



European
Commission

Broadband Coverage in Europe 2015

Mapping progress towards the coverage
objectives of the Digital Agenda

EXECUTIVE SUMMARY (EN)

A study prepared for the European Commission
DG Communications Networks, Content and Technology
by:



This study was carried out for the European Commission by



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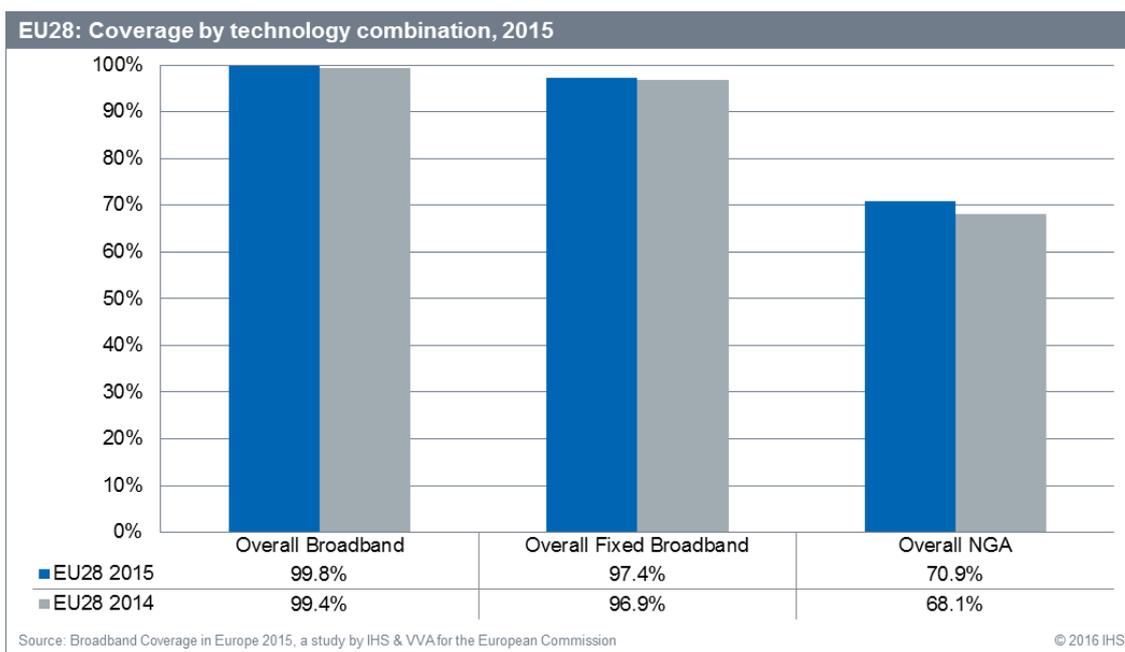
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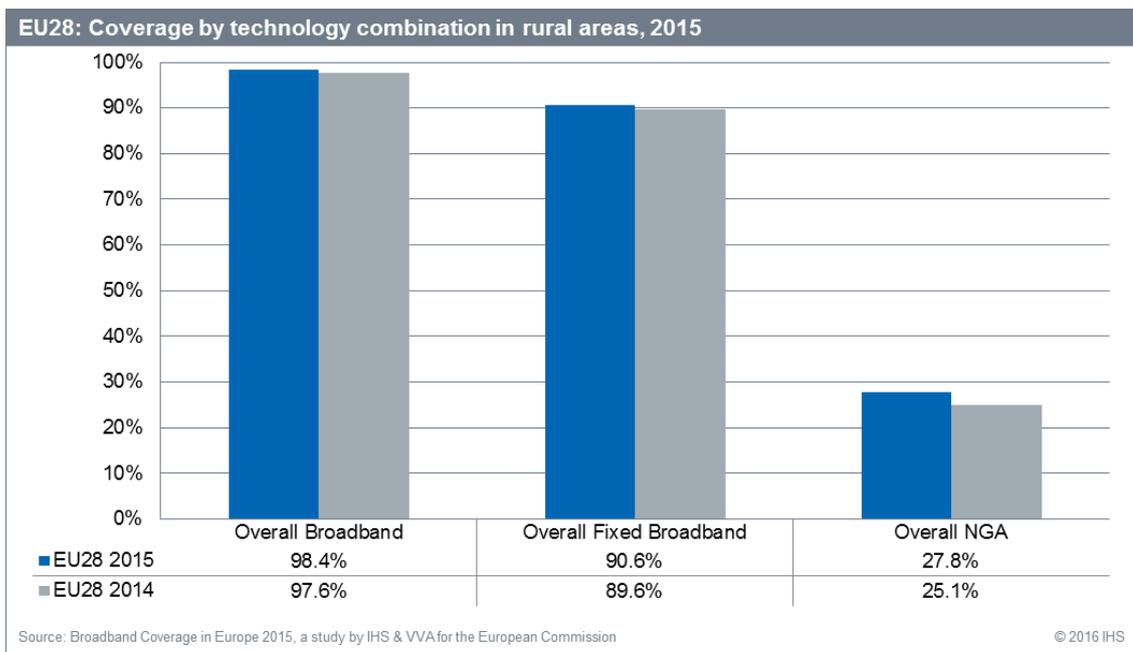
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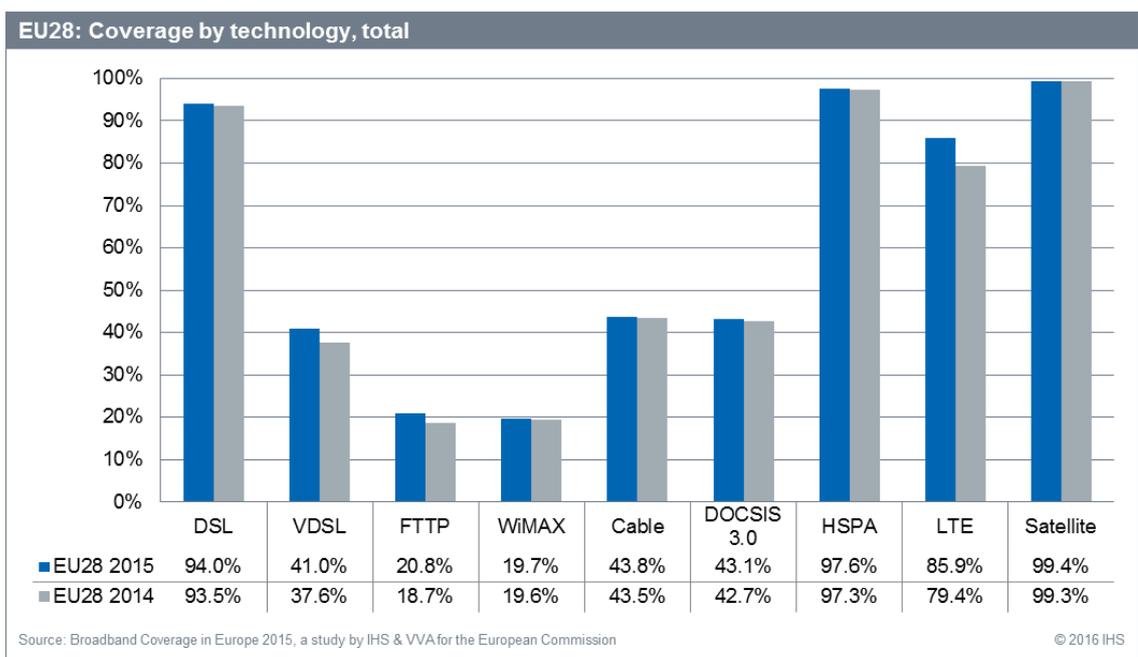
- The Broadband Coverage in Europe study is designed to monitor the progress of EU Member States toward their specific broadband coverage objectives – namely: ‘Universal Broadband Coverage with speeds at least 30 Mbps by 2020’ and ‘Broadband Coverage of 50% of households with speeds at least 100 Mbps by 2020’.
- In 2013, DG Connect selected the consortium of IHS & VVA to run the project. IHS & VVA surveyed NRAs and telecommunications groups across each participating state to compile the requisite information, with the first annual report published in 2014 and second report following in 2015. This document builds on the previous reports and where possible IHS & VVA adopted similar data collection and analysis methods to those implemented by the previous contractor, Point Topic, in the period 2010-2012. This was done in order to ensure comparability of datasets for the purposes of time-series assessment.
- The timeline of the data collection for the 2015 edition of the BCE study has been moved forward in order to align reporting of the broadband coverage data with the publications of the Digital Economy and Society Index and the European Semester related country assessments. For this reason, the collected data reflects the situation at the end of June 2015 compared to the end-of-year data (i.e. end of December) collected in previous years.
- This report covers 31 countries across Europe – the EU28, plus Norway, Iceland and Switzerland, and analyses the availability of nine broadband technologies (DSL, VDSL, cable modem, DOCSIS 3.0, FTTP, WiMAX, HSPA, LTE and satellite) across each market, at national and rural levels. In addition, three combination categories indicating the availability of one or more forms of broadband coverage are also published. These cover overall fixed and mobile broadband availability, fixed broadband availability and next generation access (NGA) availability.



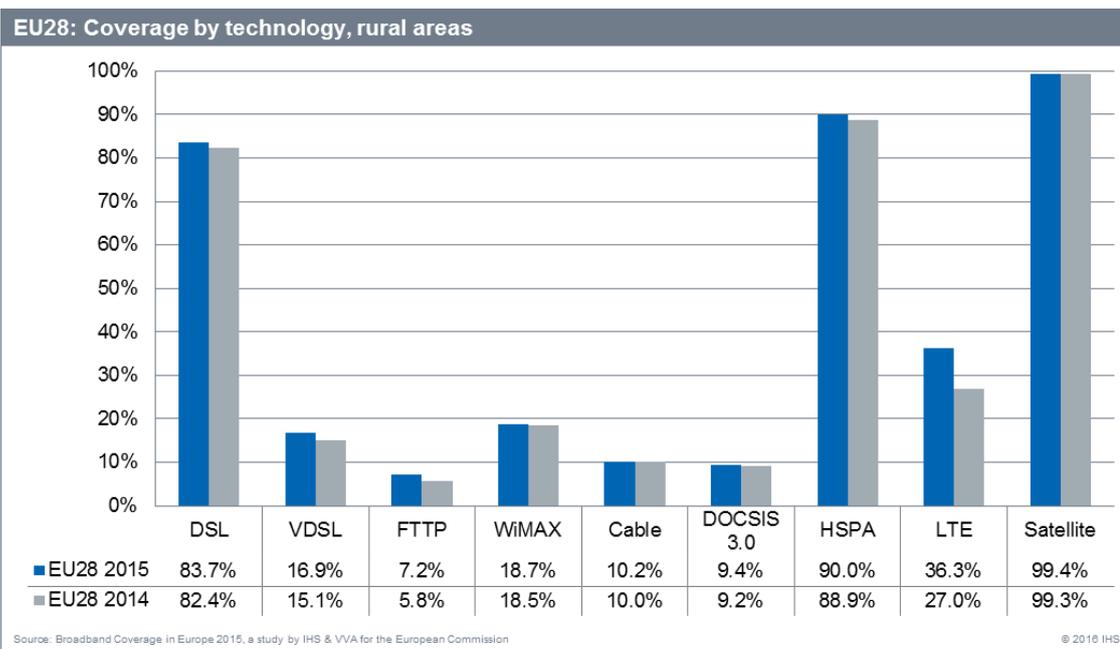
- The collected data show that over 217 million EU households (99.8%) had access to at least one of the main fixed or mobile broadband access technologies at the end of June 2015 (excluding satellite). This represents a 0.4 percentage point increase, or 660,000 additional households compared to the end of 2014.
- The overall fixed broadband coverage mirrored the increase in overall broadband coverage, rising from 96.9% in 2014 to 97.4% by mid-2015, representing an additional 870,000 EU 28 households gaining access to fixed broadband.
- Coverage by next generation access services (VDSL, DOCSIS 3.0 and FTTP) continued its increase observed in the previous years, increasing by 2.8 percentage points compared to 2014 to reach 70.9% EU households in the first half of 2015. This increase equals to 6 million new households, with almost 155 million households in the EU in total having access to next generation broadband by mid-2015.
- Rural broadband coverage continued to lag behind national coverage across the EU28. By mid-2015, 98.4% of rural households were covered by at least one broadband technology, but only 27.8% of rural households had access to next generation services.



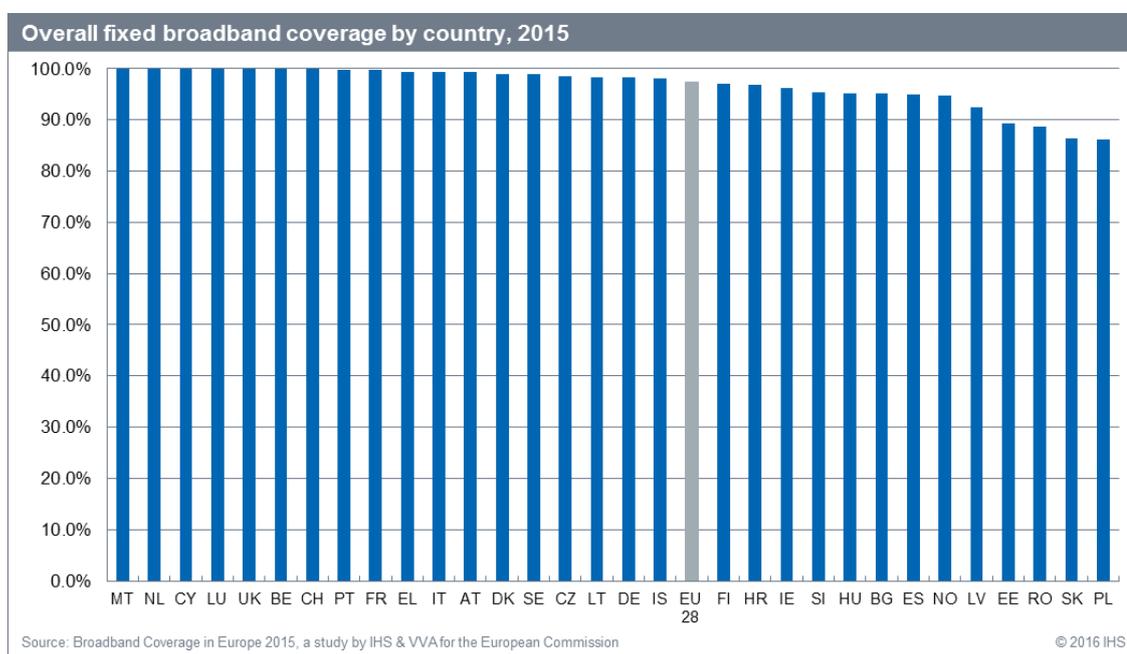
- As in previous years, satellite broadband remained the most pervasive technology in Europe in terms of overall coverage. However, satellite coverage is still limited in the Baltic countries and is absent in Iceland.
- DSL was the most widespread fixed access technology, covering 94.0% of EU households (up from 93.5% in 2014). It is followed by cable, with household coverage of 43.8% (up from 43.5% in 2014). WiMAX coverage was 19.7% in mid-2015 compared to 19.6% at the end of the previous year.
- VDSL remained the fastest-growing NGA technology, with coverage increasing by 3.4 percentage points to reach 41% EU households during the first six months of 2015. VDSL therefore remains the key driver of NGA coverage growth.



- FTTP and DOCSIS 3.0 coverage increased at a slower rate than VDSL, with coverage increasing by 2.1 and 0.5 percentage points respectively. In mid-2015, 20.8% of EU households had access to FTTP connections, while DOCSIS 3.0 cable networks passed 43.1% of homes.
- Examining mobile broadband technologies, HSPA networks covered 97.6% of EU households, which represents a slight increase compared to 2014, when HSPA reached 97.3% households. As of mid-2015, all Member States had LTE-capable networks, with LTE coverage rising by 6.5 percentage points to 85.9%. This also means that LTE remains the fastest growing broadband access technology in terms of coverage.
- Rural broadband coverage remained considerably lower than total coverage. Fixed broadband coverage in rural areas continued to lag behind national coverage by almost seven percentage points (90.6% coverage at rural level, compared to 97.4% total coverage). The gap was much larger for NGA technologies, with 27.8% coverage versus 70.9%).
- As in the previous year, the biggest improvements in rural fixed broadband coverage were reported for VDSL, where coverage increased by 1.8 percentage points to 16.9%. This shows that continued efforts are made by governments and operators to upgrade existing DSL networks and improve rural households' access to NGA technologies.
- HSPA coverage increased by 1.1 percentage points in rural areas in the first six months of 2015, reaching 90% of rural households. LTE recorded the largest coverage increase in rural areas during the first half of 2015, with coverage increasing by 9.3 percentage points to 36.3%.

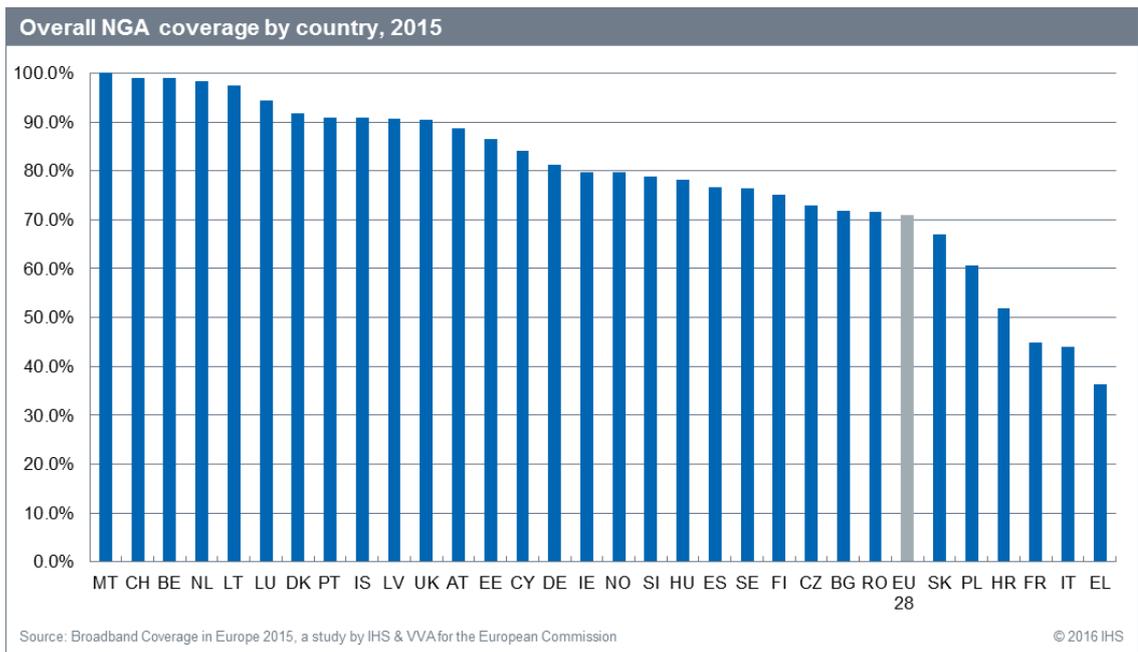


- Out of the 31 study countries, 18 countries had fixed broadband coverage levels at or above the EU28 average of 97.4%. As in 2014, fixed broadband coverage was highest in Cyprus, Luxembourg, Malta, the Netherlands and the United Kingdom where it covered 100% of households. Only four countries reported coverage levels below 90%. These countries were the same as in the previous year and included Estonia, Romania, Slovakia and Poland.



- Malta remained the only country to report complete coverage for NGA technologies. Switzerland, Belgium, the Netherlands, and Lithuania were the only four countries where NGA coverage exceeded 95%.
- Out of the 31 study countries, 25 countries performed above the European average (70.9%) with regards to NGA availability. France, Italy and Greece continued to be

the only three countries with NGA coverage under 50%. As in 2014, Greece reported the lowest NGA coverage, with only 36.3% of homes passed by NGA networks.



- Almost all of the countries in this study reported HSPA coverage levels above 95%, with Ireland, Slovakia and Germany being the exceptions (at 94.6%, 91.8% and 91.5% respectively).
- LTE coverage across Europe has further increased throughout the first six months of 2015 and LTE is now offered in all countries. In comparison, in 2014 there was one country without LTE coverage and three in 2013. The EU28 coverage grew by 6.5 percentage points, increasing from 79.4% to 85.9%. Norway, Netherlands, Sweden and Denmark were the leaders in terms of LTE coverage in 2015, with over 99% of households covered.

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