

Fibre to the 5G

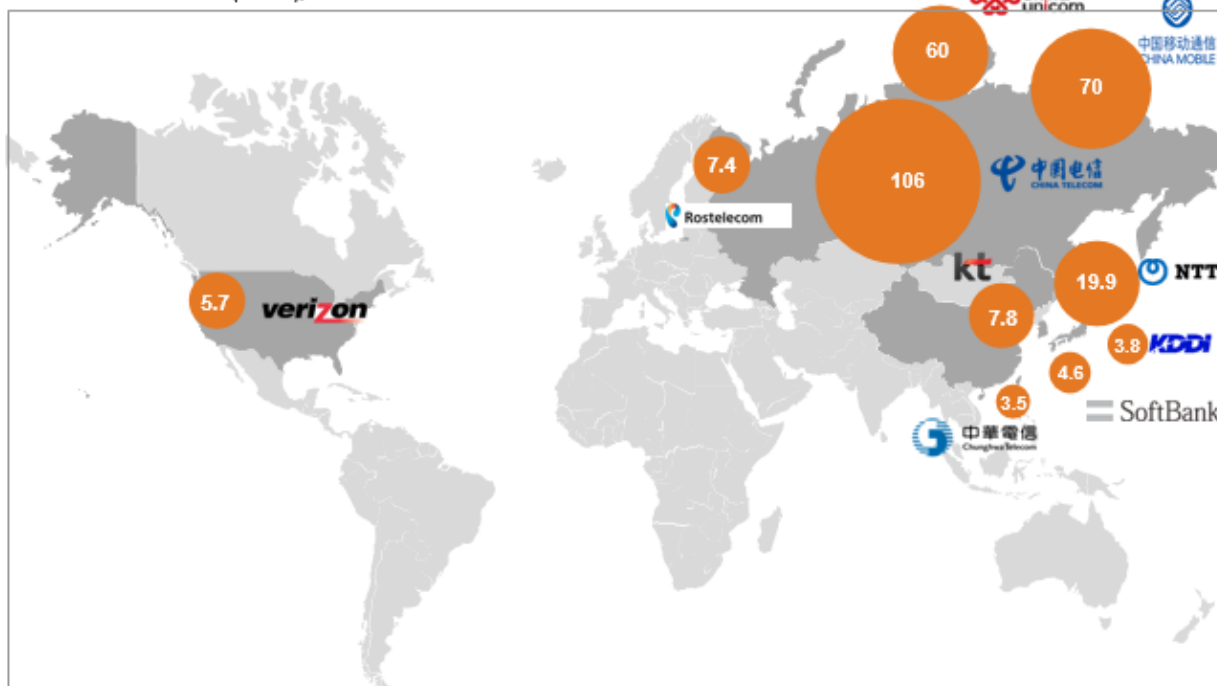
How to Invest in a convergent world?

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15 November 2017

FTTH is progressing ... but not at the same pace everywhere

Worldwide FTTH/B leaders (million), December 2016



Source: IDATE DigiWorld, World FTTH market, August 2017

Top 10 FTTH countries in coverage in Europe

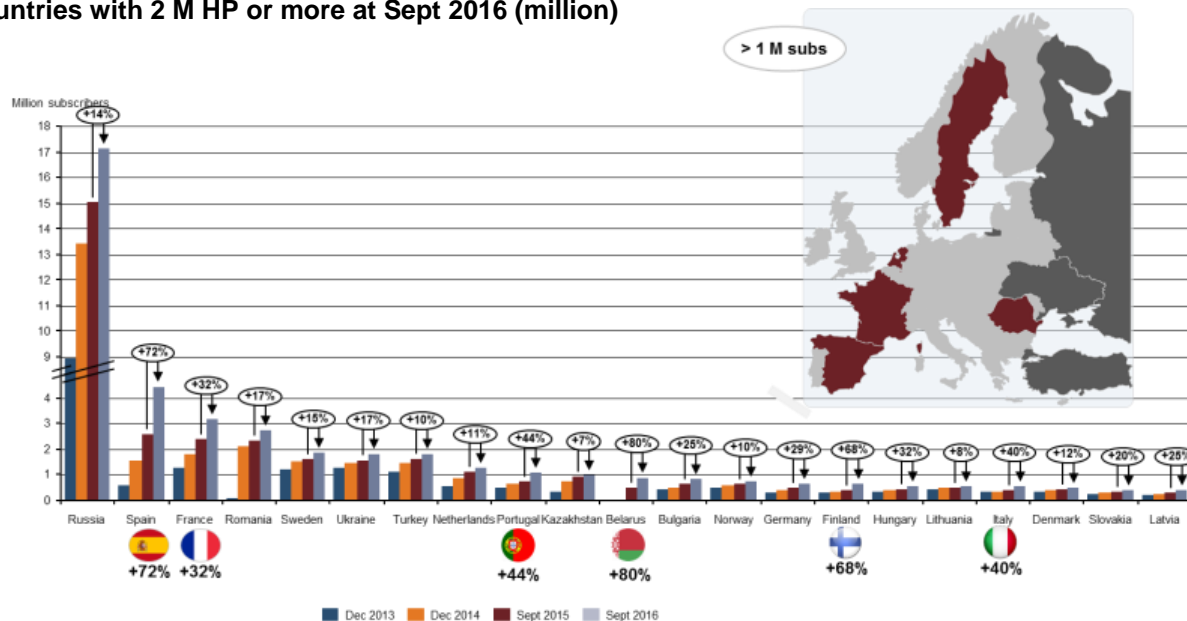


Source: IDATE DigiWorld for FTTH Council Europe, figures as of September 2016

FTTH Subscribers in Europe

- 9 countries with 1 M FTTH/B subscribers or more in EU39 (5 countries in EU28, in red on the map))
- Strong growth in Spain, Belarus, Finland and Portugal
- Dynamism to highlight in France and Italy

Countries with 2 M HP or more at Sept 2016 (million)

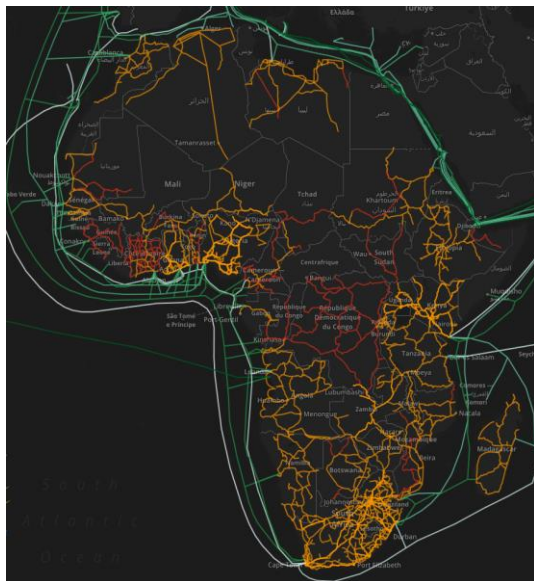


Source: IDATE DigiWorld for FTTH Council Europe

FTTH in Africa: starting

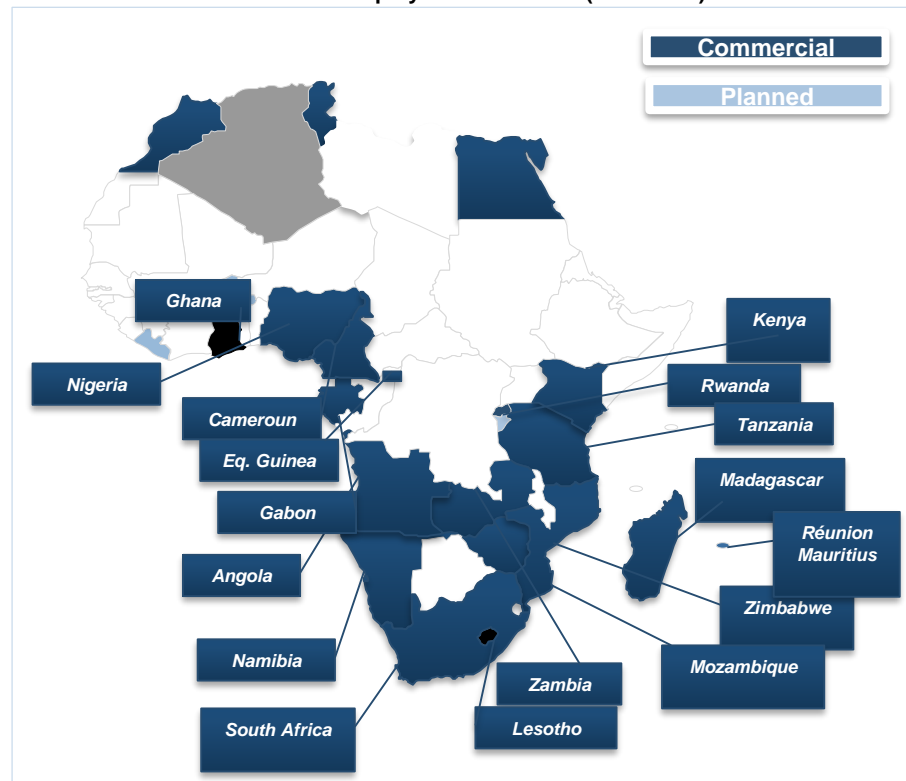
- A **native** FTTH/B market
- But a **good dynamic** with a steady growth in some countries, and commercial launch in about **17 countries in SSA**.

After Submarine cables ...Terrestrial backbones



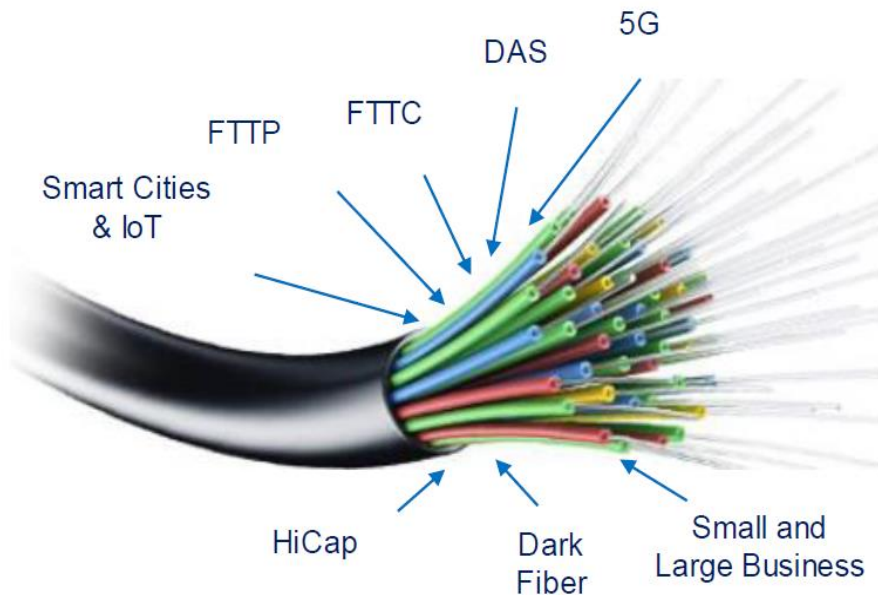
Source : AfTerFibre (African Terrestrial Fiber)

FTTH/B deployments in Africa (June 2017)



Source : IDATE for FTTH Council Africa

Fibre for 5G: leaders already positioned



**Changing to a
holistic multi-use
approach**

Source: Verizon

5G as a new market for Fibre or Fixed Wireless will compete with FTTH?

Indeed is covering non dense areas and the last 10% with FTTH realistic?

- Open Access and Public Funding to leverage Private investments? Co-investment?
- Fixed Wireless or Satellite to deliver several tens of Mbps Waiting for FTTH?

Also FTTH can address different markets

- Residential
- Enterprises with Cloud based services
- Backhaul for 5G numerous cell sites? And competition with 5G Fixed Wireless?