

FTTx: global operator rankings

Asian and North American operators lead the pack, with six of them reporting over a million customers

On the whole, the global FTTH/B market continues to make strides. Growth in 2008 was steady, with close to 8 million new subscribers (+37% over the past 12 months) bringing the number of FTTH/B subscribers around the world to just over 29 million at the end of 2008, of which close to 80% are located in Asia.

Asia is the continent with the largest number of FTTH/B subscribers (22.7 million). Among the ten countries with the biggest FTTH/B subscriber bases, five are in Asia (Japan, South Korea, Hong Kong, Taiwan and China), one is in North America and four are in Europe.

Two Asian countries in particular, namely Japan and South Korea, stand out and are rivalled only by the US in terms of users: they are the only three nations with over a million FTTH/B subscribers.

Thanks to its large population, the United States is expected to eventually catch up, especially if we include VDSL systems. According to IDATE, FTTH/B subscribers in the United States will outnumber South Korean subscribers by 2011 – although Asia will remain the biggest market, in large part due to a huge upswing in users in China around 2012.

Table 1: FTTx subscribers in the different geographical zones at the end of 2008

End 2008	VDSL	FTTH/B subscribers	FTTLA subscribers	TOTAL FTTx
Western Europe	776 550	1 512 960	15 000	2 304 510
Eastern & Central Europe	32 000	778 940	212 393	1 023 333
North America	1 045 000	3 995 000	na	5 040 000
Asia**	na*	22 717 500	na	22 717 500
Middle East & Africa	0	15 000	0	15 000
Total	1 853 550	29 019 400	227 393	31 100 343

* In many countries in Asia, VDSL subscribers are included in FTTH/B figures as fibre stops at the basement of the MDUs.

** Not included are FTTx/LAN subscribers in China (17 million at end of 2008).

Source: IDATE and FTTH Council Europe

- **3rd Assises du Très Haut Débit** – 9 June, Paris (Senate)
For the third consecutive year, IDATE is organising a one-day conference devoted ultra-fast broadband, in partnership with Aromates. This year's topic is: "Towards a digital New Deal".
- **FTTx Summit 2009** – 10 June, Munich, Germany
Renewing its partnership with this important event, IDATE will take part in Session 2 at 2 p.m. on the topic of "Market Analysis – Developing accurate cost models for FTTH".

Table 2: 10 largest FTTH/B markets at the end of 2008

Rank	Country	FTTH/B subscribers
1	Japan	14 457 000
2	South Korea	6 758 000
3	USA	3 992 000
4	Hong Kong	645 000
5	Russia	630 000
6	Taiwan	589 000
7	Sweden	401 000
8	Italy	306 500
9	China	229 500
10	France	180 550

Source: IDATE

In terms of operators, the gap between Asia and the rest of the world is still considerable: among the globe's ten largest FTTx operators, six are Asian, two are North American and two are European.

Only six operators in the world have a base of more than a million subscribers, four of which are Asian operators and the other two are based in North America. NTT is the largest FTTx operator with a base of 10.6 million subscribers or a 73% share of the Japanese market and a close to 37% share of the global market.

Table 3: World's top 10 FTTx operators in terms of subscribers at the end of 2008

Rank	Operator	Country	Main Technology & architecture	FTTx subscribers
1	NTT	Japan	FTTH/B GEPON	10 636 000
2	SK Broadband	South Korea	GEPON FTTB GEPON	2 950 000
3	Verizon	USA	FTTH BPON/GPON	2 481 000
3	KT	South Korea	FTTB EPON/GEPON	2 481 000
5	AT&T	USA	VDSL2 FTTN	1 045 000
6	KDDI	Japan	FTTH/B EPON/GEPON	1 025 000
7	Beeline	Russia	Ethernet P2P FTTB	630 000
8	Chunghwa Telecom	Taiwan	FTTB GEPON	577 000
9	HKBN / CTI	Hong Kong	FTTH/B Ethernet P2P/GPON	330 000
10	FastWeb	Italy	Ethernet P2P FTTH/B	285 000

Source: IDATE

Roland Montagne

Head of the Broadband/FTTH Practice, IDATE
r.montagne@idate.org

Romain Berg

Analyst
r.berg@idate.org

Discover IDATE's FTTx Watch Service www.idate-research.com

Specially designed to provide users with a global database of FTTx markets and projects, along with thorough analysis of the issues surrounding this promising market:

- **Database:** a unique and regularly updated database of the markets, broken down by country (45) and technology, along with forecasts for the coming months and years.
- **Insights:** monthly analysis of key issues.
- **Quarterly market updates:** Technologies, operator strategies, business models...