Broadband indicators in the EU

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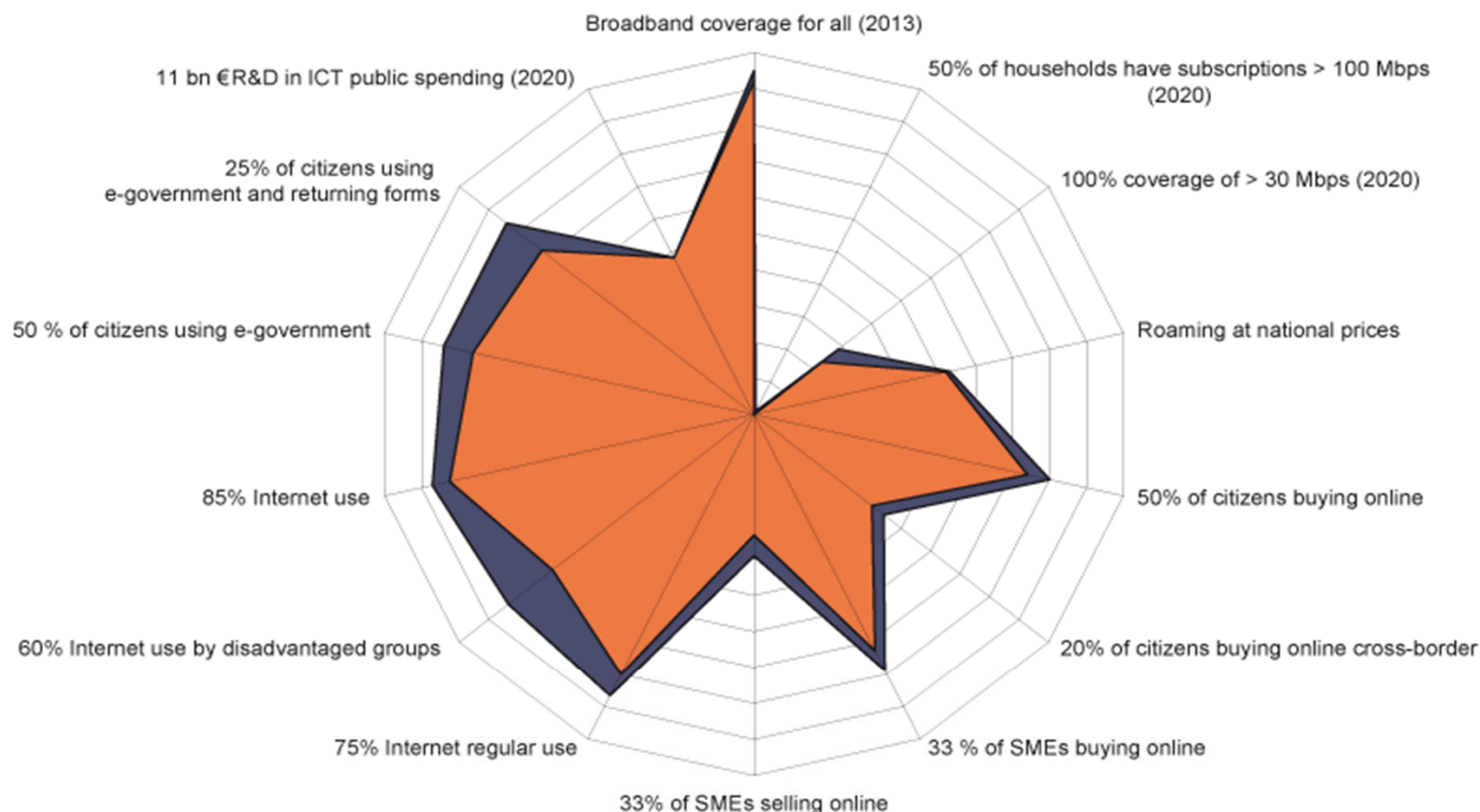European Commission

12 October 2011

How the EU scores on the Digital Agenda targets

Orange = 2010, dark blue = 2011. Labels refer to targets; outerline is 100% achievement; targets refer to 2015 unless otherwise stated. 20% reduction in energy use not included.
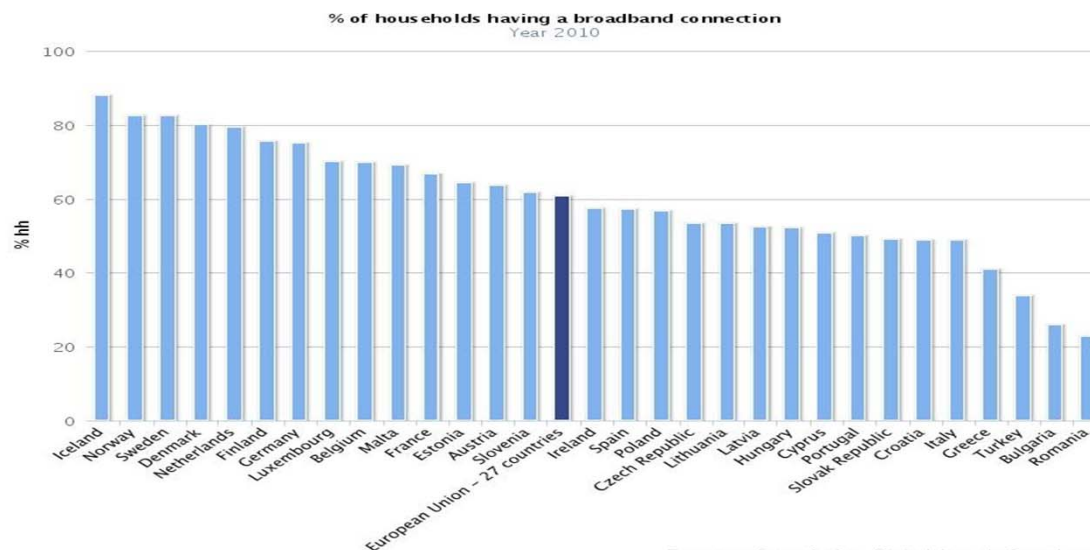
Sources for data collection in the EU

Data collection based on Benchmarking Framework 2011-2015

- NRAs (CoCom)
- Eurostat (user surveys)
- External studies

- Challenges

  – User surveys: sometimes difficult to answer

  – Penetration by HH, business, population: difficult to communicate

  – External studies: validation sought

Fixed broadband penetration, January 2011

% of households having a broadband connection
Year 2010

European Commission, Digital Agenda Scoreboard

Coverage and take-up

- Coverage **(source: external study)**
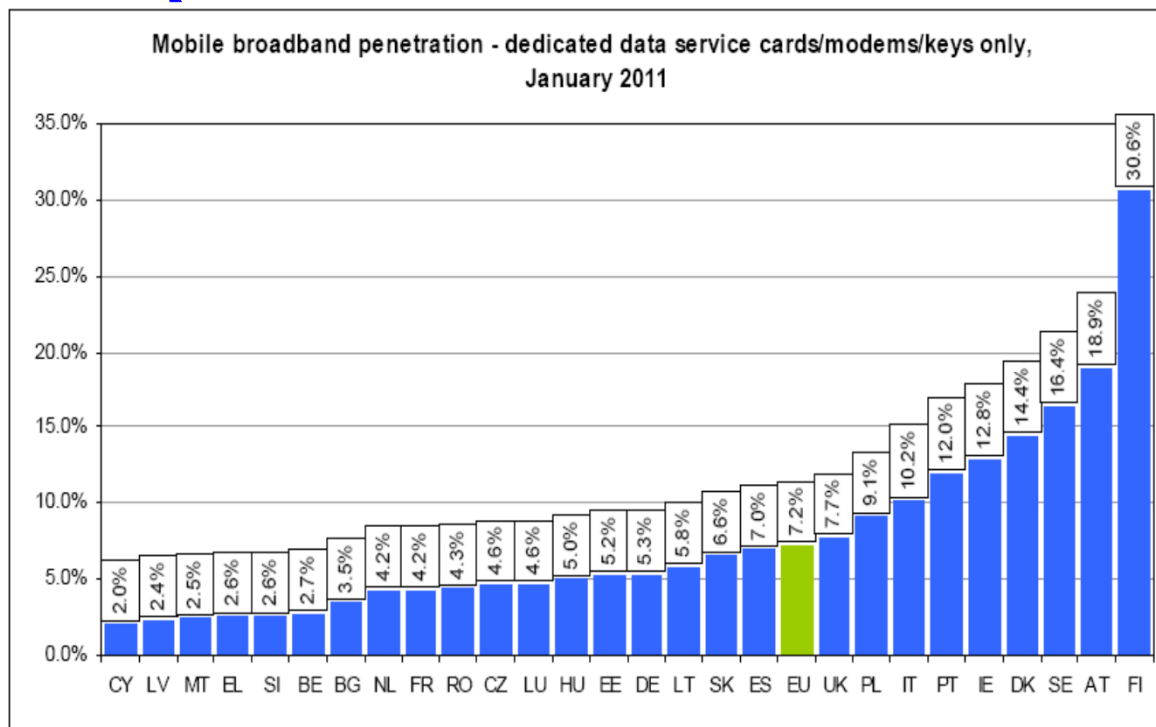 - by technology,
  - by rural-national
- Take-up **(source: own data collection)** twice a year
  - by technology
  - By incumbent-new entrant shares
  - By speed categories
- Challenges
  - NGA take-up: definitions (FTTB, wholesale, etc)
  - NGA coverage (overlapping => infrastructure mapping)
  - Mobile/fixed substitution or complementarity?

Mobile broadband penetration - dedicated data service cards/modems/keys only, January 2011

Country	Penetration
CY	2.0%
LV	2.4%
MT	2.5%
EL	2.6%
SI	2.6%
BE	2.7%
BG	3.5%
NL	4.2%
FR	4.2%
RO	4.3%
CZ	4.6%
LU	4.6%
HU	5.0%
EE	5.2%
DE	5.3%
LT	5.8%
SK	6.6%
ES	7.0%
EU	7.2%
UK	7.7%
PL	9.1%
IT	10.2%
PT	12.0%
IE	12.8%
DK	14.4%
SE	16.4%
AT	18.9%
FI	30.6%

Financial indicators

- **Revenue** (source: own data collection)
  - By fixed/mobile

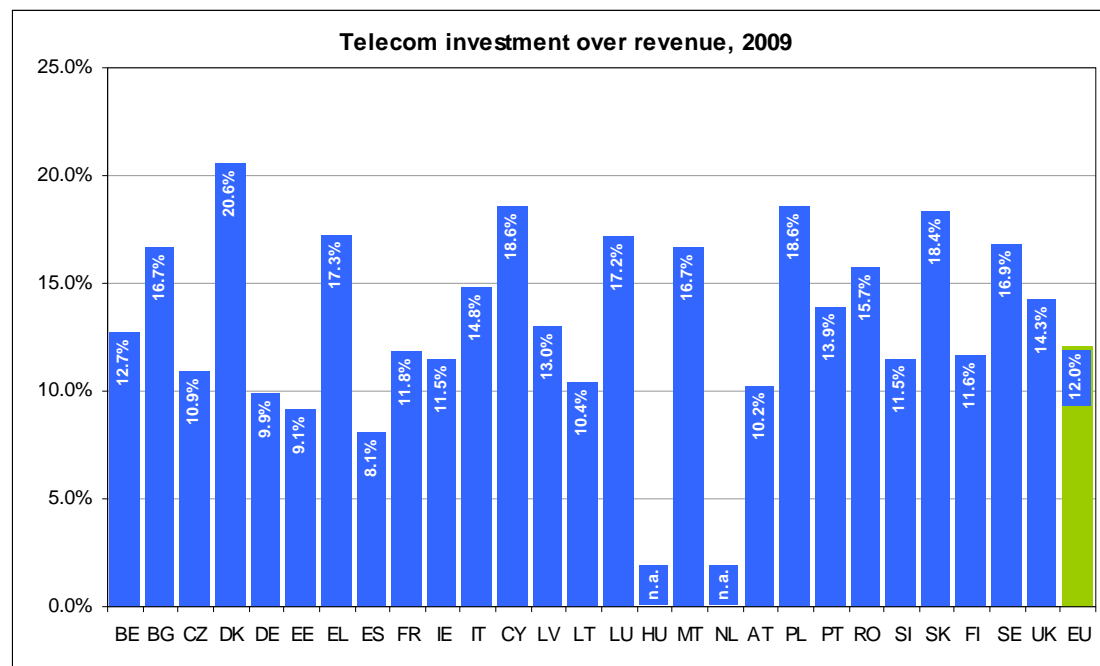- **Network investment** (source: own data collection)
  - by fixed/mobile

- **Challenges**

  (i) Split voice/data: issues of
  - Allocation of bundled services
  - ARPU, APPM, average revenue per GB (traffic), average revenue per Mbit (bandwidth)

  (ii) More reliable figures on NETWORK investment + confidentiality issues

Telecom investment over revenue, 2009

Country	Value
BE	12.7%
BG	16.7%
CZ	10.9%
DK	20.6%
DE	9.9%
EE	9.1%
EL	17.3%
ES	8.1%
FR	11.8%
IE	11.5%
IT	14.8%
CY	18.6%
LV	13.0%
LT	10.4%
LU	17.2%
HU	n.a.
MT	16.7%
NL	n.a.
AT	10.2%
PL	18.6%
PT	13.9%
RO	15.7%
SI	11.5%
SK	18.4%
FI	11.6%
SE	16.9%
UK	14.3%
EU	12.0%

The user perspective

- Actual speed vs. advertised speed (source: study - ongoing)

- Customer satisfaction (source: study)

- Pricing (source: study)

- Challenge
  – further explore the dimensions of customer satisfaction
  – customer choice
  – how to compare prices (incl. bundled services)

Least expensive offer (Incumbents only):
Basket "1024kbps-2048kbps (incl.)", 2GB or 20 hours/month
Total cost/month in €/PPP (VAT incl.)