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TITLE: Broadband indicators in France

Broadband indicators in France

12 October 2005

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I – Collection (1/2)

- The market research observatory produces each year, for the electronic communications sector:
 - *four quarterly surveys* (around 100 indicators collected)
 - *one annual survey* (around 500 indicators collected)
- **Objective:** to provide market survey data **at the level of the end customer** in order to ensure transparency of the market for public authorities, analysts and consumers
- **Scope:** operators declared under Article L.33.1, in application of Article L.135 of the Posts and Electronic Communications Code (CPCE)
- Individual data collected by the observatory are for statistical purposes only: **only named officials appointed by the regulatory authority (ARCEP) have access to the information**
- The data are not used by the authority **for performing its regulatory functions**
- **Timetable**

Survey	Dispatch	Reply	Publication
Quarterly	End quarter T	T+40 days	T+4 months
Annual	April year N+1	June year N+1	March year N+2

I – Collection (2/2)

- In the first quarter of 2006, 250 operators were polled
- 51 operators polled in the first quarter of 2006 for broadband indicators on fixed networks.
- Indicators collected in surveying the broadband market quarterly and annually:
 - *Number of subscriptions by access technology*
 - *Revenue by access technology*
- In addition to the quarterly and annual publications, the market research observatory, in its monitoring of broadband services, publishes **the number of broadband subscriptions in France by access technology** 60 days after the end of each quarter.
- Broadband service indicators include only high-speed internet access. No account is taken here of television over IP access or access in respect of corporate data transport services.
- The indicators take in both the individual consumer market and part of the corporate market (SMMs).

II – Definition of indicators

■ Number of broadband internet access subscriptions

Number of subscriptions to broadband internet access services (≥ 128 kbit/s), irrespective of the access network (xDSL lines, cable distribution networks, wireless local loop connections, optical fibre or satellite connections, and WiFi connections), provided to subscribers by the responding operator at the end of the period, including where the subscriptions are included in multi-play packages. Subscriptions sold on the intermediate market (to an access provider) are not counted.

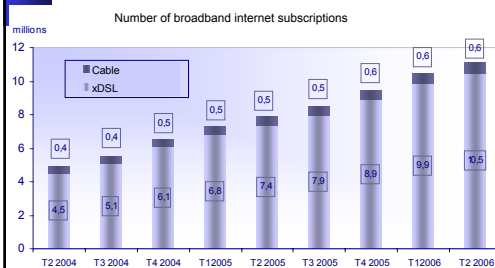
■ Revenues from end-customer broadband internet connections

Revenues from access fees and subscriptions to broadband internet. In the case of multi-play packages, the responding operator will only declare here the revenues associated with broadband internet access. Access revenues include revenues from the actual subscription fees as well as from any options like firewall, anti-virus, anti-spam, storage capacity, etc.

■ Operators break down revenues and numbers of broadband subscriptions by access technology:

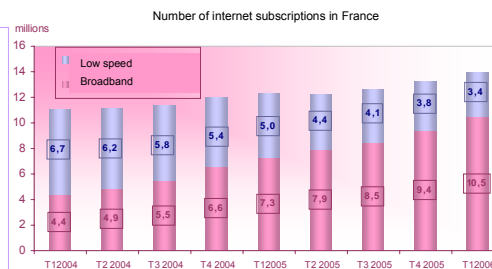
- ✓ DSL
- ✓ Cable
- ✓ Wireless local loop
- ✓ Optical fibre
- ✓ Satellite
- ✓ WiFi

III – Broadband market in France - Number of subscriptions -

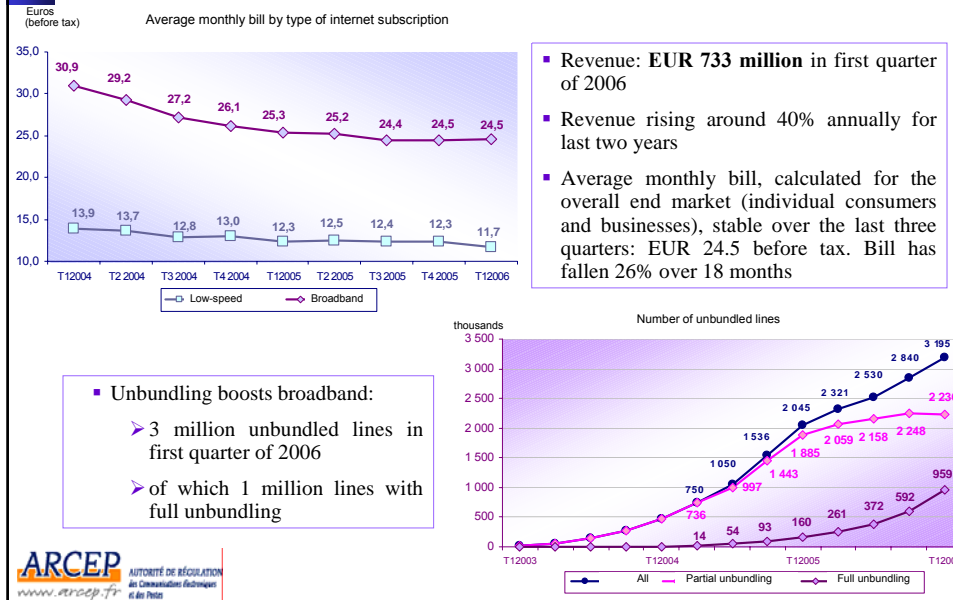


- 11.1 million broadband subscriptions (40.3%)
- 94% xDSL
- 630 000 cable subscriptions
- Other technologies: < 1% of total

- The high growth in broadband subscriptions also reflects **replacement of conventional with broadband**
- Conventional subscriptions have been falling at an annual rate of 30% since end 2004
- Internet:
 - 14 million subscriptions
 - 75% of broadband subscriptions



III – Broadband market in France - Revenues, average monthly bill, unbundling -



Number of broadband mobile subscriptions

- Since the first quarter of 2006, the observatory has started collecting indicators for broadband on mobile networks.
- Two indicators are collected:
 - Number of subscriptions allowing use of multimedia services such as TV (transmission speeds ≥ 50 kilobits per second)
 - Of which, number of 3G subscriptions: number of broadband subscriptions (less terminations) in which the SIM card allows access to the 3G/UMTS network (maximum 384 kbit/s). Subscriptions of customers billed for use of the operator's 3G network are counted.
- Difficulties with broadband mobile indicators:
 - Differentiating 3G/Edge, notion of "broadband", approach by service (data, voice, TV)
 - Difficulties in eliciting responses from operators
- The definitions of indicators will probably evolve in 2007, and the number of indicators will be expanded (to take account, *inter alia*, of data traffic in Mo, volume of 3G communications in minutes, and such like).