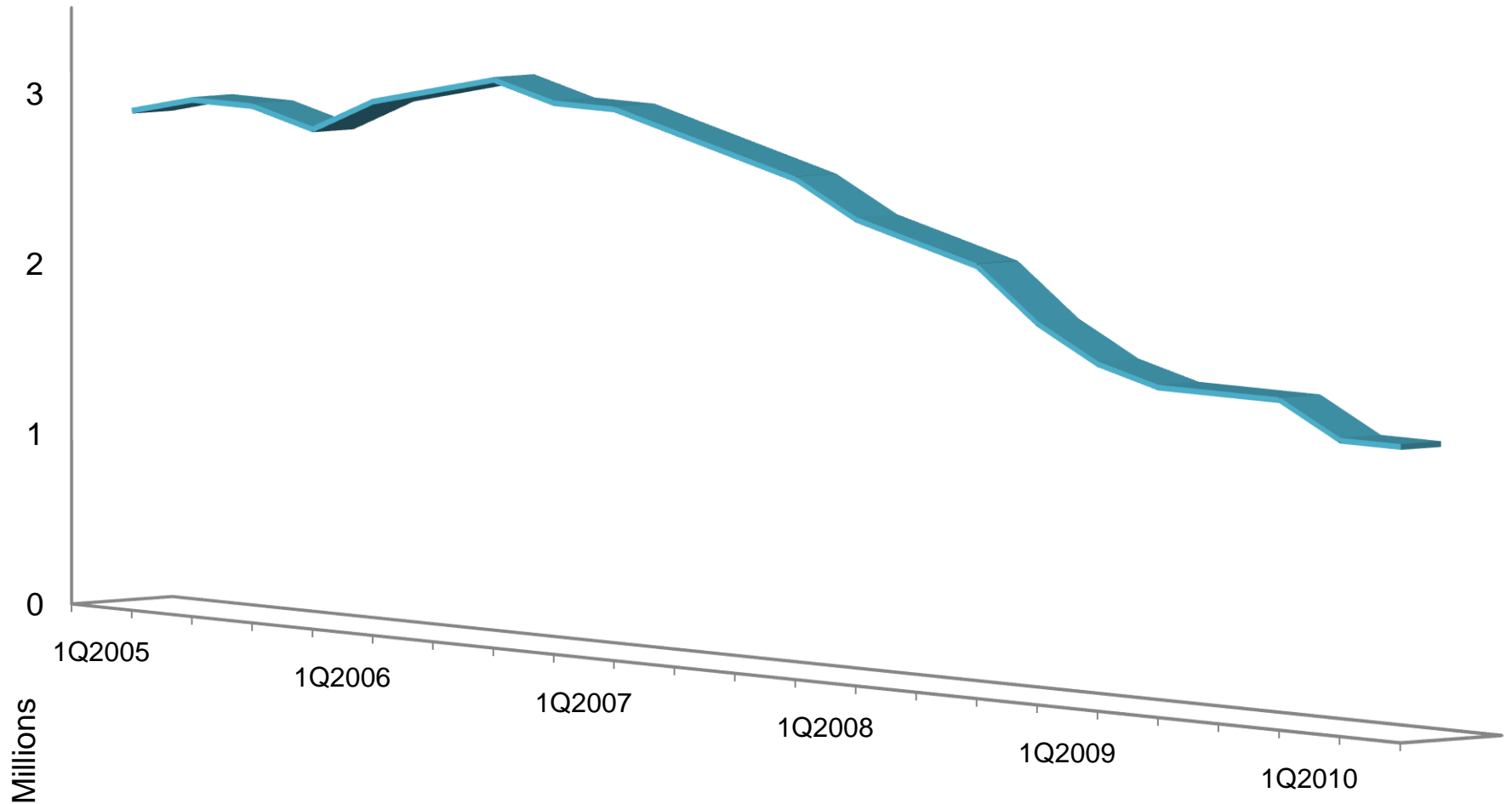


# Situation of broadband in France

Increase of broadband subscriptions since 2008 (incl. NGA)

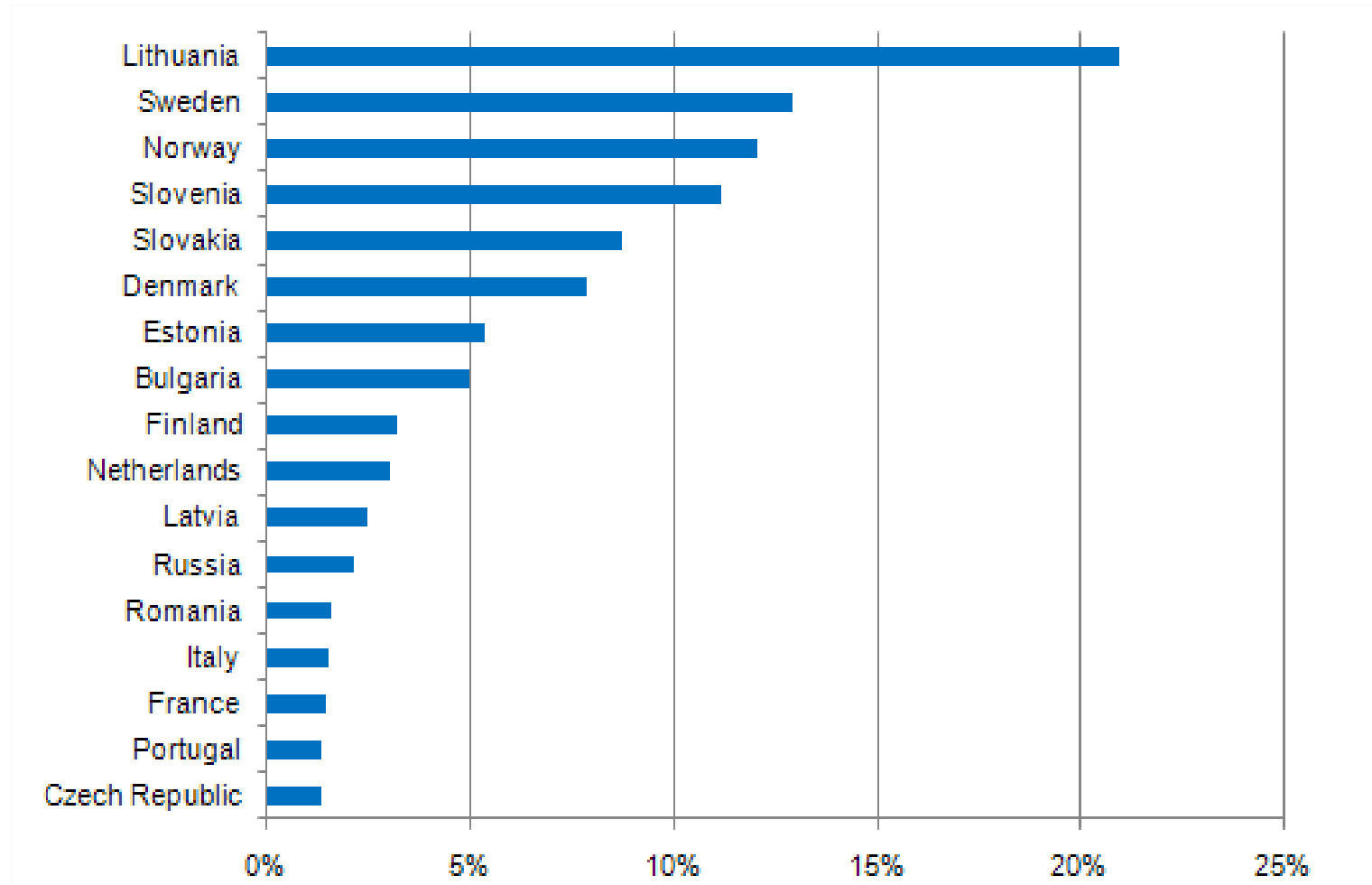


# Annual growth of broadband subs in France

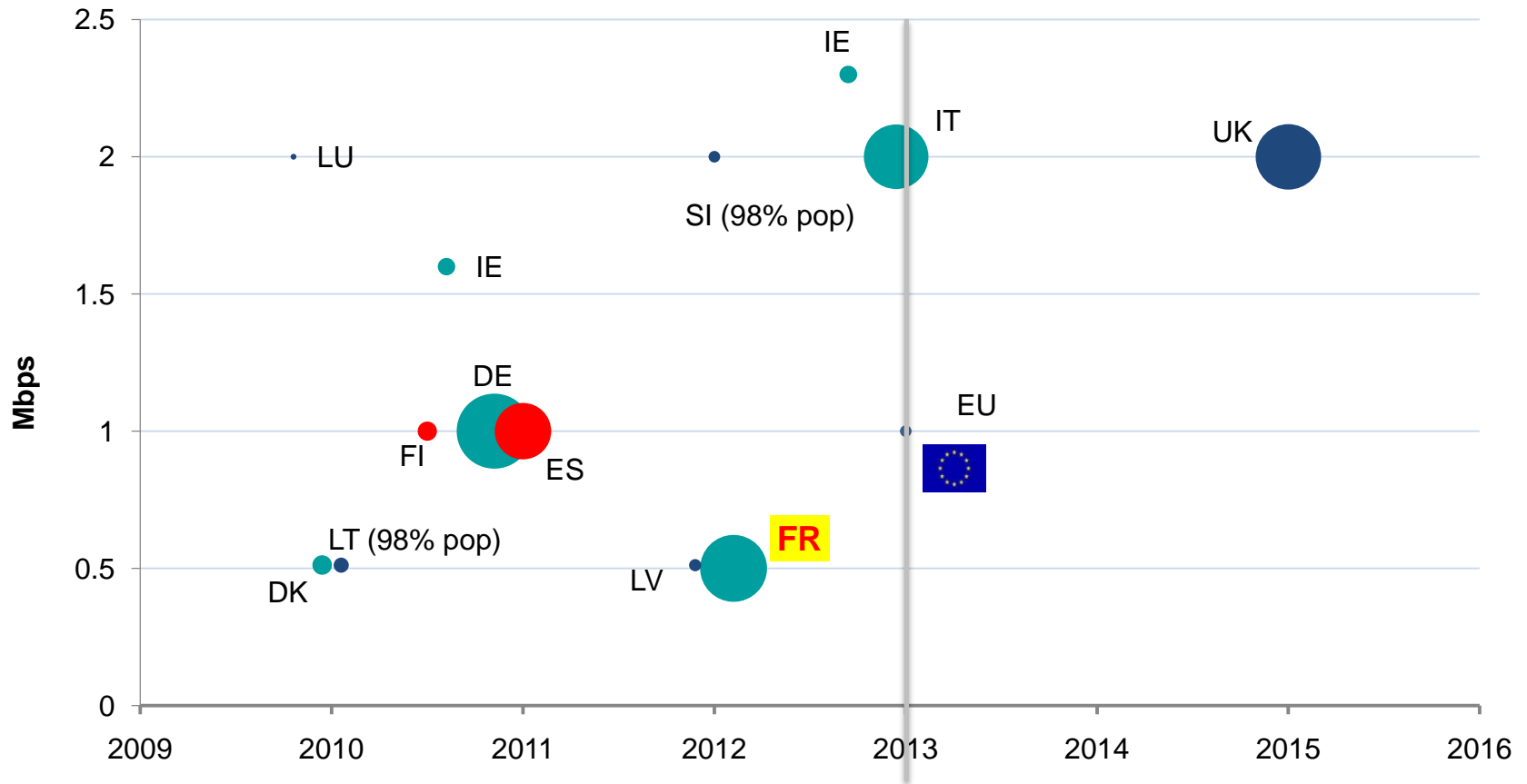


# FTTH/FTTB subscribers in Europe



Source: FTTH Council / IDATE (June 2010)



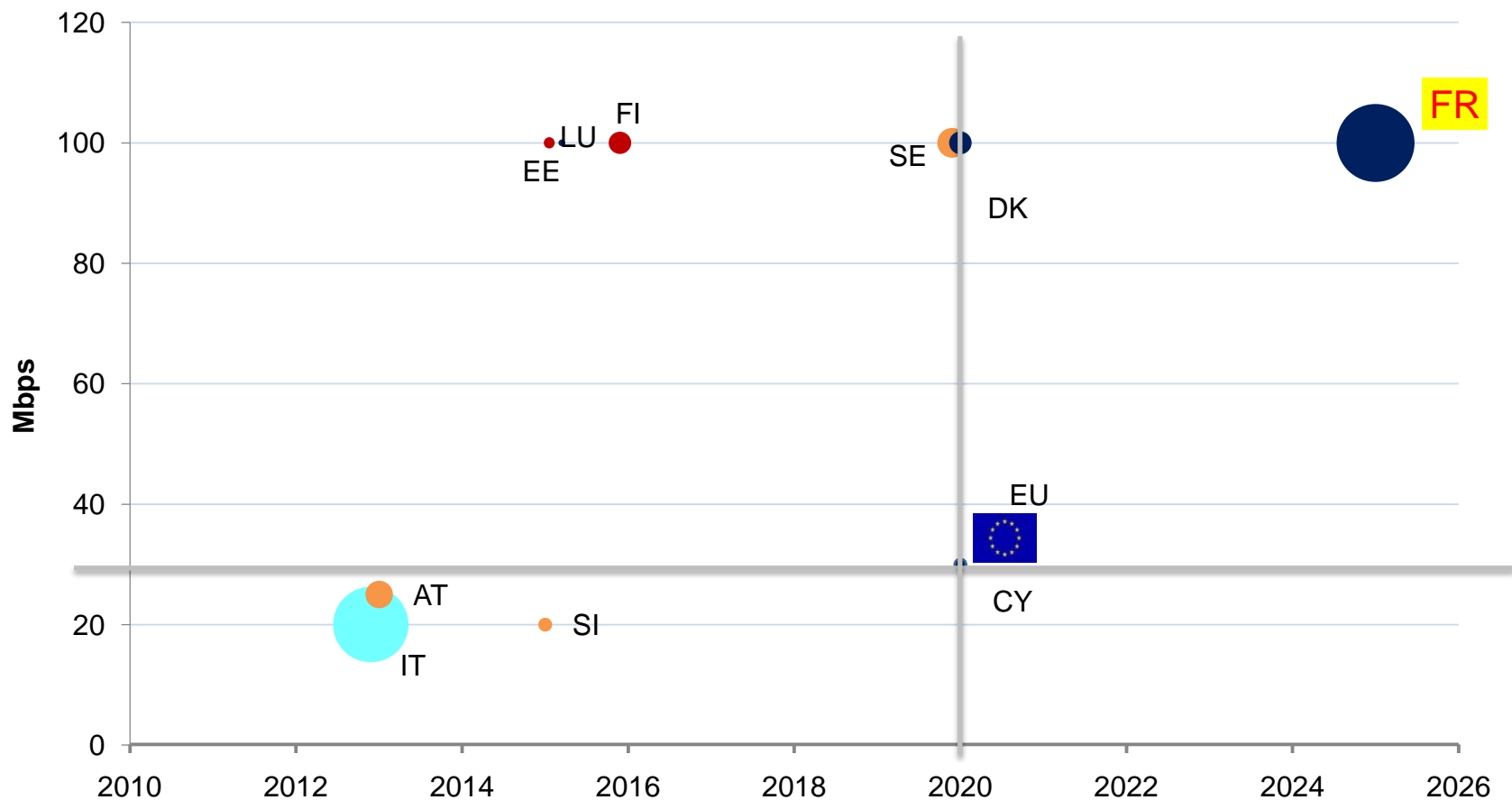
# National targets for full basic broadband coverage



The size of the country circles is weighted by their population size  
Source: CI research

 Political objective  
 Universal Service Obligation (USO)

# Targets for fast/ultra-fast broadband covering at least 90% of population



The size of the country circles is weighted by their population size

Source: CI research

- 100% coverage
- 98/99% coverage
- 95% coverage
- 90% coverage or not clearly defined

## Upgrade of FT's access network

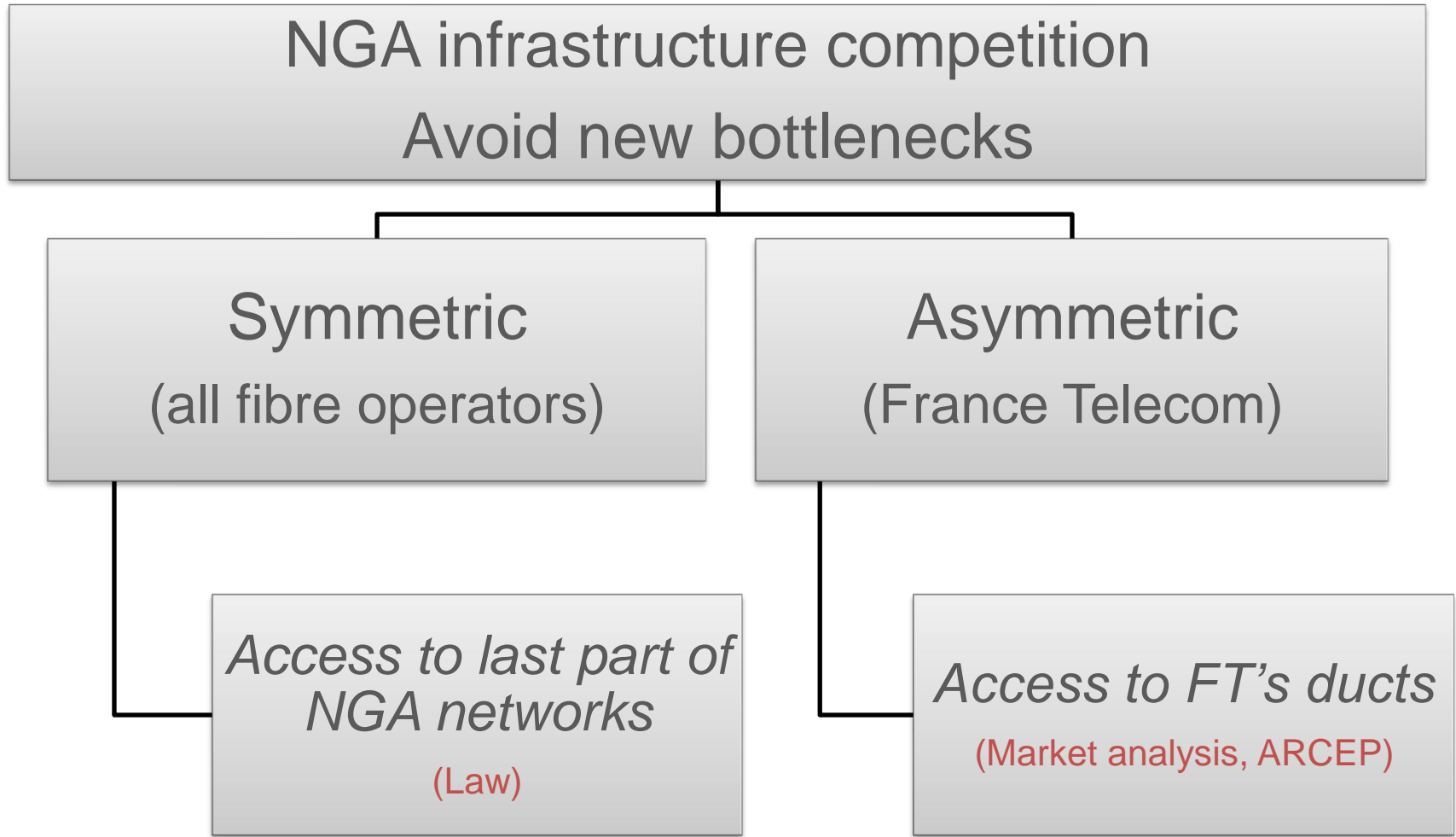
Fibre to customer premises  
(‘Fibre-to-the-home’ – FTTH)

~~Fibre to street cabinets  
(FTTC + VDSL)~~

+ FTTH by alternative operators

+ upgrtaded Hybrid fibre-coax (HFC)

# NGA: twofold regulatory approach



# 1- Asymmetric obligation

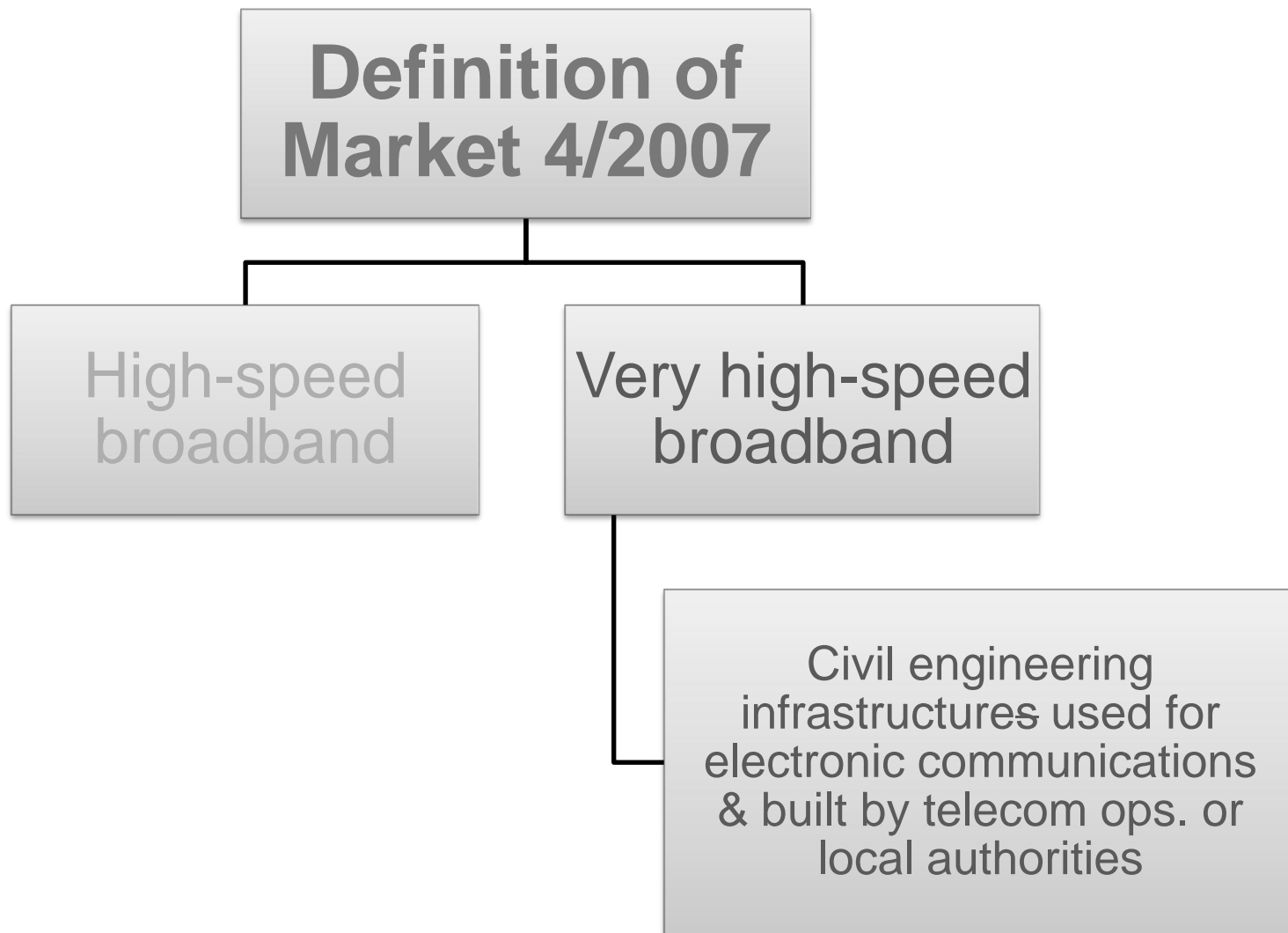
Analysis of market 4/2007

Obligations  
on FT

Obligations  
on fibre Ops.

in densely  
populated  
area

in sparsely  
populated  
area



# 1- Asymmetric obligation

## SMP and obligations

Obligations  
on FT

Obligations  
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in densely  
populated  
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in sparsely  
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area

**FT has SMP with its 350,000 km of ducts**

(numericable: 10,000 km / others: several thousand km)

**Meet all reasonable duct access requests at cost oriented prices**

**+ associated services (map of duct network, technical availability, technical settings)**

**+ de-saturation services**

## 2- Symmetric obligation

For all network operators deploying fibre inside buildings ('building operators')  
→ meet reasonable access requests

Access granted outside the boundary of private property, unless otherwise stated by ARCEP

Technical and financial conditions of the obligation set by ARCEP

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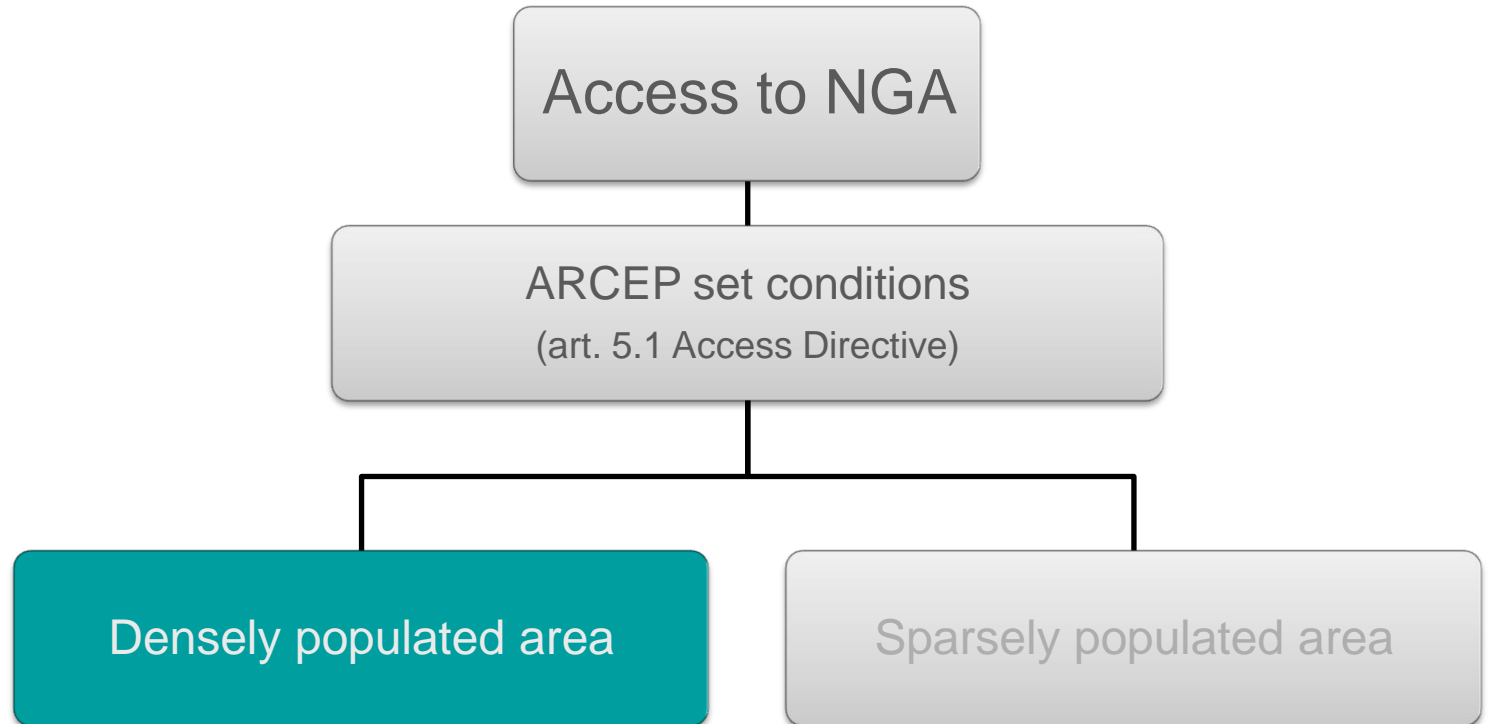
## 2- Symmetric obligation

Obligations  
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Obligations  
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## 2- Symmetric obligation

### Defining densely populated area

Step	Result
<p><b>Step 1</b> Identification of major cities including suburbs (<i>agglomeration</i>) of more than 250,000 inhabitants.</p>	<p>9.13m HH. (24 major cities, including suburbs).</p>
<p><b>Step 2</b> Off the major cities identified, ARCEP selects the ones with <math>\geq 20\%</math> of buildings having <math>\geq 12</math> apartments</p>	<p>8.56m HH. (20 major cities, including suburbs).</p>
<p><b>Step 3</b> ARCEP then selects only the municipalities where: <math>\geq 50\%</math> of buildings have <math>\geq 12</math> apartments, or <math>\geq 1</math> operator has publicly announced to deploy FTTH.</p>	<p><b>5.16m HH</b> (20% of total French HH) with around 3m (60%) households living in buildings of <math>\geq 12</math> apartments</p>

Obligations on FT

Obligations on fibre Ops.

in densely populated area

in sparsely populated area

## 2 - Symmetric obligation

- Before initial deployment all operators are entitled to request the building operator to install one additional dedicated fibre from the access point :
  - › provided the requesting operators bear:
    - the cost of this additional fibre; and
    - part of the common costs for installing the in-building network; and if needed

Obligations  
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Obligations  
on fibre Ops.

in densely  
populated  
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area

## 2 - Symmetric obligation

- Access point inside the building if:
  - › Has at least 12 apartments; or
  - › is connected to accessible sewers regardless of the number of apartments

Obligations  
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Obligations  
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in densely  
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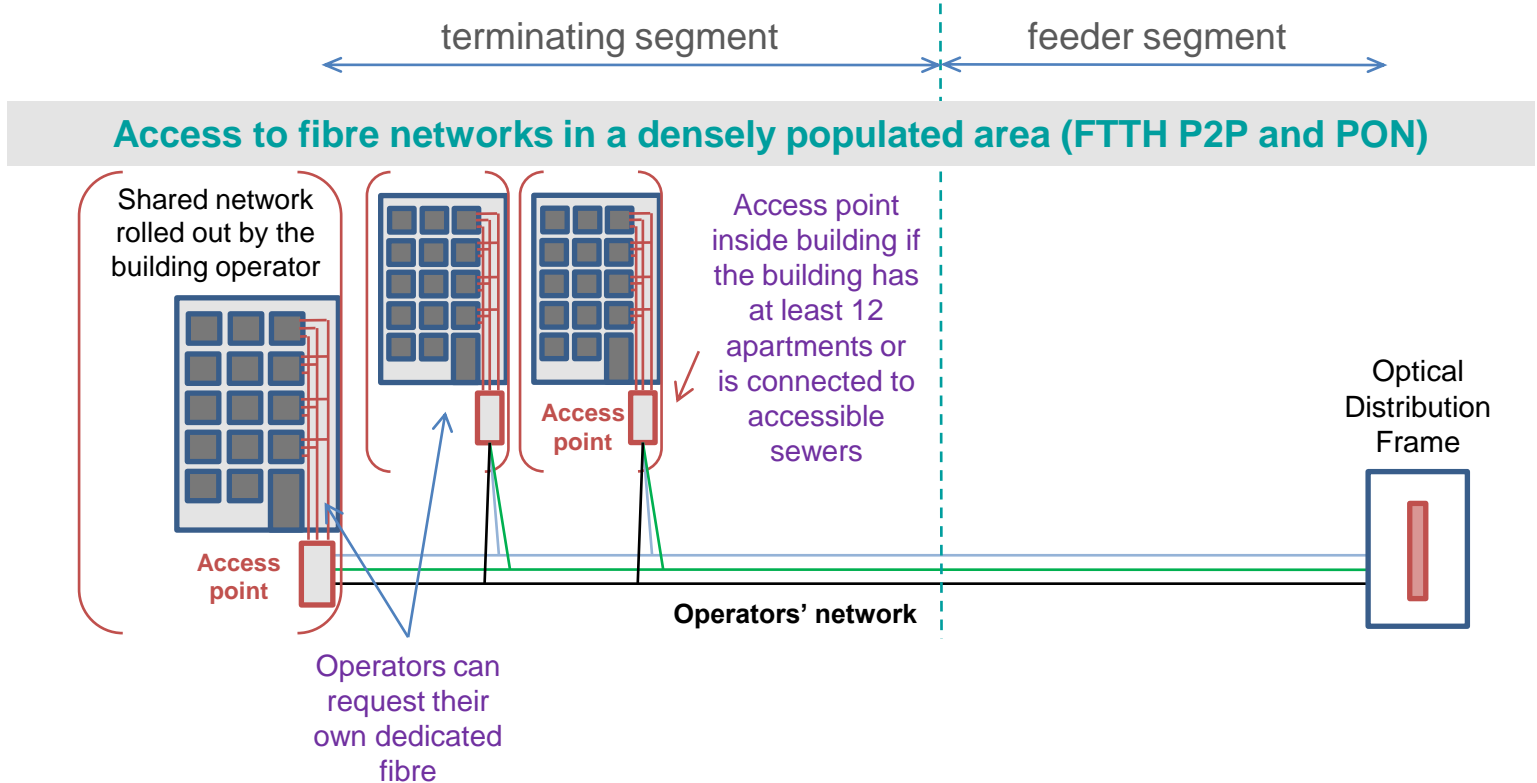
# 2 - Symmetric obligation

Obligations on FT

Obligations on fibre Ops.

in densely populated area

in sparsely populated area



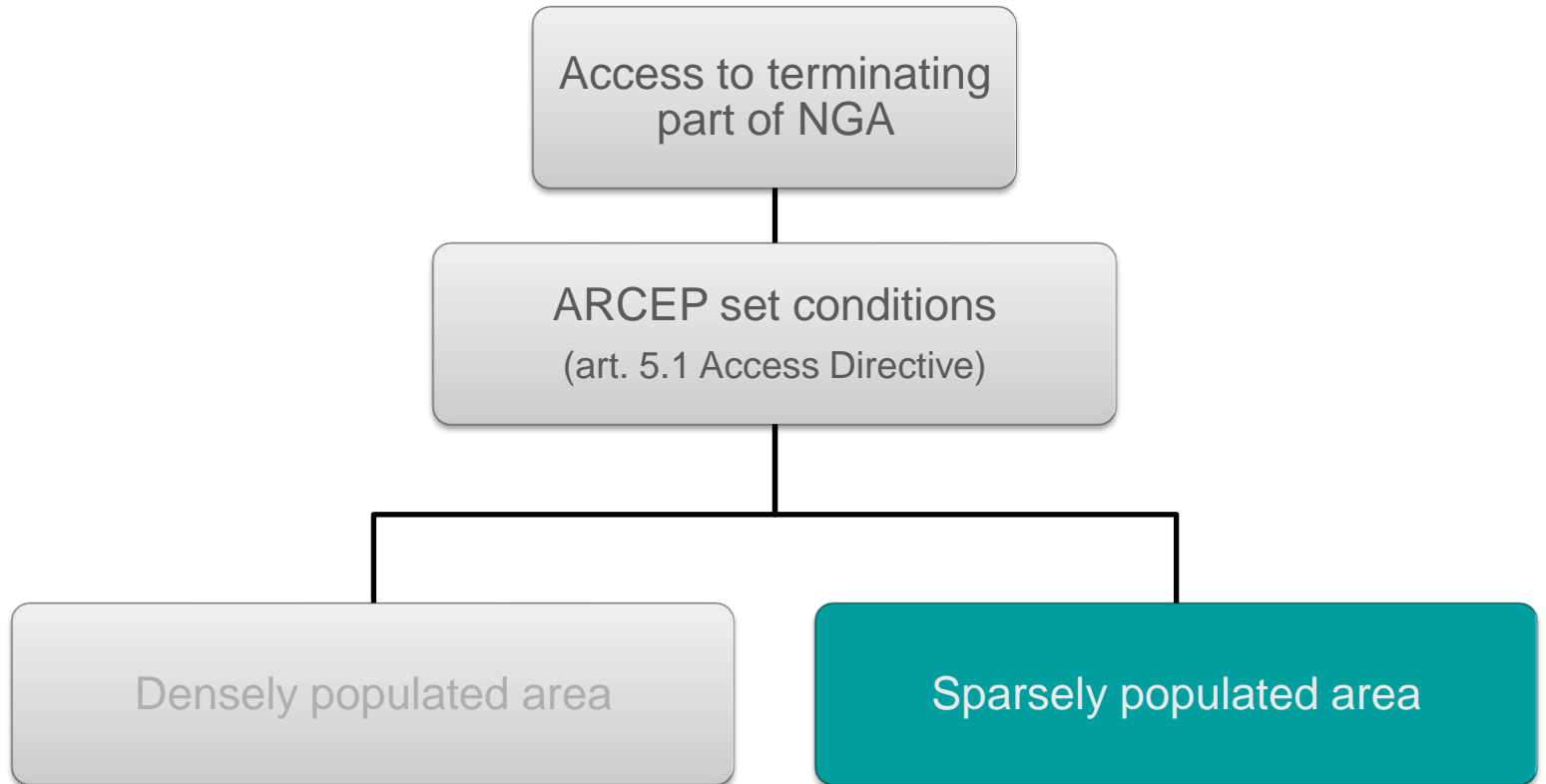
## 2 - Symmetric obligation

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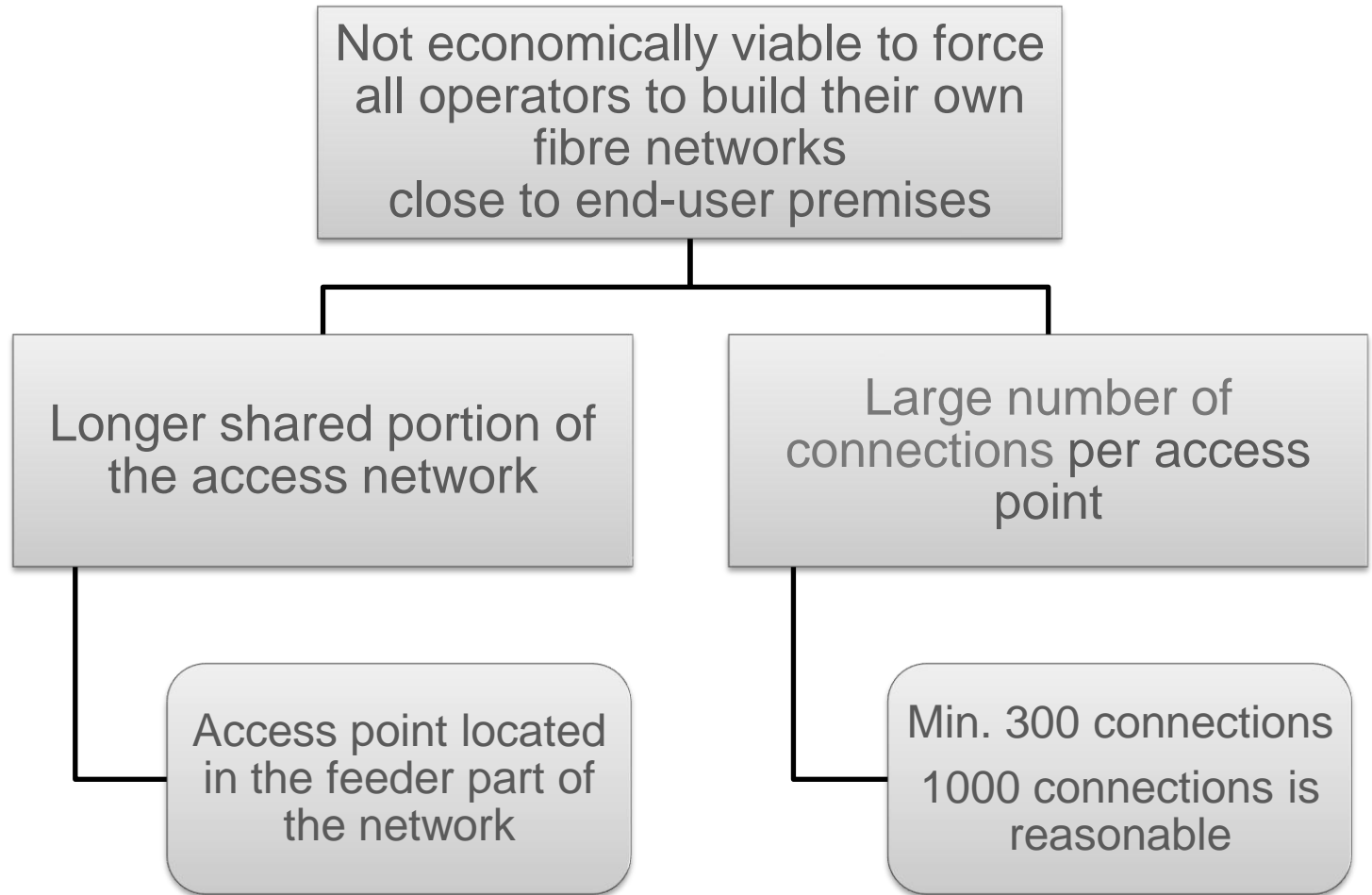
## 2 - Symmetric obligation

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## 2 - Symmetric obligation

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in densely  
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Multi-fibre not  
'mandated' but  
operators free to  
implement it

Should connect  
all buildings in a  
specific area

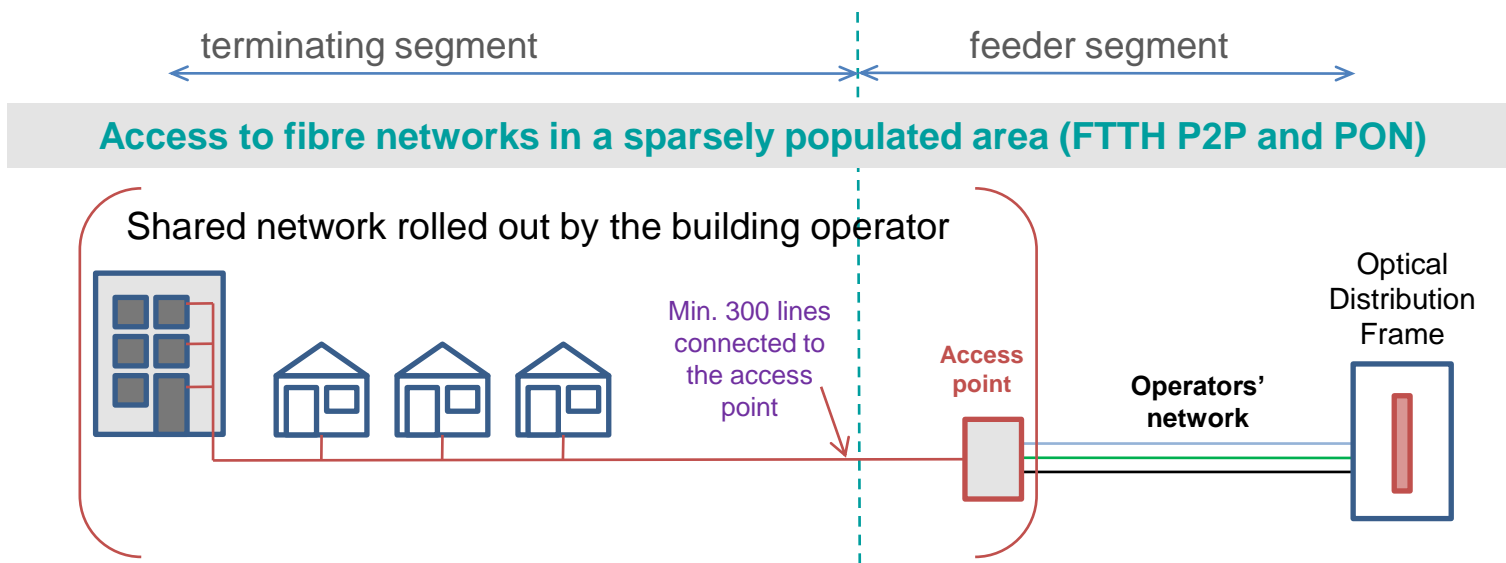
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in densely populated area

in sparsely populated area

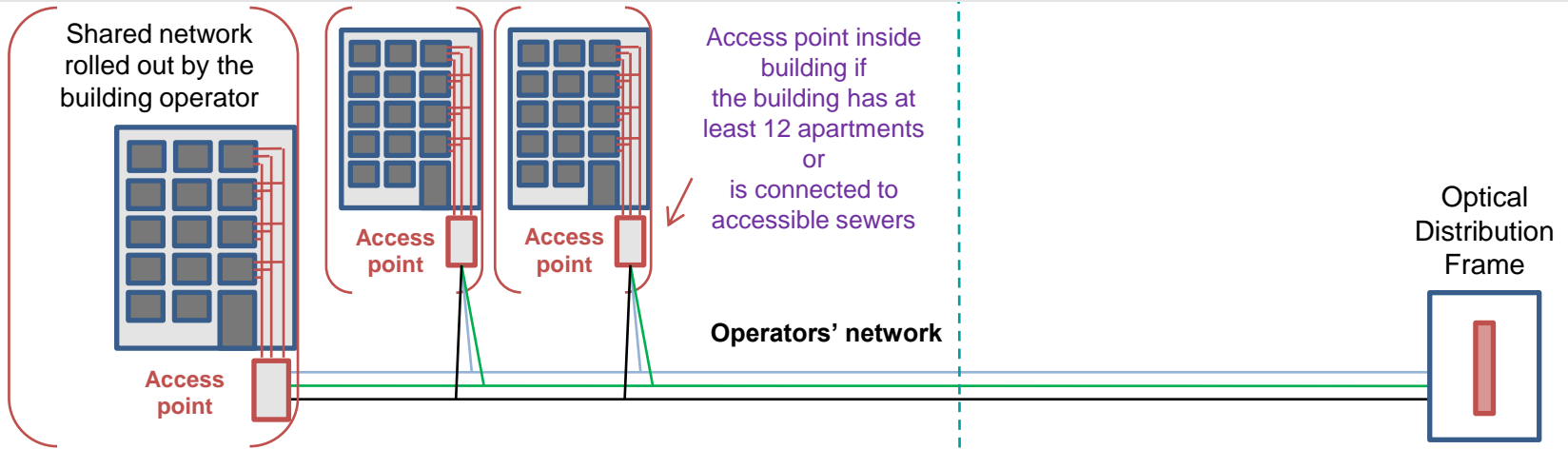


Access to fibre networks in a sparsely populated area (FTTH P2P and PON)

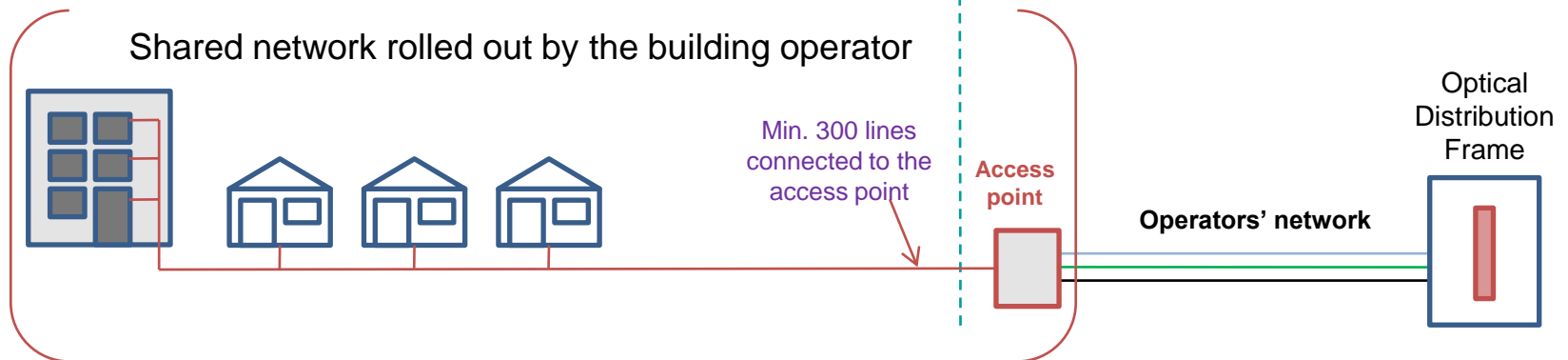
# 2 - Symmetric obligation



## Access to fibre networks in a densely populated area (FTTH P2P and PON)



## Access to fibre networks in a sparsely populated area (FTTH P2P and PON)





**THANK YOU!**

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