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Working Document

Subject: Broadband access in the EU: situation at 1 July 2005.

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Broadband access in the EU as at 1 July 2005

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DEFINITIONS

Definitions used in the tables for the collection of data:

- Fully unbundled lines: Fully unbundled lines supplied to other operators, excluding experimental lines. In the case of full unbundling, a copper pair is rented to a third party for its exclusive use.
- Shared access lines supplied by the incumbent to new entrants: Shared access lines supplied to other operators, excluding experimental lines. In the case of shared access, the incumbent continues to provide telephony service, while the new entrant delivers high-speed data services over that same local loop.
- Bitstream access: Supplied to new entrants. Bitstream access refers to the situation where the incumbent installs a high-speed access link to the customer premises and then makes this access link available to third parties, to enable them to provide high-speed services to customers. Bitstream depends in part on the PSTN and may include other networks such as the ATM network, and bitstream access is a wholesale product that consists of the provision of transmission capacity in such a way as to allow new entrants to offer their own, value-added services to their clients. The incumbent may also provide transmission services to its competitor, to carry traffic to a 'higher' level in the network hierarchy where new entrants may already have a broadband point of presence.
- Simple resale: In contrast to bitstream access, simple resale occurs where the new entrant receives and sells on to end users - with no possibility of value added features to the DSL part of the service - a product that is commercially similar to the DSL product provided by the incumbent to its own retail customers, irrespective of the ISP service that may be packaged with it. Resale offers are not a substitute for bitstream access because they do not allow new entrants to differentiate their services from those of the incumbent (i.e. where the new entrant simply resells the end-to-end service provided to him by the incumbent on a wholesale basis).
- Incumbent's DSL lines: Provided to end users by the incumbent, its subsidiaries or partners (for example an associated company such a joint venture providing ISP services),
- WLL: Internet broadband connections by means of wireless local loop (sometimes referred to as fixed wireless access)
- Cable modem: Internet broadband connections by means of cable TV access
- L.L.: Internet broadband connections by means of dedicated capacity (Leased Lines) provided over metallic copper pairs, including tail ends or partial circuits. "Incumbent's leased lines" includes only retail lines and excludes lines provided to other operators. "New entrants' leased lines" includes all retail lines provided to end users, even if based on wholesale lines supplied by the incumbent.
- Other: Internet broadband connections by means of 3G, satellite, fibre optic, powerline communications, etc.
- Retail access: Access provided to end users.
- Incumbents are defined as the organisations enjoying special and exclusive rights or *de facto* monopoly for provision of voice telephony services before liberalisation, regardless of the role played in the provision of access by means of technologies alternative to the PSTN.
- "New entrants" refers to alternative telecommunications operators, as well as internet service providers (ISPs).
- Broadband capacity: Downstream capacity equal to or higher than 144 Kbit/s

EU OVERVIEW: RETAIL FIXED BROADBAND LINES

The data in this document have been collected by the European Commission, Information Society and Media Directorate General, from national ministries and regulatory authorities. The definitions used have been agreed in the Communications Committee (COCOM).

Throughout the document broadband lines are defined as those with capacity equal to or higher than 144 Kbit/s.

Data refer to the situation at 1 July 2005, except for Cyprus, where data refer to 1 January 2005.

In some cases information for some types of access is not available. In a number of countries certain figures are estimates, as the National Regulatory Authorities had not received consolidated data from operators. It should also be noted that in some cases information only refers to major broadband access providers and that broadband access lines provided by other small operators are not included.

The charts and tables in this document only include fixed broadband lines. Data on 3G mobile subscribers are only available for a limited number of countries and have not been included.

This report includes information from the 10 new Member States that joined the European Union in May 2004 (Estonia, Latvia, Lithuania, Poland, Czech Republic, Slovakia, Hungary, Slovenia, Malta and Cyprus). In this report these countries are referred to as EU10 in contrast to the countries that were already EU Member States at that time, referred to as EU15. This is done in order to analyze trends in broadband penetration since the data gathering process instituted by the Communications Committee (COCOM) started in July 2002.

There were 48 369 359 fixed broadband lines in the EU as of 1 July 2005, a 22% increase since 1 January 2005. Of these lines, 38 795 492 were DSL lines (80.2% of total) and 9 573 867 (19.8%) were provided using other transmission means, mostly cable modem.

Incumbent fixed operators provided 51.5% of these lines, continuing the downward trend recorded since 2003. This figure was 63% in July 2002, 59% in July 2003 and 56% in July 2004.

In the period between July 2004 and July 2005 a total of 18 497 243 new broadband lines were added, an increase of 61.92%. Although in relative terms this growth is lower than in the previous twelve month period (71.81%), in absolute numbers it is higher than the growth recorded between July 2003 and July 2004 (12 485 341 lines).

The large majority of the new lines were by means of xDSL technologies (15 780 809 new lines, 85% of net additions between July 2004 and July 2005), while only 2 716 434 (15%) were connections using other type of technologies.

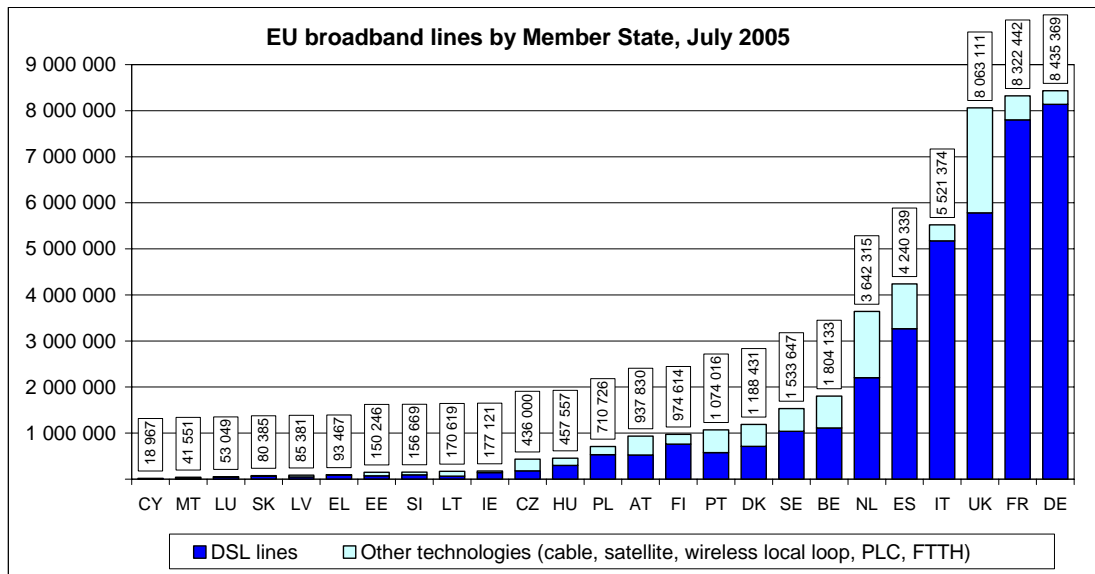
Table 1 shows how the broadband lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005 and 1 July 2005.

Table 1 Retail broadband lines in the EU by country

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	691 970	877 364	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133
CZ				101 000	121 000	228 200	436 000
DK	370 463	459 673	606 457	727 906	921 477	1 039 378	1 188 431
DE	2 611 011	3 244 430	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369
EE			58 515	58 515	102 771	138 617	150 246
EL	450	1 689	2 146	10 006	25 931	51 448	93 467
ES	814 337	1 304 770	1 776 418	2 228 169	2 767 627	3 452 706	4 240 339
FR	735 944	1 656 288	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442
IE	1 344	7 387	9 469	34 050	67 530	138 116	177 121
IT	549 716	976 019	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374
CY				10 063	14 520	18 967	18 967
LV					33 904	56 448	85 381
LT			42 518	64 982	88 279	129 053	170 619
LU		7 455	10 282	15 942	25 334	37 019	53 049
HU				187 228	257 016	365 741	457 557
MT					13 738	38 054	41 551
NL	1 016 704	1 213 861	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315
AT	374 640	451 800	527 050	612 600	707 725	827 675	937 830
PL				173 239	219 901	536 738	710 726
PT	150 846	260 296	369 876	500 437	664 045	864 066	1 074 016
SI				60 398	76 339	118 031	156 669
SK				8 275	14 485	51 869	80 385
FI	152 300	269 700	334 950	447 444	572 100	779 929	974 614
SE	588 700	743 800	847 100	1 010 400	1 131 400	1 385 100	1 533 647
UK	716 630	1 333 056	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111
EU15	8 775 055	12 807 588	17 285 742	22 637 893	28 930 163	37 816 545	46 061 258
EU10			101 033	663 700	941 953	1 681 718	2 308 101
EU25			17 386 775	23 301 593	29 872 116	39 498 263	48 369 359

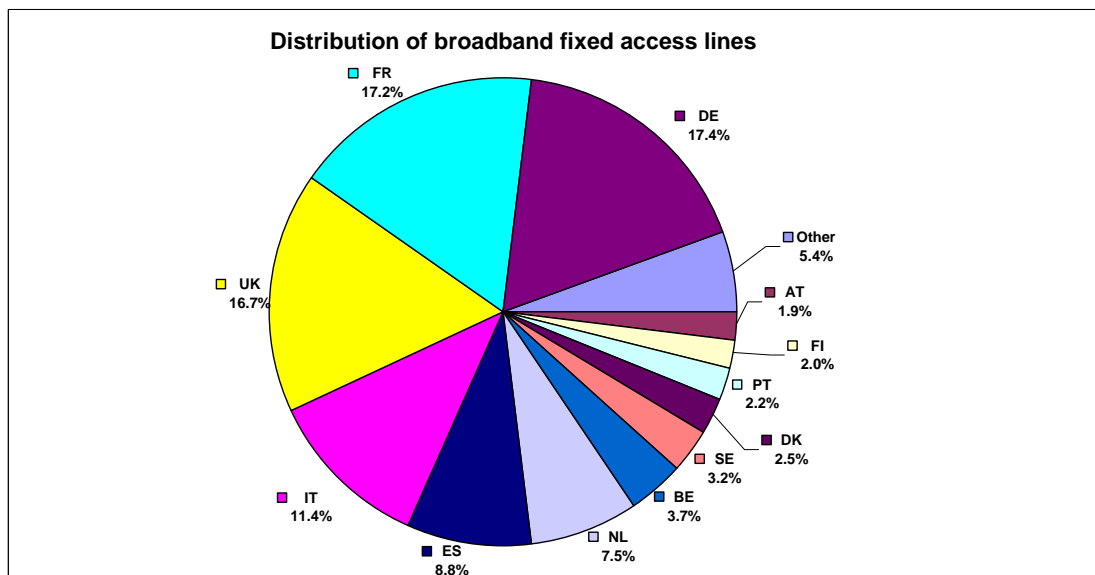
Figure 1 shows the distribution of broadband lines by country, Figure 2 presents this distribution in percentage terms at 1 July 2005, and Figure 3 shows the growth rate since July 2002 (EU15 for the period between July 2002 and January 2003).

Figure 1 EU countries by number of broadband lines



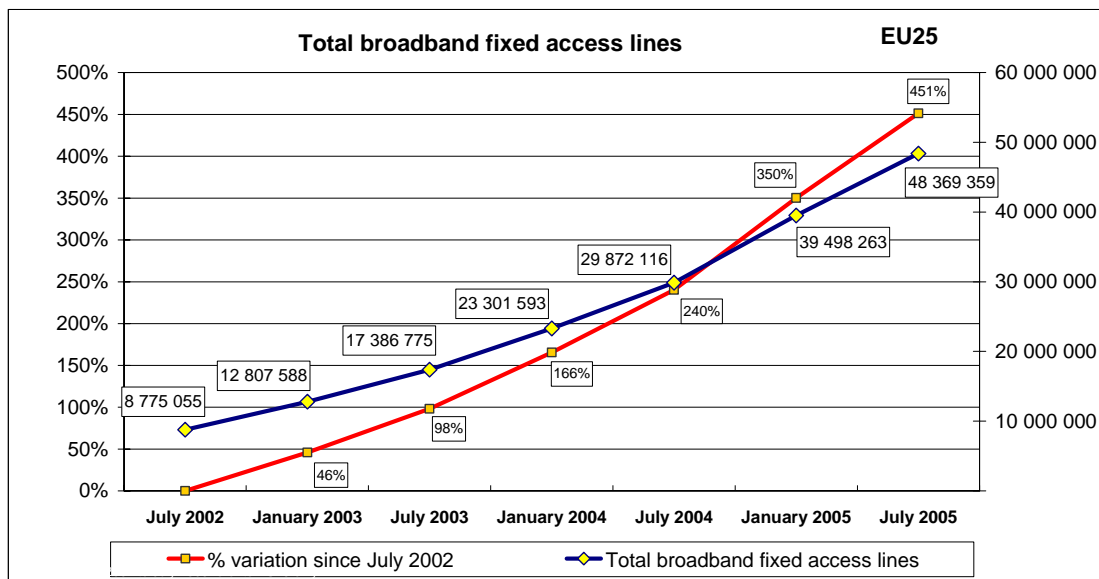
Germany and France each account for more than 17% of all broadband lines, followed by the UK, which has experienced a noticeable increase from 15.3% in January. These three countries now represent almost 52% of all EU broadband connections. Italy, Spain and the Netherlands follow. The new Member States contribute 2.1 million broadband lines¹, which represent 4% of the total.

Figure 2 EU distribution of broadband lines by country (% of broadband lines)



¹ The difference with the number of broadband lines reported in January -2.3 million- is mainly explained by a revision of the Polish data that has resulted in a reduction in the number of lines.

Figure 3 Growth trend since July 2002



The number of broadband lines added per day in the period between July 2004 and July 2005 was 50 677, i.e. 16 471 more connections than the 34 206 new lines per day between July 2003 and July 2004. In other words, in July 2005 there were 48% more lines added every day than a year before.

It is however interesting to note that the absolute growth in the first half of 2005 - 8 871 096 lines - was lower than in the second half of 2004 - 9 626 147 lines. If this pattern is maintained a significant increase could be expected in the last quarter of 2005.

Figure 4 shows that for the first time the UK was the most dynamic broadband market in the EU, adding 3 667 550 new lines in the period between July 2004 and July 2005, followed by France, Germany and Italy.

Figure 4 Broadband lines added, by country

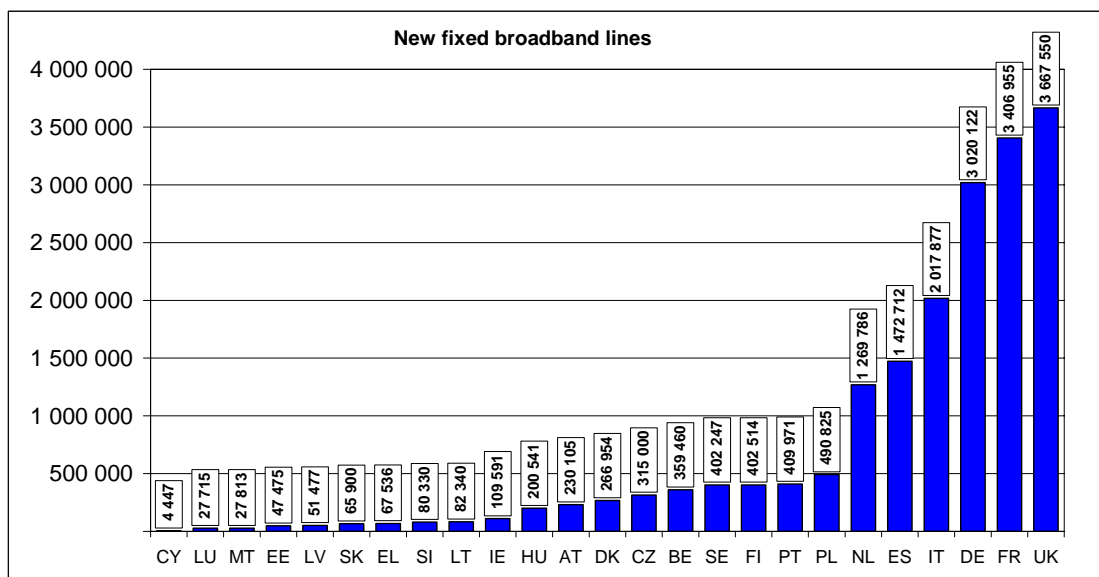


Figure 5 shows the penetration rate of broadband measured as the number of broadband lines per 100 population. In two countries, Denmark and the Netherlands, this rate is above 20%, In 13 other countries the penetration rate ranges between 10% and 19%. At EU15 level the penetration rate is 12%, rising from 7.6% in July 2004. At EU25 level the penetration rate is 10.6%, up 4 points from July 2004.

Figure 5 Penetration rate. Lines per 100 population

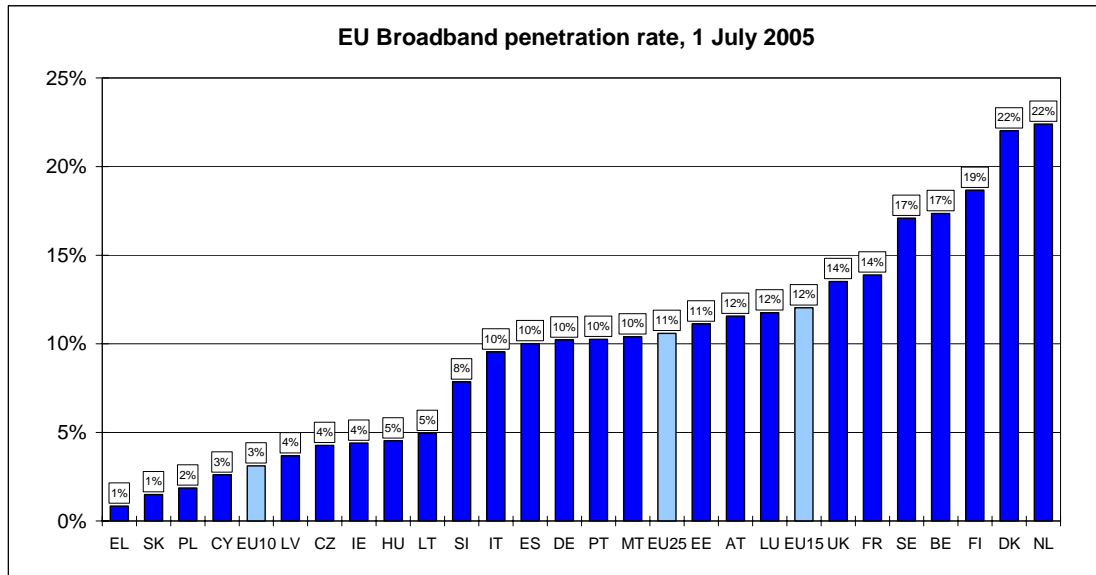


Figure 6 combines the penetration rate as at July 2005 and the growth of this indicator in percentage points during the period between July 2004 and July 2005.

Growth has accelerated in the Netherlands, Finland, Malta, Luxembourg and the UK, while it has slowed down in Belgium. In this latter country there were 1093 lines per day added in the period between July 2003 and July 2004, while between July 2004 and July 2005 this figure was 985.

Figure 6 Penetration rate and speed of progress

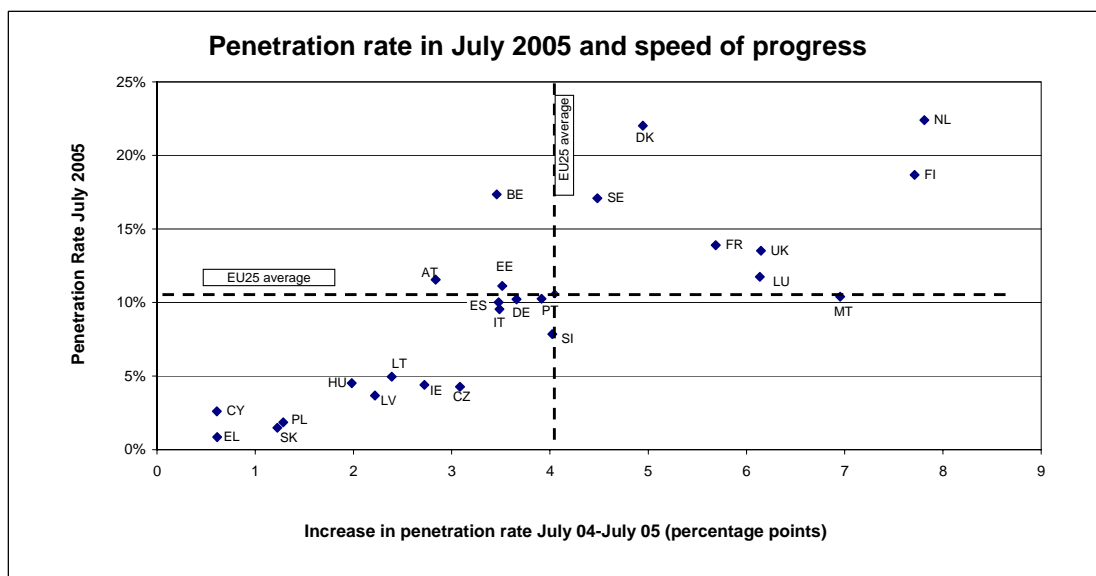


Figure 7 shows the percentage of broadband lines provided by the incumbent fixed operators and by the other operators. Figure 8 displays the trend in the percentage of broadband lines provided by the incumbent fixed operators.

Figure 7 Broadband lines market share

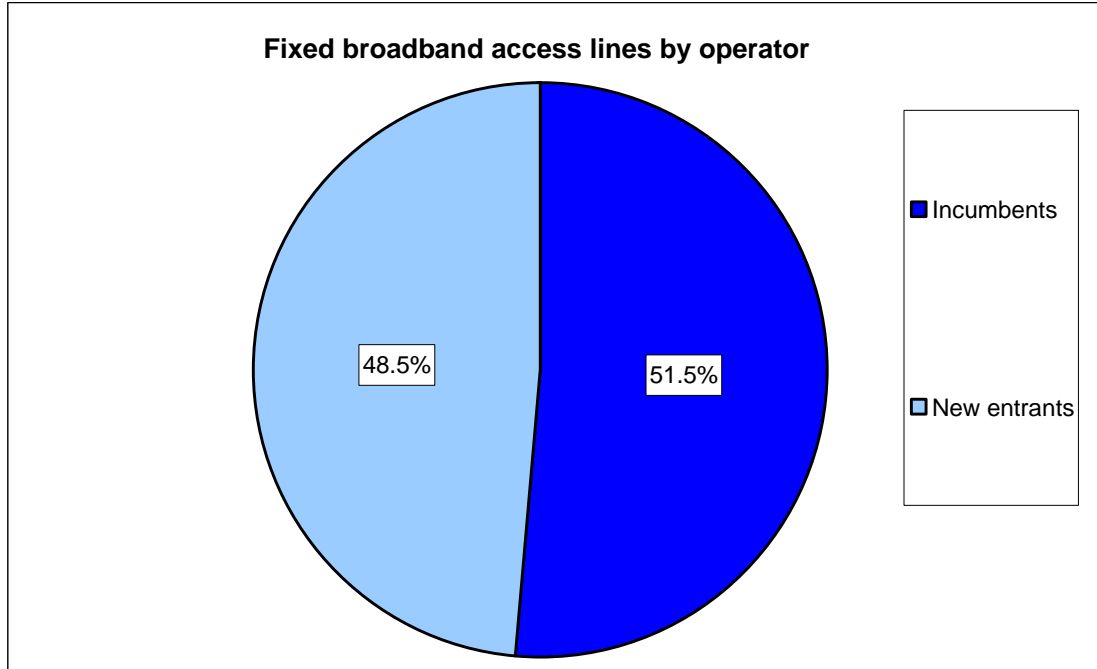
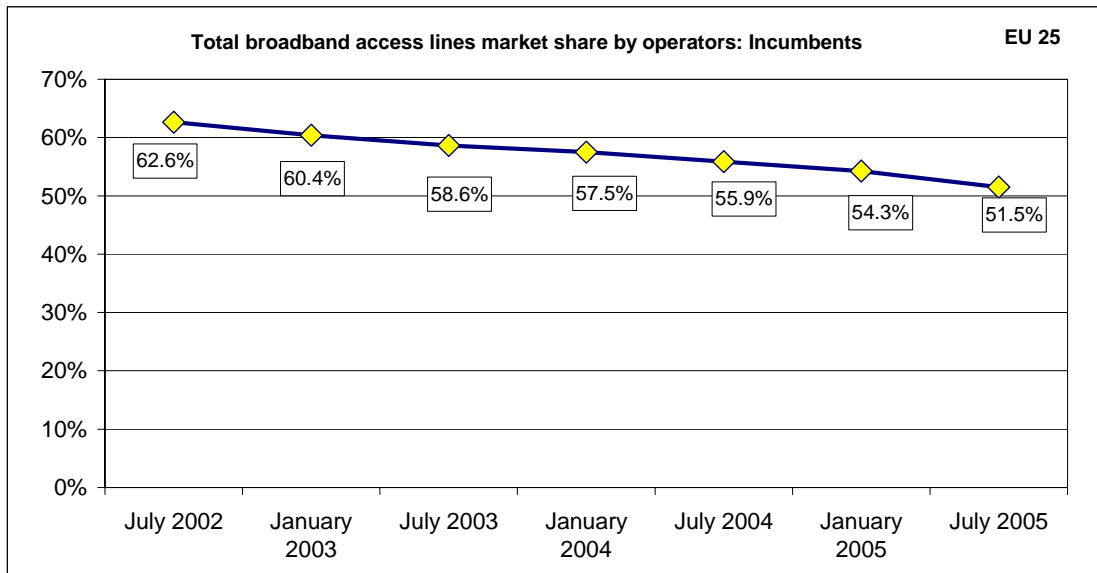


Figure 8 Trend in the percentage of broadband lines provided by the incumbent fixed operators



DSL LINES

There were 38 795 492 DSL lines in the EU as of 1 July 2005, a 68.57% increase since 1 July 2004.

In the period between July 2004 and July 2005 a total of 15 780 809 new DSL lines were added. This represents 5 399 166 more lines than the 10 381 644 new lines installed in the period between July 2003 and July 2004.

Incumbent fixed operators provided 62.3% of these lines, down from 69.8% in July 2004 and 77.9% in July 2003.

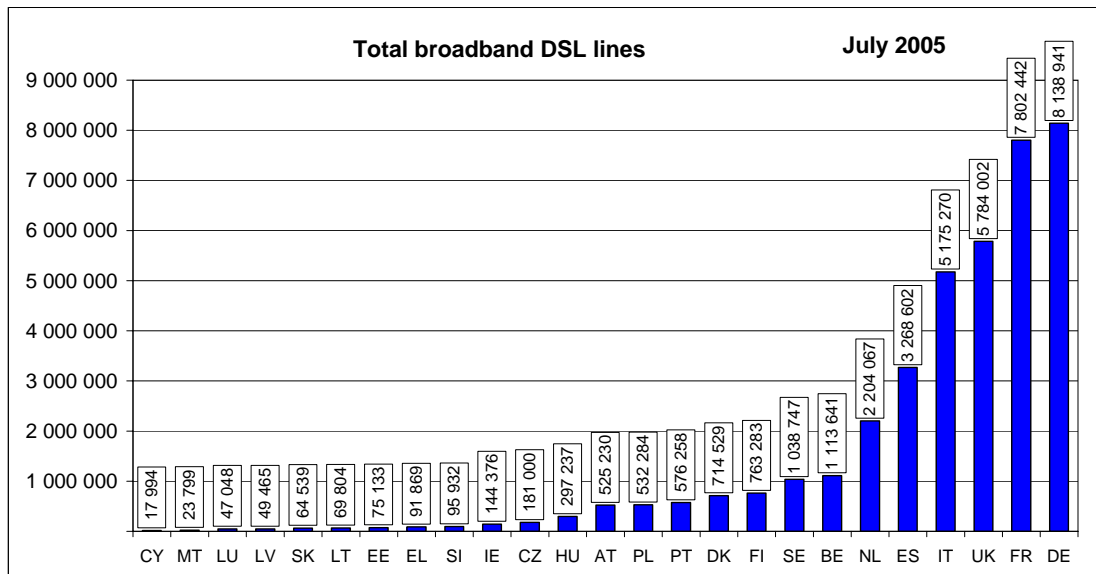
Table 2 shows how the DSL lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005 and 1 July 2005.

Table 2 DSL retail lines in the EU by country

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	401 453	523 619	627 970	765 183	889 294	996 118	1 113 641
CZ				21 000	36 000	106 000	181 000
DK	232 281	306 944	390 692	473 359	562 009	638 961	714 529
DE	2 570 011	3 185 015	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941
EE			37 558	37 558	50 906	64 628	75 133
EL	93	93	359	8 588	22 937	46 547	91 869
ES	643 625	957 204	1 297 563	1 676 466	2 086 172	2 604 067	3 268 602
FR	526 413	1 406 769	2 099 933	3 262 800	4 490 487	6 293 249	7 802 442
IE	990	3 287	5 369	24 400	57 445	115 583	144 376
IT	487 876	835 525	1 387 658	2 158 458	3 223 188	4 402 585	5 175 270
CY				10 033	14 490	17 994	17 994
LV					26 815	39 281	49 465
LT			15 444	26 438	34 074	50 688	69 804
LU		6 858	8 960	13 860	22 128	32 607	47 048
HU				117 369	165 980	239 810	297 237
MT					11 426	22 145	23 799
NL	216 704	413 861	679 508	978 044	1 374 129	1 884 561	2 204 067
AT	138 640	179 600	224 650	279 600	355 725	442 075	525 230
PL				80 239	108 901	410 186	532 284
PT	5 542	52 810	107 537	184 860	293 435	424 169	576 258
SI				38 330	53 840	74 922	95 932
SK				4 210	9 900	38 334	64 539
FI	112 300	215 200	271 000	328 704	400 000	585 650	763 283
SE	357 200	439 800	495 300	595 200	686 200	883 200	1 038 747
UK	294 100	590 278	1 099 518	1 804 609	2 753 061	4 203 651	5 784 002
EU15	5 987 228	9 116 863	12 580 037	17 052 217	22 502 351	30 262 706	37 388 305
EU10			53 002	335 177	512 332	1 063 988	1 407 187
EU25			12 633 039	17 387 394	23 014 683	31 326 694	38 795 492

Figure 9 displays the distribution of DSL lines by country, Figure 10 presents this distribution in percentage terms at 1 July 2005 and Figure 11 shows the growth rate since July 2002 (EU15 for the period between July 2002 and January 2003).

Figure 9 EU countries by number of DSL lines



Germany accounts for 21% of all DSL lines followed by France with 20%. The UK has overtaken Italy as the third country with the highest number of DSL lines. These three countries provide 55% of all DSL lines, as shown in Figure 10. The new Member States contribute 1.4 million DSL lines, which represent 3.6% of the total DSL lines.

Figure 10 EU distribution of DSL lines by country (% of DSL lines)

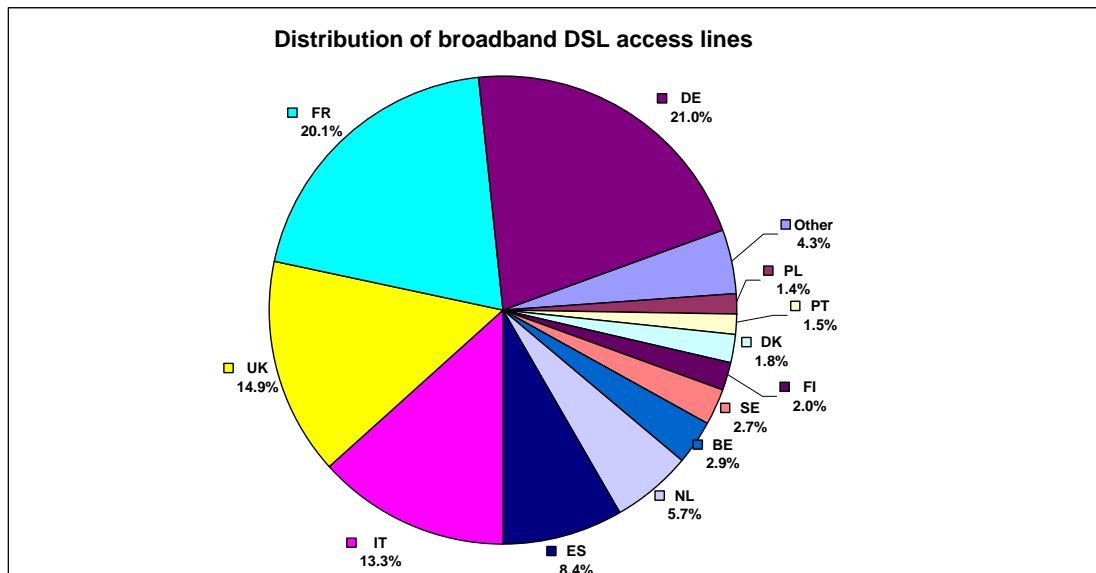
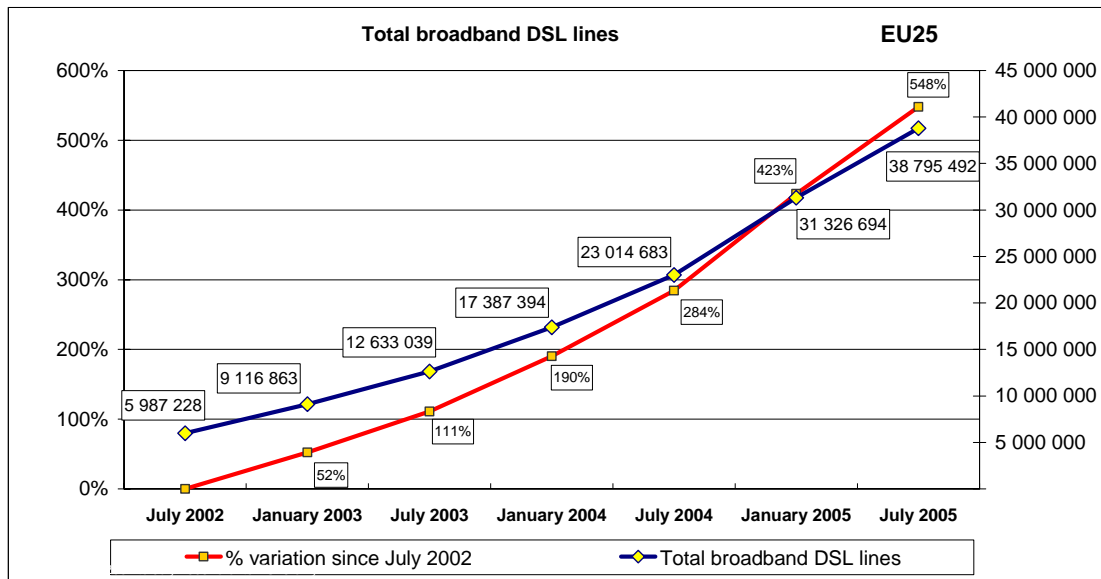


Figure 11 Growth trend since July 2002



The number of DSL lines added each day in the period between July 2004 and July 2005 was 43 235, which means that 52% more lines per day were added than in the period between July 2003 and July 2004, when 28 443 new DSL connections per day were recorded.

France added 3 311 955 new lines over the period, followed by the UK, Germany and Italy.

Figure 12 DSL lines added, by country

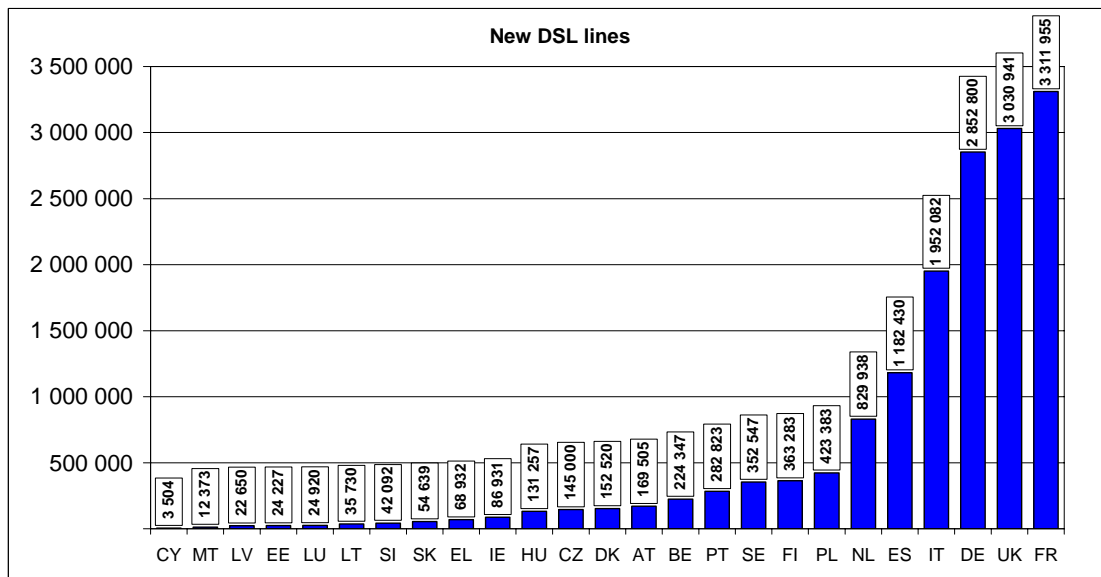


Figure 13 shows the percentage of DSL lines provided by the incumbent fixed operators and the new entrants. Figure 14 displays the trend in the percentage of DSL lines provided by incumbent fixed operators.

Figure 13 DSL lines market share by operator

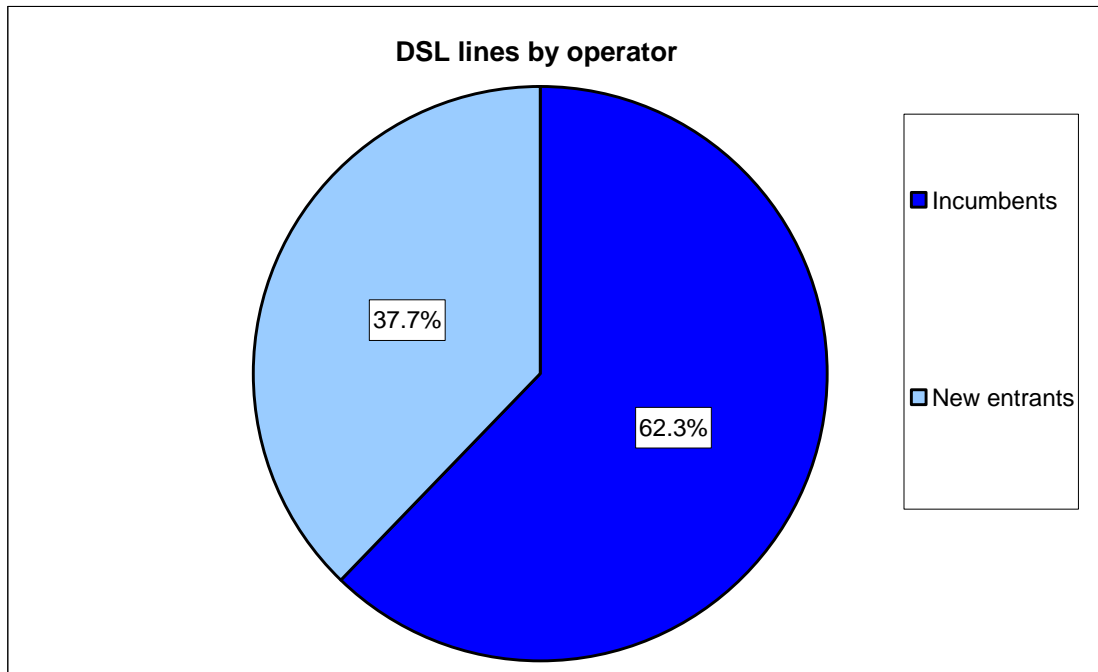


Figure 14 Trend in the % of DSL lines provided by incumbent fixed operators

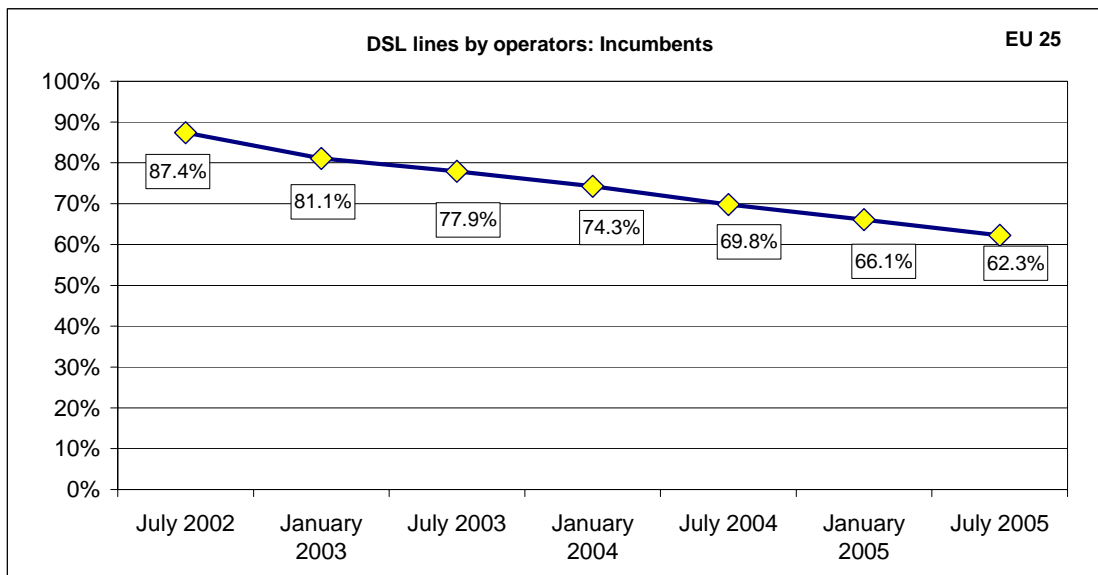


Figure 15 displays the type of access used by new entrants' to provide DSL lines to their customers. Bitstream access (30.2%) and resale lines (29.1%) are the most common types of access. The reduction in the number of resale and bitstream lines continues - these types of lines represented 32.7% and 34.6% respectively of new entrants' DSL lines in July 2004. Shared access lines, on the other hand, now account for 22.3% of new entrants' lines compared to 16.5% a year previously. This trend can be seen in Figure 16, where fully unbundled and shared access lines have been combined (L.L.U.) and account altogether for 40.7% of new entrants' DSL lines.

Figure 15 New entrants' DSL lines by type of access

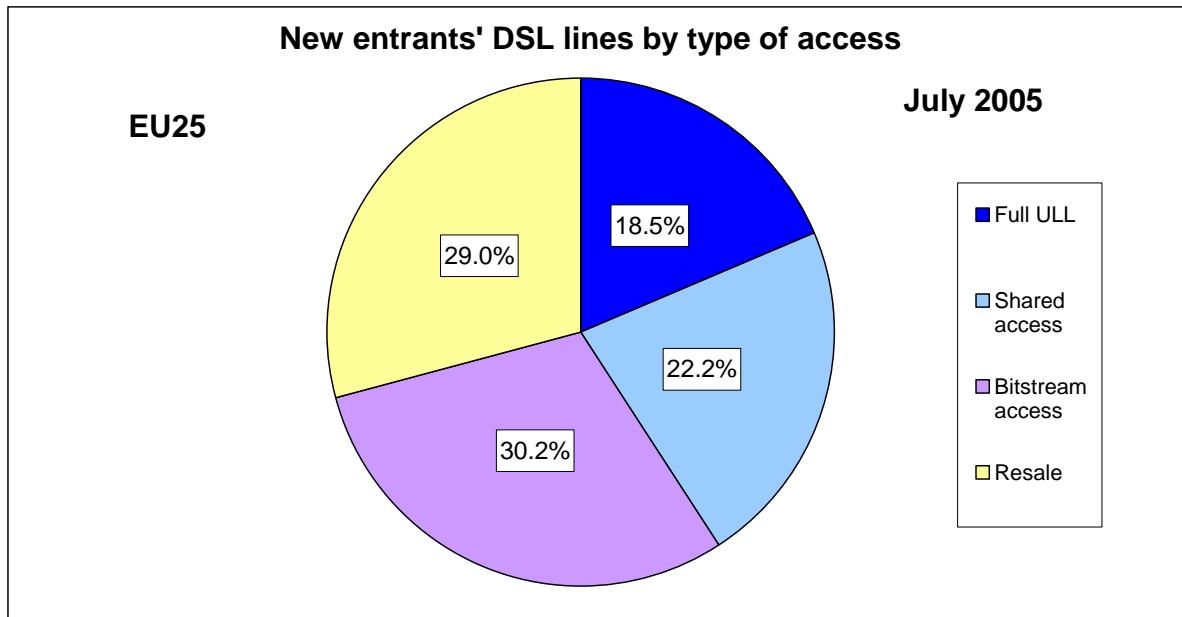
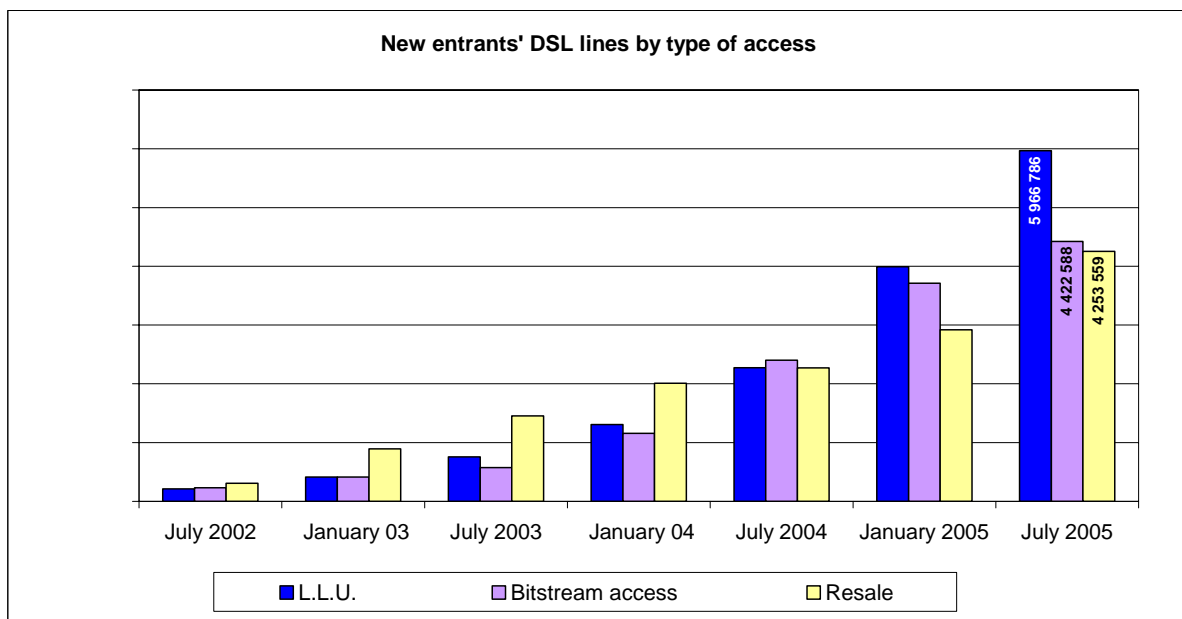


Figure 16 New entrants' DSL lines by type of access



FIXED BROADBAND LINES USING TECHNOLOGIES OTHER THAN DSL
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There were 9 573 867 broadband lines using technologies other than DSL in the EU as of 1 July 2005. 2 716 434 lines were added, which represents a 39.6% increase since 1 July 2004. Net additions in the period between July 2004 and July 2005 were slightly higher than between July 2003 and July 2004, when 2 103 697 new lines were sold.

Alternative operators provided 92.1% of these lines, 1.2 points higher than the percentage of July 2004.

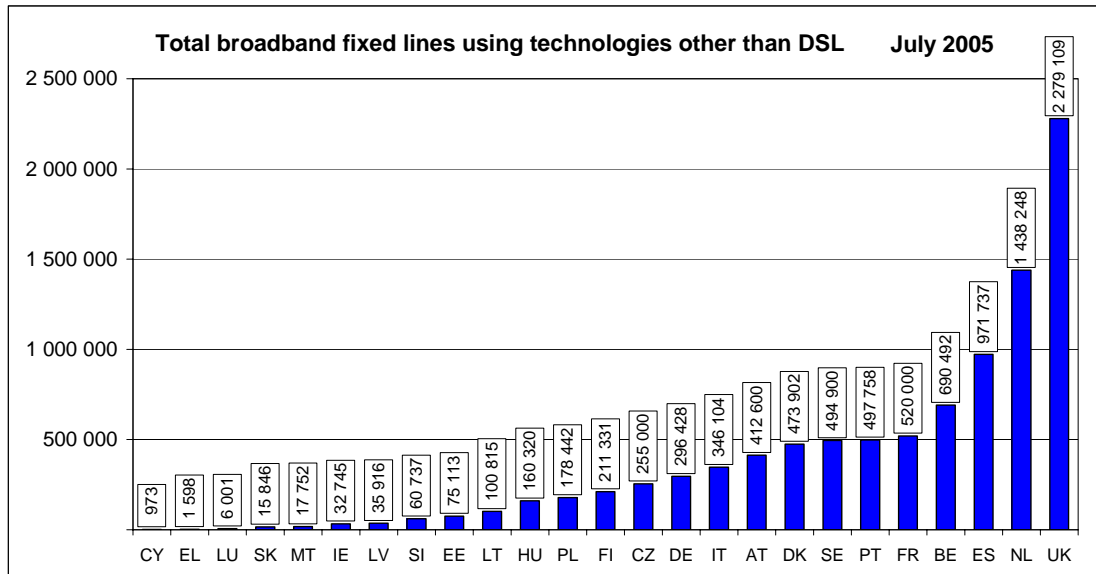
Table 3 shows how the non-DSL broadband lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005 and 1 July 2005.

Table 3 Non-DSL broadband lines in the EU by Country

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	290 517	353 745	417 897	479 553	555 379	623 638	690 492
CZ				80 000	85 000	122 200	255 000
DK	138 182	152 729	215 765	254 547	359 468	400 417	473 902
DE	41 000	59 415	87 262	169 371	129 106	195 476	296 428
EE			20 957	20 957	51 865	73 989	75 113
EL	357	1 596	1 787	1 418	2 994	4 901	1 598
ES	170 712	347 566	478 855	551 703	681 455	848 639	971 737
FR	209 531	249 519	313 707	393 854	425 000	500 000	520 000
IE	354	4 100	4 100	9 650	10 085	22 533	32 745
IT	61 840	140 494	198 536	243 481	280 309	298 647	346 104
CY				30	30	973	973
LV					7 089	17 167	35 916
LT			27 074	38 544	54 205	78 365	100 815
LU		597	1 322	2 082	3 206	4 412	6 001
HU				69 859	91 036	125 931	160 320
MT					2 312	15 909	17 752
NL	800 000	800 000	900 000	930 000	998 400	1 200 000	1 438 248
AT	236 000	272 200	302 400	333 000	352 000	385 600	412 600
PL				93 000	111 000	126 551	178 442
PT	145 304	207 486	262 339	315 577	370 610	439 897	497 758
SI				22 068	22 499	43 109	60 737
SK				4 065	4 585	13 535	15 846
FI	40 000	54 500	63 950	118 740	172 100	194 279	211 331
SE	231 500	304 000	351 800	415 200	445 200	501 900	494 900
UK	422 530	742 778	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109
EU15	2 787 827	3 690 725	4 705 705	5 585 676	6 427 812	7 553 839	8 672 953
EU10			48 031	328 523	429 621	617 729	900 914
EU25			4 753 736	5 914 199	6 857 433	8 171 568	9 573 867

Figure 17 displays the distribution by country, Figure 18 presents this distribution in percentage terms at 1 January 2004 and Figure 19 shows the growth rate since July 2002.

Figure 17 EU countries by number of broadband lines using other technologies



The UK accounts for 25% of all broadband lines using other technologies, as shown in Figure 18. The Netherlands has the second largest individual share, with 13%, followed by Spain and Belgium with 10.7% and 7.6% respectively. These four countries account for 55% of this category of broadband line in the EU.

Figure 18 EU distribution of broadband lines using other technologies by country (% of lines)

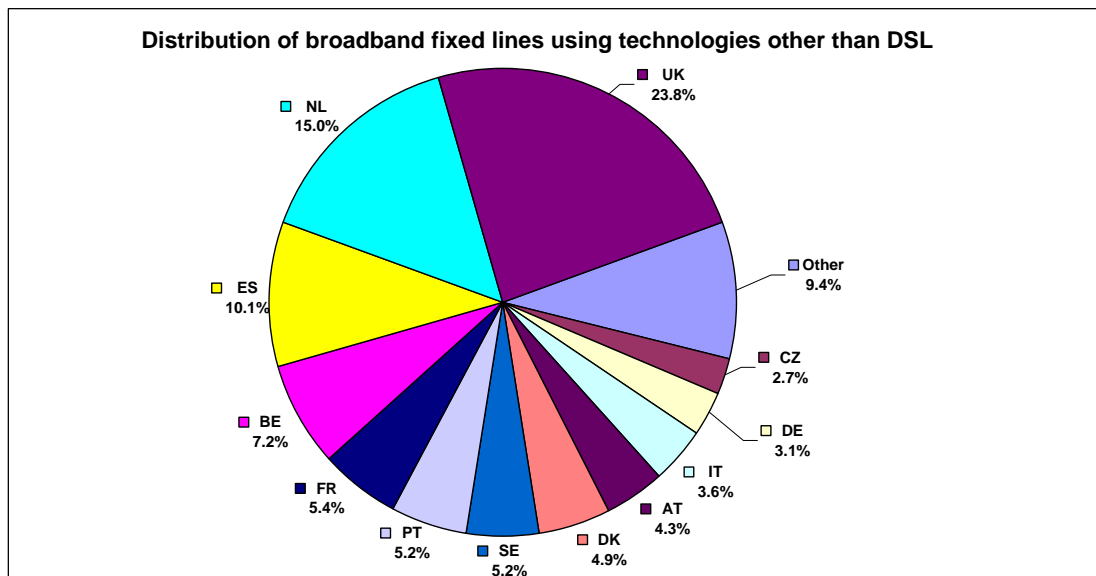
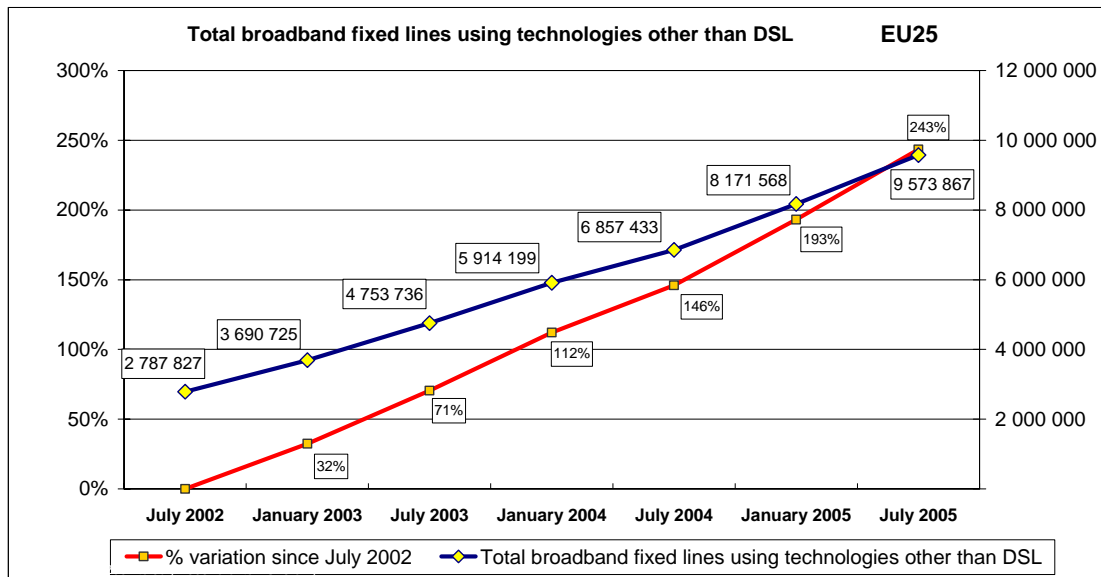


Figure 19 Growth trend since July 2002



7 442 broadband lines using other technologies were added each day in the period between July 2004 and July 2005. This compares to the 5 764 new lines per day between July 2003 and July 2004 and represents a 29.1% increase.

The UK added 636 609 lines using technologies other than DSL, 100 000 more new connections than the 536 515 lines added between July 2003 and July 2004. The Netherlands also added almost half a million lines. In all the other countries combined the total number of new lines was 1.6 million. In Greece the growth was negative due to the reduction in the number of leased lines reported.

Figure 20 Broadband lines using other technologies added by country

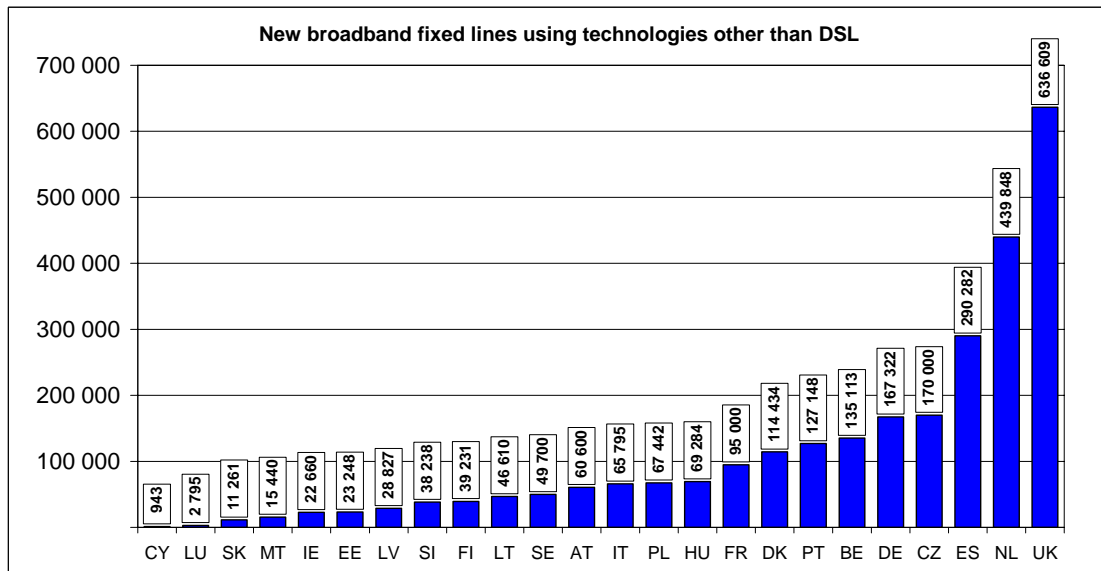
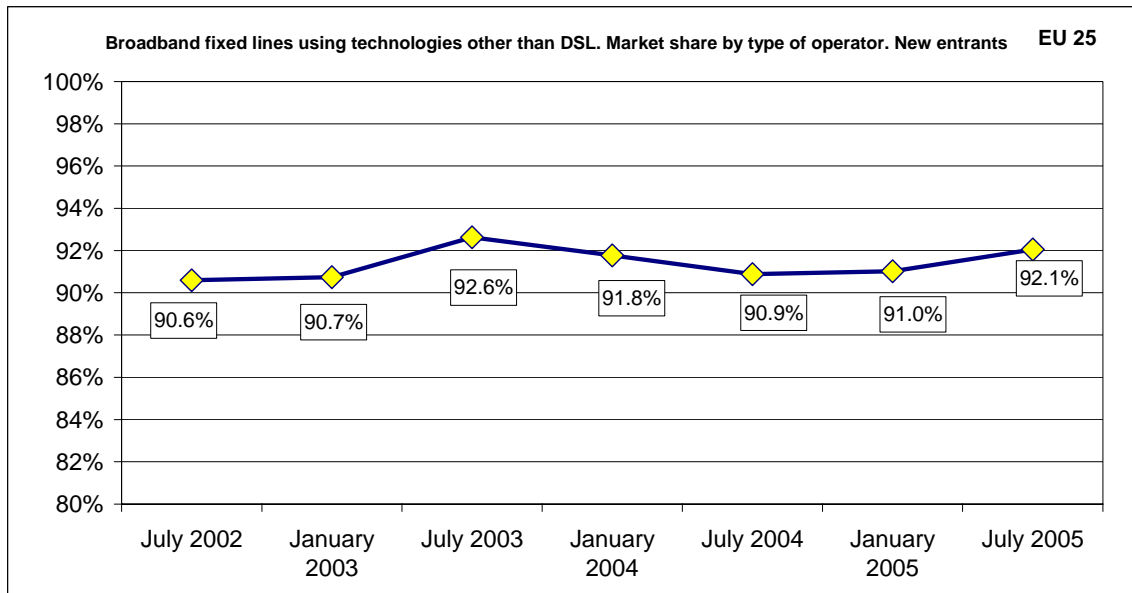


Figure 21 and 22 show the percentage of broadband lines using other technologies provided by the incumbent fixed operators and the alternative operators and the trend since July 2002.

Figure 21 Broadband lines using other technologies: market share



Figure 22 Trend in the % of lines using technologies other than DSL provided by new entrants



ANNEX: DATA ON LOCAL BROADBAND ACCESS (WHOLESALE AND RETAIL)

This annex provides additional information, by Member State, on unbundling, shared access and wholesale DSL, as well as incumbents' and new entrants' retail DSL offerings and incumbents' and new entrants' retail offerings by means other than DSL (WLL, cable, leased lines and others such as satellite, Fibre to the Home or Powerline Communications).

Availability of wholesale access 1 July 2005

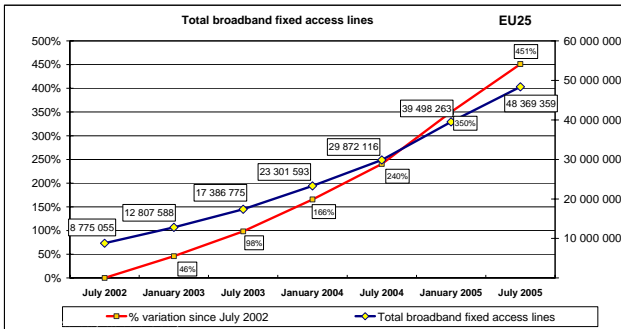
Country	Incumbent's PSTN activated main lines	Fully unbundled lines supplied by the incumbent to new entrants			Shared access lines supplied by the incumbent to new entrants			Wholesale DSL lines supplied			
		Unbundled lines	Requested lines	N. of agreements	Shared lines	Requested lines	N. of agreements	Bitstream access		Simple resale	
								No. of lines	No. of agreements	No. of lines	No. of agreements
Belgium	4,317,833	6,760	175	8	1,909		8	183,076	11	74,251	27
Czech Republic	3,249,000	1,035	n.a.	4	4,158	n.a.	4	n.a.	n.a.	50751	19
Denmark	3,310,209	62,567	n.a.	17	62,082	na	6	94,741	11	12041	10
Germany	36,000,000	2,936,000		99	5,352		16		3	1,100,000	n.a.
Estonia	411,000	3,607	3,607	n.a.						n.a.	1
Greece	5,500,000	3,883	396	12	1,530	48	1	105,071	10		
Spain	15,642,543	132,416	10,404	13	228,870	26,287	12	789,705	30		
France	33,440,000	255,584		18	2,073,942		18	1,676,659	5	135,065	20
Ireland	1,590,000	1,903	46	3	1,424	3	3	31,721	9		
Italy	25,449,000	1,163,195	20,441	26	110,975	148,831	6	1,168,000	234		
Cyprus	420,000	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	2,647	n.a.	n.a.	n.a.
Latvia	624,000			2			2	1199	11		
Lithuania	801,144							2,841	16		
Luxembourg	241,000	2,964	60	3	98	8	4			6,748	5
Hungary	3,420,000	10		6			1	86,279	17		
Malta	205,000									13,803	19
Netherlands	5,200,000	60,811	n.a.	10	523,251	n.a.	10		1		
Austria	2,875,900	97,044	4,704	26	75	n.a.	26	94,900	38		
Poland	8,967,000										
Portugal	3,871,189	27,891	2,848	2	6		1	545,778	8		
Slovenia	700,000					1,219	3	2,739	10	1375	3
Slovakia	1,219,589										
Finland	2,267,706	210,861	n.a.	n.a.	48,559	n.a.	n.a.	79,737	n.a.	n.a.	n.a.
Sweden	5,400,000	45,185	n.a.	122	287,060	n.a.	122	3,200	26	138,000	n.a.
United Kingdom	29,600,000	38,418		44	34,722		22	593,622	49	3,114,835	780
EU15	174,705,380	5 045 482	39074	403	3 379 855	175177	255	5 366 210	435	4580940	842
EU10	20,016,733	4,652	3,607	12	4,158	1,219	10	95,705	54	65,929	42
EU25	194,722,113	5,050,134	42,681	415	3,384,013	176,396	265	5,461,915	489	4,646,869	884

BROADBAND RETAIL LINES, 1 JULY 2005

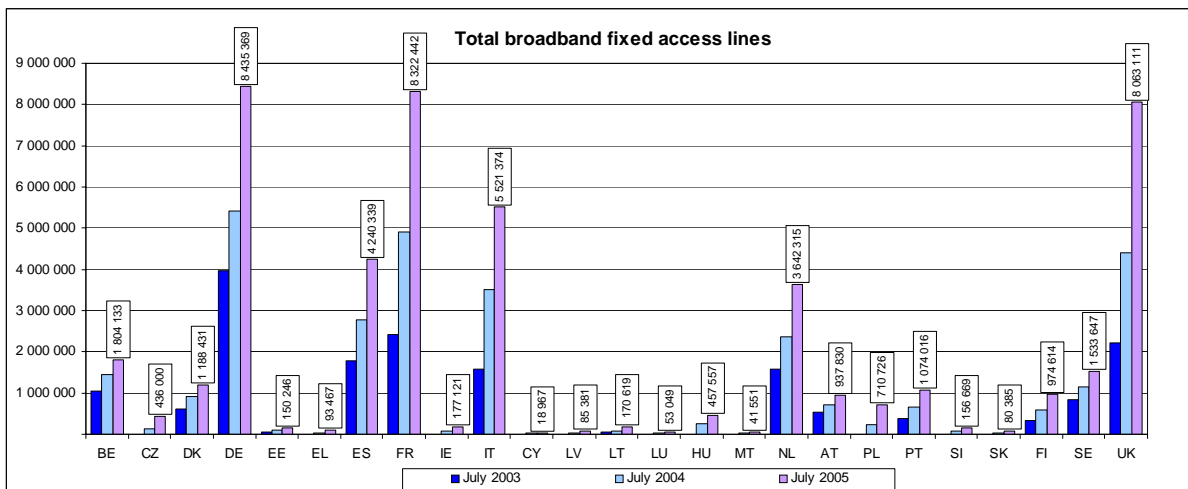
July 05		New entrants' DSL lines on PSTN July 2005					Incumbents' access lines by other means									New entrants' access lines by other means									
	Incumbent's DSL lines	Full ULL	Shared access	Bitstream access	Resale	Total	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Total	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Total	
BE	880 393	3 872	1 874	156 976	70 526	233 248			41					41	70	688 379	1 926						76	690 451	
CZ	151 000	n.a.	n.a.		30 000	30 000	1 000		n.a.		n.a.			n.a.	1 000	160 000	90 000	n.a.		n.a.	4 000	n.a.		254 000	
DK	519 377	55 553	52 933	76 380	10 286	195 152		132 626	3 284					3 036	138 946	3 128	199 233	4 681		8 758	4	88	119 064	334 956	
DE	6 000 000	1 400 000	3 941		735 000	2 138 941			40 145	n.a.	n.a.	3 683		43 828	n.a.	196 000	n.a.	n.a.	n.a.	47 000	9 600	n.a.		252 600	
EE	72 216	2 854			63	2 917	879				3 508			115	4 502	1 515	41 324			14 198			13 574	70 611	
EL	41 317	3 823	1 405	45 324		50 552			n.a.						280			1 269		49				1 598	
ES	2 180 994	121 842	175 119	790 647		1 087 608	684		n.a.		n.a.	3 127		3 811	9 243	935 986	12 474		1 832	2 009	4 491	1 891		967 926	
FR	3 661 192	255 584	2 073 942	1 676 659	135 065	4 141 250	n.a.		n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	520 000	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	520 000	
IE	109 328	1 903	1 424	31 721		35 048	n.a.	n.a.	2 249	n.a.	n.a.	n.a.	n.a.	2 249	12 500	13 000	4 106	n.a.		890			n.a.	30 496	
IT	3 854 408	496 654	80 398	742 560	1 250	1 320 862		496 654	767		119	55 594		258	56 738	640	20	4 036		198 668	86 000		2	289 366	
CY	17 994	n.a.	n.a.	n.a.	n.a.		n.a.	n.a.	22	n.a.	n.a.	n.a.	n.a.	951	973	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.		
LV	48 749	507	1	165	43	716	306		n.a.		n.a.	n.a.		306	3 505	12 462	858		524	3	119	18 139		35 610	
LT	66 963			2 841		2 841			148		62			210	13 846	38 124	1 131		10 174		30	37 300		100 605	
LU	40 657	1 553	59		4 779	6 391		568	170					738	49	5 183	10						21	5 263	
HU	219 148	n.a.	1	78 088		78 089	1 200	15 820	1 500		n.a.	n.a.		n.a.	18 520	7 300	130 000	3 500		1 000	n.a.		n.a.	141 800	
MT	10 283				13 516	13 516										17 752								17 752	
NL	1 620 005	60 811	523 251	n.a.		584 062			n.a.		n.a.	n.a.			n.y.a.	1 438 248	n.a.		n.a.	n.a.	n.a.	n.a.	n.a.	1 438 248	
AT	349 000	81 255	75	94 900		176 230			n.a.	n.a.			n.a.		2 000	405 000	n.a.	n.a.	1 000	n.a.	4 600	n.a.		412 600	
PL	532 284														1 665	155 974	19 124		9	263			1 407	178 442	
PT	500 405	27 623	6	48 224	n.a.	75 853	n.a.	352 463	1 258	n.a.	n.a.	n.a.		353 721	1 636	138 919	1 982	n.a.	n.a.	n.a.	1 500	n.a.		144 037	
SI	94 192			1 544	196	1 740		1 001	n.a.		315			1 316	358	58 288			485			290		59 421	
SK	64 539								174					174	1 200	14 472				n.a.				15 672	
FI	516 710	118 277	48 559	79 737		246 573	142	68 766			60		64 895	133 863	3 277	58 398			186		1 004	14 603		77 468	
SE	599 000	38 441	260 106	3 200	138 000	439 747	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.		7 000	243 000	n.a.	n.a.	240 000	800	100	4 000		494 900	
UK	2 002 405	38 418	34 722	593 622	3 114 835	3 781 597									2 500	2 270 609						6 000		2 279 109	
EU15	22 875 191	2705609	3257814	4339950	4209741	14 513 114	826	554423	47914	0	179	62404	0	68189	733 935	42323	7111975	30484	0	450493	142703	21383	139657	7 939 018	
EU10	1 277 368	3 361	2	82 638	43 818	129 819	3 385	16 821	1 844		3 885			1 066	27 001	189 389	558 396	24 613		26 390	4 266	149	70 710	873 913	
EU25	24 152 559	2 708 970	3 257 816	4 422 588	4 253 559	14 642 933	4 211	571 244	49 758		4 064	62 404		69 255	760 936	231 712	7 670 371	55 097		476 883	146 969	21 532	210 367	8 812 931	

Broadband access in the EU as at 1 July 2005

Total broadband access retail fixed lines in EU25



Total broadband lines	% variation since July 2002	Variation July 04-July 05
July 2002	8 775 055	% 61.92%
October 2002	10 298 146	17% New lines 18 497 243
January 2003	12 807 588	46% Lines/day 50677
July 2003	17 386 775	98% Variation July 03-July 04
October 2003	19 394 914	121% % 71.81%
January 2004	23 301 593	166% New lines 12 485 341
July 2004	29 872 116	240% Lines/day 34206
October 2004	33 438 713	281% Variation July 02-July 03
January 2005	39 498 263	350% % 98.14%
July 2005	48 369 359	451% New lines 8 611 720
		Lines/day 23594
		Variation lines/day: 48.2%

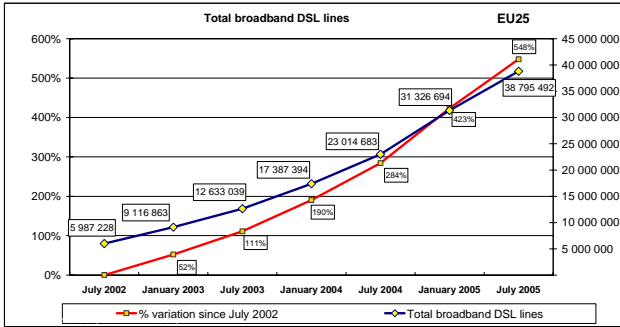


	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	877 364	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133
CZ			101 000	121 000	228 200	436 000
DK	459 673	606 457	727 906	921 477	1 039 378	1 188 431
DE	3 244 430	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369
EE		58 515	58 515	102 771	138 617	150 246
EL	1 689	2 146	10 006	25 931	51 448	93 467
ES	1 304 770	1 776 418	2 228 169	2 767 627	3 452 706	4 240 338
FR	1 656 288	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442
IE	7 387	9 469	34 050	67 530	138 116	177 121
IT	976 019	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374
CY			10 063	14 520	18 967	18 967
LV				33 904	56 448	85 381
LT		42 518	64 982	88 279	129 053	170 619
LU	7 455	10 282	15 942	25 334	37 019	53 049
HU			187 228	257 016	365 741	457 557
MT				13 738	38 054	41 551
NL	1 213 861	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315
AT	451 800	527 050	612 600	707 725	827 675	937 830
PL			173 239	219 901	536 738	710 726
PT	260 296	369 876	500 437	664 045	864 066	1 074 016
SI			60 398	76 339	118 031	156 669
SK			8 275	14 485	51 869	80 385
FI	269 700	334 950	447 444	572 100	779 929	974 614
SE	743 800	847 100	1 010 400	1 131 400	1 385 100	1 533 647
UK	1 333 056	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111
EU 15	12 807 588	17 285 742	22 637 893	28 930 163	37 816 545	46 061 258
EU10	101 033	663 700	663 700	941 953	1 681 718	2 308 101
EU25	17 386 775	23 301 593	29 872 116	39 498 263	48 369 359	

	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	July 2003 - July 2004			July 2004 - July 2005		
BE	398 806	38%	1 093	359 460	25%	985
CZ				315 000	260%	863
DK	315 020	52%	863	266 954	29%	731
DE	1 443 965	36%	3 956	3 020 122	56%	8 274
EE				47 475	46%	130
EL	23 785	1108%	65	67 536	260%	185
ES	991 209	56%	2 716	1 472 712	53%	4 035
FR	2 501 847	104%	6 854	3 406 955	69%	9 334
IE	58 061	613%	159	109 591	162%	300
IT	1 917 303	121%	5 253	2 017 877	58%	5 528
CY				4 447	31%	12
LV				51 477	152%	141
LT				82 340	93%	226
LU	15 052	146%	41	27 715	109%	76
HU				200 541	78%	549
MT				27 813	202%	76
NL	793 021	50%	2 173	1 269 786	54%	3 479
AT	180 675	34%	495	230 105	33%	630
PL				490 825	223%	1 345
PT	294 169	80%	806	409 971	62%	1 123
SI				80 330	105%	220
SK				65 900	455%	181
FI	237 150	71%	650	402 514	70%	1 103
SE	284 300	34%	779	402 247	36%	1 102
UK	2 190 058	99%	6 000	3 667 550	83%	10 048
EU 15	11 644 421	67%	31 903	17 131 095	59%	46 935
EU10				1 366 148	145%	3 743
EU25				18 497 243	62%	50 677

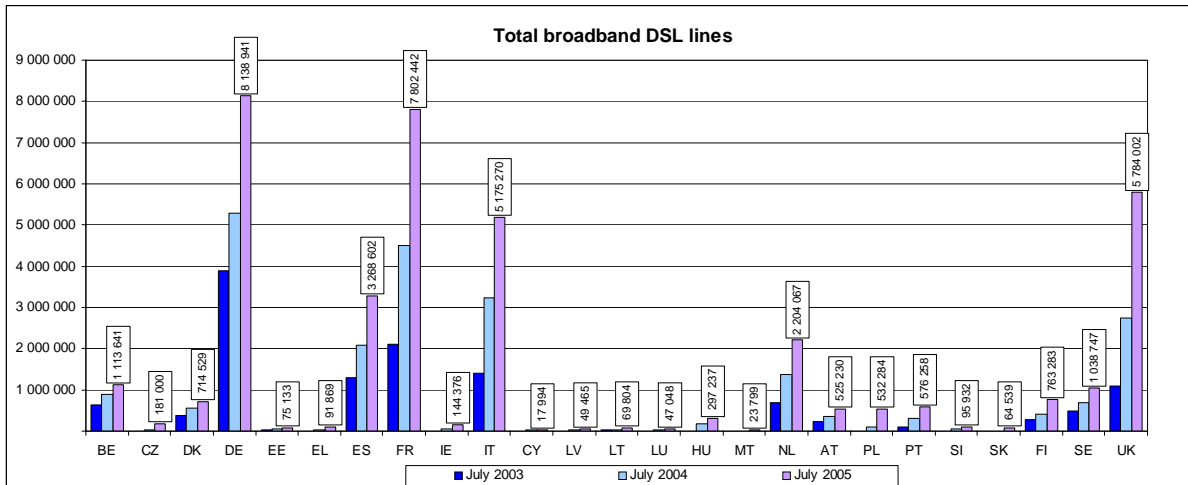
Broadband access in the EU as at 1 July 2005

Total DSL retail lines in EU25



Total broadband DSL lines	% variation since July 2002	Variation July 04-July 05
		% 66.57%
July 2002	5 987 228	New lines 15 780 809
October 2002	7 073 147	18% Lines/day 43235
January 2003	9 116 863	52% Variation July 03-July 04
July 2003	12 633 039	111% % 82.18%
October 2003	14 386 110	140% New lines 10 381 644
January 2004	17 387 394	190% Lines/day 28443
July 2004	23 014 683	284% Variation July 02-July 03
October 2004	26 194 876	338% % 111.00%
January 2005	31 326 694	423% New lines 6 645 811
July 2005	38 795 492	548% Lines/day 18208

Variation lines/day: 52%

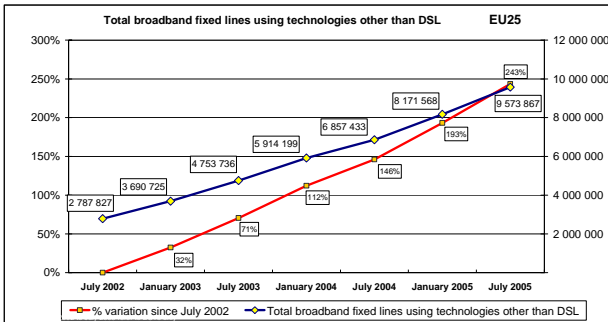


	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	523 619	627 970	765 183	889 294	996 118	1 113 641
CZ			21 000	36 000	106 000	181 000
DK	306 944	390 692	473 359	562 009	638 961	714 529
DE	3 185 015	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941
EE		37 558	37 558	50 906	64 628	75 133
EL	93	359	8 588	22 937	46 547	91 869
ES	957 204	1 297 563	1 676 466	2 086 172	2 604 067	3 268 602
FR	1 406 769	2 099 933	3 262 800	4 490 487	6 293 249	7 802 442
IE	3 287	5 369	24 400	57 445	115 583	144 376
IT	835 525	1 387 658	2 158 458	3 223 188	4 402 585	5 175 270
CY		10 033	10 033	14 490	17 994	17 994
LV				26 815	39 281	49 465
LT		15 444	26 438	34 074	50 688	69 804
LU	6 858	8 960	13 860	22 128	32 607	47 048
HU			117 369	165 980	239 810	297 237
MT				11 426	22 145	23 798
NL	413 861	679 508	978 044	1 374 129	1 884 561	2 204 067
AT	179 600	224 650	279 600	355 725	442 075	525 230
PL			80 239	108 901	410 186	532 284
PT	52 810	107 537	184 860	293 435	424 169	576 258
SI			38 330	53 840	74 922	95 932
SK			4 210	9 900	38 334	64 539
FI	215 200	271 000	328 704	400 000	585 650	763 283
SE	439 800	495 300	595 200	686 200	883 200	1 038 747
UK	590 278	1 099 518	1 804 609	2 753 061	4 203 651	5 784 002
EU 15	9 116 863	12 580 037	17 052 217	22 502 351	30 262 706	37 388 305
EU10	53 002	335 177	512 332	1 063 988	1 407 187	1 407 187
EU25	9 169 865	12 915 214	17 564 549	23 566 339	31 670 893	38 795 492

	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	July 2003 - July 2004			July 2004 - July 2005		
BE	261 324	42%	716	224 347	25%	615
CZ				145 000	403%	397
DK	171 317	44%	469	152 520	27%	418
DE	1 402 121	36%	3 841	2 852 800	54%	7 816
EE				24 227	48%	66
EL	22 578	6289%	62	68 932	301%	189
ES	788 609	61%	2 161	1 182 430	57%	3 240
FR	2 390 554	114%	6 549	3 311 955	74%	9 074
IE	52 076	970%	143	86 931	151%	238
IT	1 835 530	132%	5 029	1 952 082	61%	5 348
CY				3 504	24%	10
LV				22 650	84%	62
LT				35 730	105%	98
LU	13 168	147%	36	24 920	113%	68
HU				131 257	79%	360
MT				12 373	108%	34
NL	694 621	102%	1 903	829 938	60%	2 274
AT	131 075	58%	359	169 505	48%	464
PL				423 383	389%	1 160
PT	185 898	173%	509	282 823	96%	775
SI				42 092	78%	115
SK				54 639	552%	150
FI	129 000	48%	353	363 283	91%	995
SE	190 900	39%	523	352 547	51%	966
UK	1 653 543	150%	4 530	3 030 941	110%	8 304
EU 15	9 922 314	79%	27 184	14 885 954	66%	40 783
EU10	53 002			894 855	175%	2 452
EU25	10 455 316	79%	27 184	15 780 809	69%	43 235

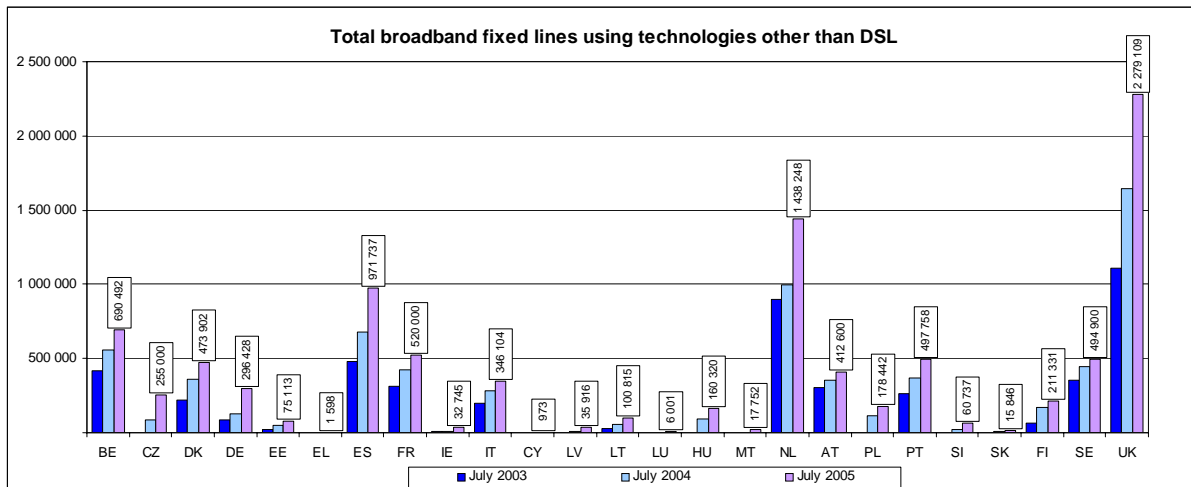
Broadband access in the EU as at 1 July 2005

Total broadband fixed retail lines using technologies other than DSL in EU25



Total broadband lines using technologies other than DSL	% variation since July 2002	Variation July 04-July 05
July 2002	2 787 827	% 39.61%
October 2002	3 224 999	16%
January 2003	3 690 725	32%
July 2003	4 753 736	71%
October 2003	5 008 804	80%
January 2004	5 914 199	112%
July 2004	6 857 433	146%
October 2004	7 243 837	160%
January 2005	8 171 568	193%
July 2005	9 573 867	243%

Variation lines/day: 29.1%

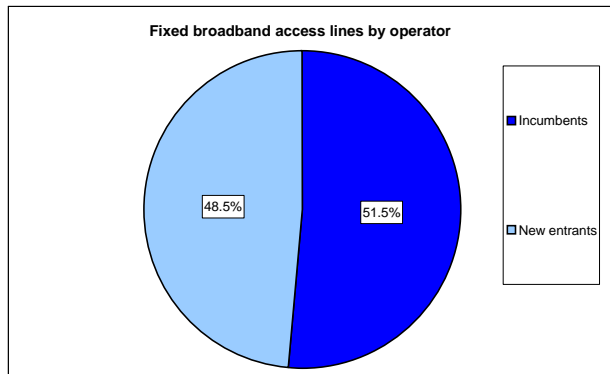


	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	353 745	417 897	479 553	555 379	623 638	690 492
CZ			80 000	85 000	122 200	255 000
DK	152 729	215 765	254 547	359 468	400 417	473 902
DE	59 415	87 262	169 371	129 106	195 476	296 428
EE		20 957	20 957	51 865	73 989	75 113
EL	1 596	1 787	1 418	2 994	4 901	1 598
ES	347 566	478 855	551 703	681 455	848 639	971 737
FR	249 519	313 707	393 854	425 000	500 000	520 000
IE	4 100	4 100	9 650	10 085	22 533	32 745
IT	140 494	198 536	243 481	280 309	298 647	346 104
CY			30	30	973	973
LV				7 089	17 167	35 916
LT		27 074	38 544	54 205	78 365	100 915
LU	597	1 322	2 082	3 206	4 412	6 001
HU			69 859	91 036	125 931	160 320
MT				2 312	15 909	17 752
NL	800 000	900 000	930 000	998 400	1 200 000	1 438 248
AT	272 200	302 400	333 000	352 000	385 600	412 600
PL			93 000	111 000	126 551	178 442
PT	207 486	262 339	315 577	370 610	439 897	497 758
SI			22 068	22 499	43 109	60 737
SK			4 065	4 585	13 535	15 846
FI	54 500	63 950	118 740	172 100	194 279	211 331
SE	304 000	351 800	415 200	445 200	501 900	494 900
UK	742 778	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109
EU 15	3 690 725	4 705 705	5 585 676	6 427 812	7 553 839	8 672 953
EU10		48 031	328 523	429 621	617 729	900 914
EU25		4 753 736	5 914 199	6 857 433	8 171 568	9 573 867

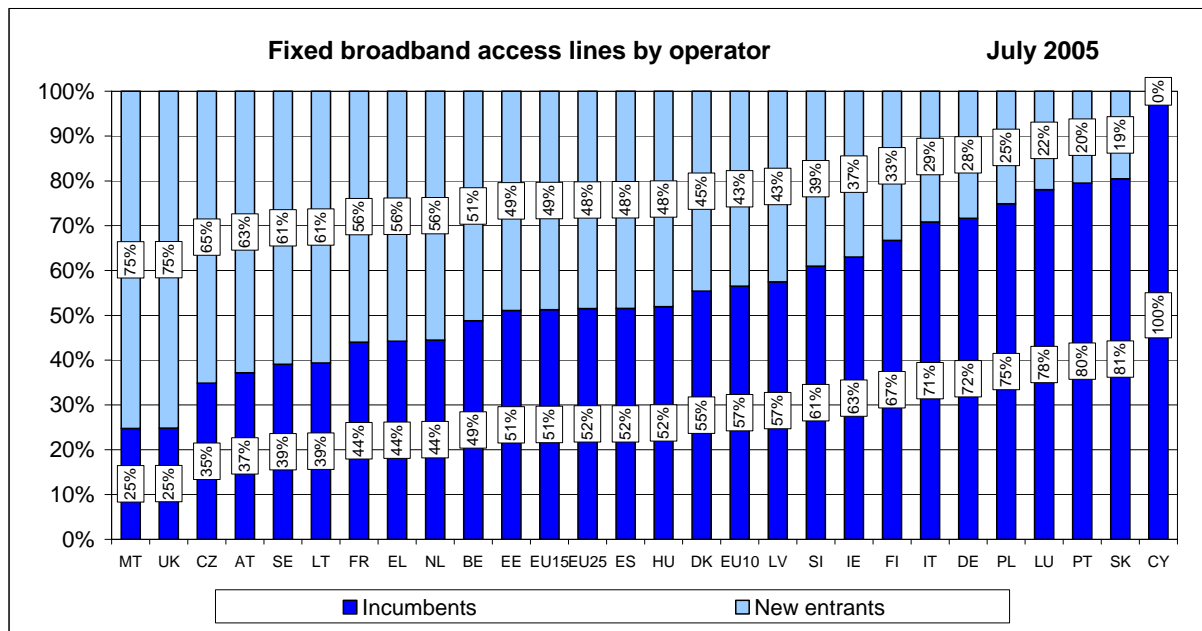
	July 2003 - July 2004			July 2004 - July 2005		
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
BE	137 482	33%	377	135 113	24%	370
CZ				170 000	200%	466
DK	143 703	67%	394	114 434	32%	314
DE	41 844	48%	115	167 322	130%	458
EE				23 248	45%	64
EL	1 207	68%	3	- 1 396	-47%	- 4
ES	202 600	42%	555	290 282	43%	795
FR	111 293	35%	305	95 000	22%	260
IE	5 985	146%	16	22 660	225%	62
IT	81 773	41%	224	65 795	23%	180
CY				943	3143%	3
LV				28 827	407%	79
LT				46 610	86%	128
LU	1 884	143%	5	2 795	87%	8
HU				69 284	76%	190
MT				15 440	668%	42
NL	98 400	11%	270	439 848	44%	1 205
AT	49 600	16%	136	60 600	17%	166
PL				67 442	61%	185
PT	108 271	41%	297	127 148	34%	348
SI				38 238	170%	105
SK				11 261	246%	31
FI	108 150	169%	296	39 231	23%	107
SE	93 400	27%	256	49 700	11%	136
UK	536 515	49%	1 470	636 609	39%	1 744
EU 15	1 722 107	37%	4 718	2 245 141	35%	6 151
EU10				471 293	110%	1 291
EU25				2 716 434	40%	7 442

Broadband access in the EU as at 1 July 2005

Fixed broadband access lines by operator in EU25



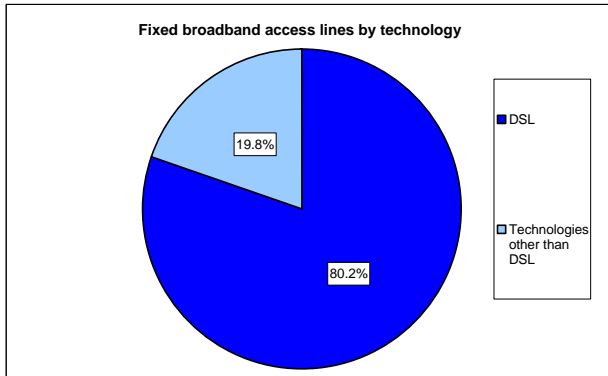
Fixed broadband access lines by operator		
	Incumbents	New entrants
July 2005	51.5%	48.5%



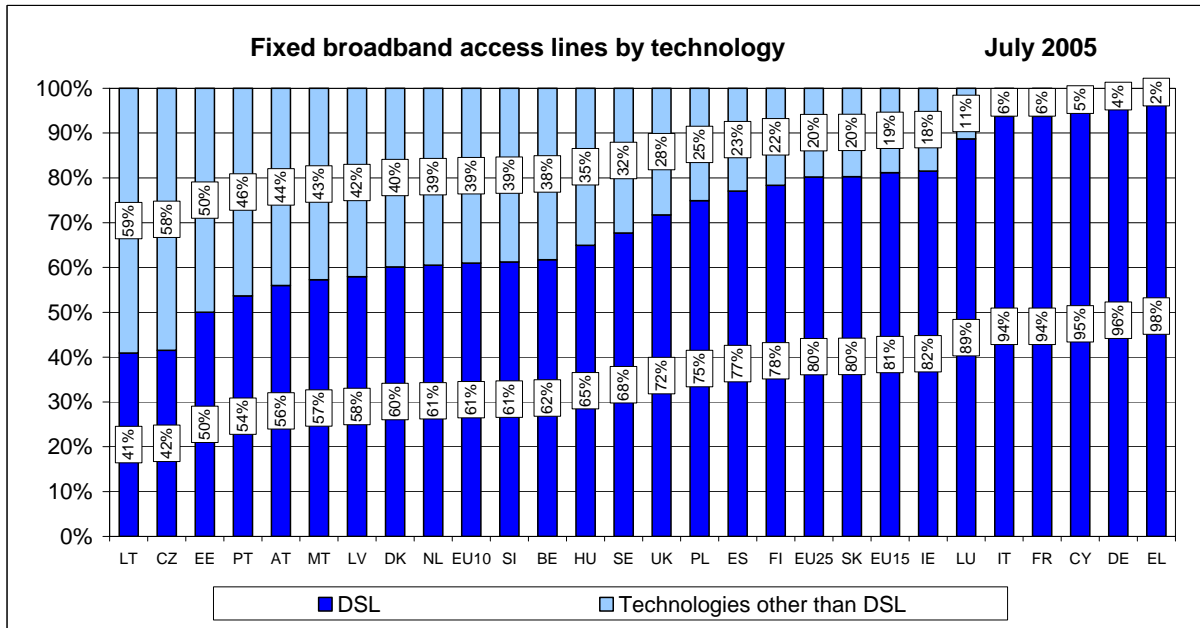
	Incumbents	New entrants
BE	49%	51%
CZ	35%	65%
DK	55%	45%
DE	72%	28%
EE	51%	49%
EL	44%	56%
ES	52%	48%
FR	44%	56%
IE	63%	37%
IT	71%	29%
CY	100%	0%
LV	57%	43%
LT	39%	61%
LU	78%	22%
HU	52%	48%
MT	25%	75%
NL	44%	56%
AT	37%	63%
PL	75%	25%
PT	80%	20%
SI	61%	39%
SK	81%	19%
FI	67%	33%
SE	39%	61%
UK	25%	75%
EU15	51%	49%
EU10	57%	43%
EU25	52%	48%

Broadband access in the EU as at 1 July 2005

Fixed broadband access lines by technology in EU25



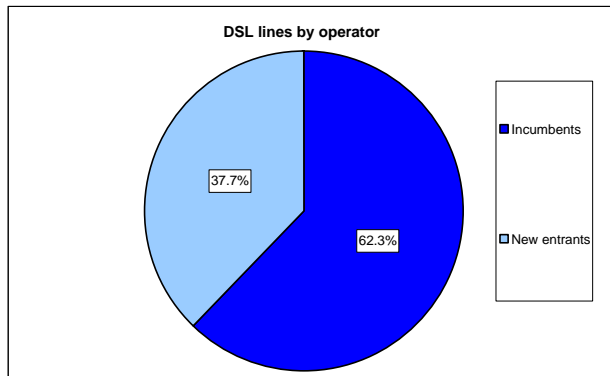
Fixed broadband access lines by technology		
	DSL	Technologies other than DSL
July 2005	80.2%	19.8%



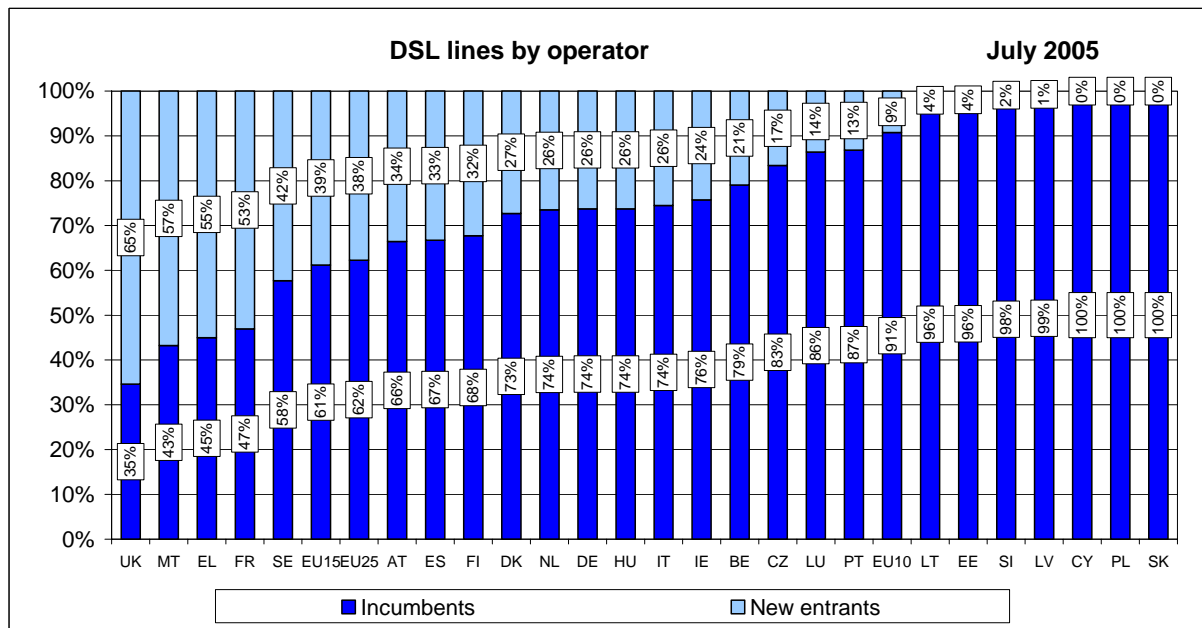
	DSL	Technologies other than DSL
BE	62%	38%
CZ	42%	58%
DK	60%	40%
DE	96%	4%
EE	50%	50%
EL	98%	2%
ES	77%	23%
FR	94%	6%
IE	82%	18%
IT	94%	6%
CY	95%	5%
LV	58%	42%
LT	41%	59%
LU	89%	11%
HU	65%	35%
MT	57%	43%
NL	61%	39%
AT	56%	44%
PL	75%	25%
PT	54%	46%
SI	61%	39%
SK	80%	20%
FI	78%	22%
SE	68%	32%
UK	72%	28%
EU15	81%	19%
EU10	61%	39%
EU25	80%	20%

Broadband access in the EU as at 1 July 2005

DSL access lines by operator in EU25



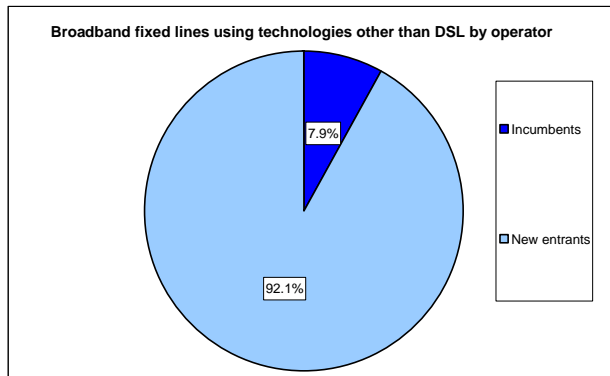
DSL lines by operator		
	Incumbents	New entrants
July 2005	62.3%	37.7%



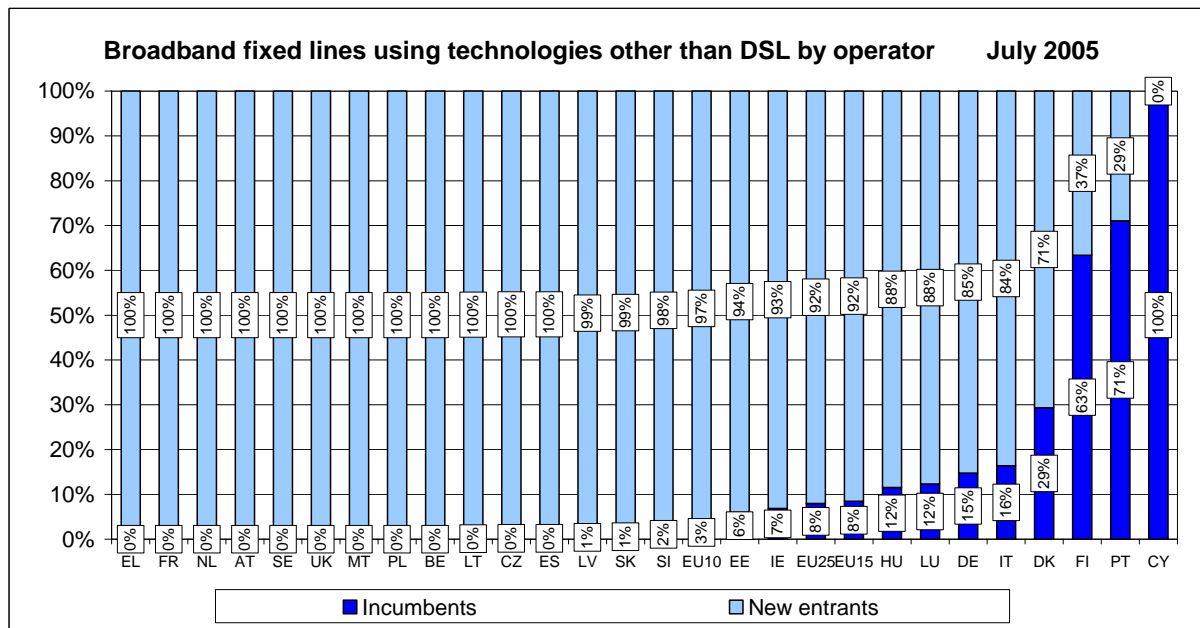
	Incumbents	New entrants
BE	79%	21%
CZ	83%	17%
DK	73%	27%
DE	74%	26%
EE	96%	4%
EL	45%	55%
ES	67%	33%
FR	47%	53%
IE	76%	24%
IT	74%	26%
CY	100%	0%
LV	99%	1%
LT	96%	4%
LU	86%	14%
HU	74%	26%
MT	43%	57%
NL	74%	26%
AT	66%	34%
PL	100%	0%
PT	87%	13%
SI	98%	2%
SK	100%	0%
FI	68%	32%
SE	58%	42%
UK	35%	65%
EU15	61%	39%
EU10	91%	9%
EU25	62%	38%

Broadband access in the EU as at 1 July 2005

Broadband fixed lines using technologies other than DSL by operator in EU 25



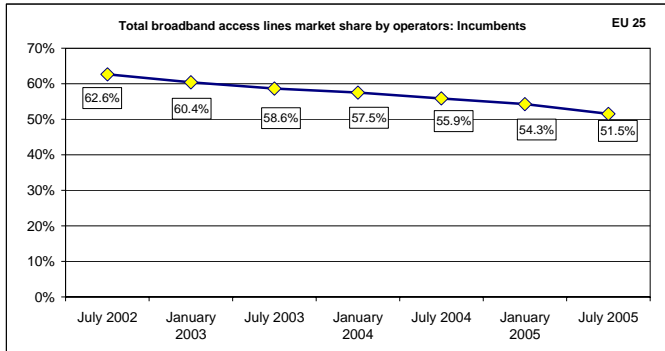
	Broadband fixed lines using technologies other than DSL by operator	
	Incumbents	New entrants
July 2005	7.9%	92.1%



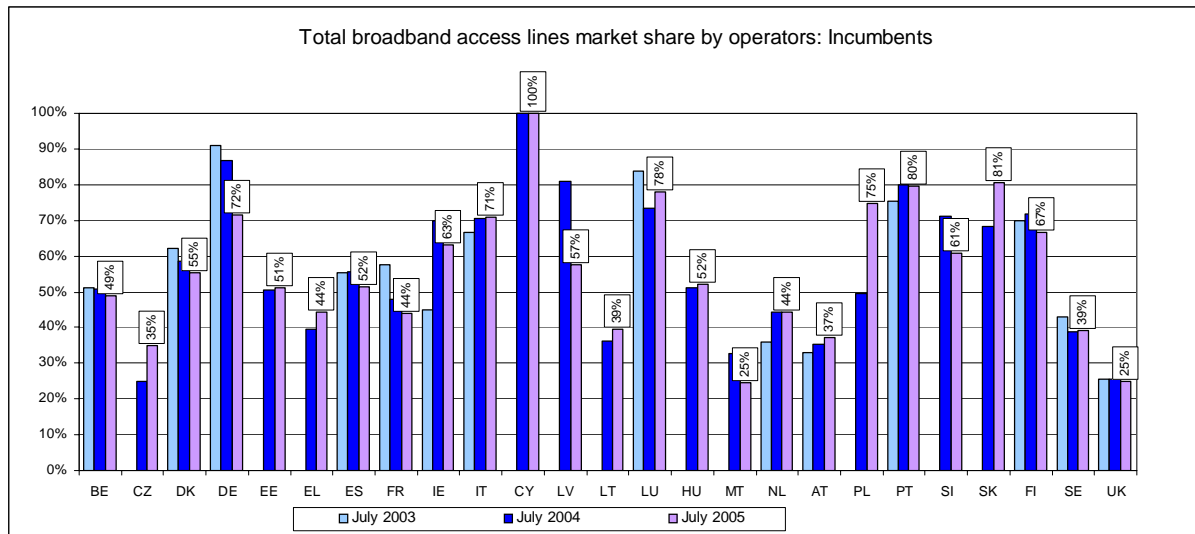
	Incumbents	New entrants
BE	0%	100%
CZ	0%	100%
DK	29%	71%
DE	15%	85%
EE	6%	94%
EL	0%	100%
ES	0%	100%
FR	0%	100%
IE	7%	93%
IT	16%	84%
CY	100%	0%
LV	1%	99%
LT	0%	100%
LU	12%	88%
HU	12%	88%
MT	0%	100%
NL	0%	100%
AT	0%	100%
PL	0%	100%
PT	71%	29%
SI	2%	98%
SK	1%	99%
FI	63%	37%
SE	0%	100%
UK	0%	100%
EU15	8%	92%
EU10	3%	97%
EU25	8%	92%

Broadband access in the EU as at 1 July 2005

Trends in fixed broadband access lines by operator in EU25 - Incumbents



Total broadband access lines market share by operators: Incumbents	Variation since July 2002	Variation in the reporting period
July 2002	62.6%	
October 2002	60.4%	-2.25%
January 2003	60.4%	-2.23%
July 2003	58.6%	-3.97%
October 2003	58.0%	-4.58%
January 2004	57.5%	-5.12%
July 2004	55.9%	-6.76%
October 2004	55.7%	-6.96%
January 2005	54.3%	-8.36%
July 2005	51.5%	-11.12%

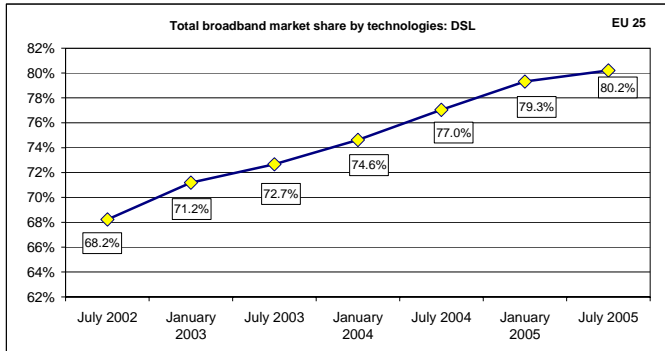


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	48.7%	50.5%	51.1%	53.2%	50.7%	49.6%	48.8%
CZ				14.9%	24.8%	44.3%	34.9%
DK	61.6%	63.7%	62.0%	61.1%	58.5%	58.2%	55.4%
DE	93.9%	92.6%	90.8%	88.0%	86.9%	80.4%	71.6%
EE				65.0%	50.5%	48.4%	51.1%
EL				37.5%	39.5%	38.8%	44.2%
ES	61.4%	56.3%	55.5%	55.8%	55.5%	52.3%	51.5%
FR	72.0%	62.7%	57.5%	54.8%	48.0%	44.7%	44.0%
IE	72.8%	35.8%	44.9%	61.7%	70.0%	65.9%	63.0%
IT	76.5%	64.5%	66.7%	68.9%	70.7%	73.1%	70.8%
CY				100.0%	100.0%	100.0%	100.0%
LV					80.9%	69.6%	57.5%
LT				38.8%	36.2%	36.9%	39.4%
LU		90.5%	83.7%	79.3%	73.5%	77.7%	78.0%
HU				50.2%	51.3%	52.1%	51.9%
MT					32.8%	25.6%	24.7%
NL	19.3%	29.9%	36.1%	40.7%	44.4%	46.1%	44.5%
AT	30.4%	31.7%	33.1%	33.9%	35.2%	36.1%	37.2%
PL				46.3%	49.5%	76.4%	74.9%
PT	66.5%	70.7%	75.2%	78.5%	79.9%	80.9%	79.5%
SI				65.2%	71.0%	63.3%	61.0%
SK				50.9%	68.3%	73.9%	80.5%
FI	72.9%	74.0%	69.9%	73.5%	72.0%	72.3%	66.8%
SE	54.7%	52.7%	43.1%	39.5%	38.8%	38.5%	39.1%
UK	25.5%	22.6%	25.6%	26.4%	25.4%	25.1%	24.8%
EU15	62.6%	60.4%	58.7%	57.8%	56.1%	54.0%	51.3%
EU10				46.1%	49.4%	59.3%	56.5%
EU25				57.5%	55.9%	54.3%	51.5%

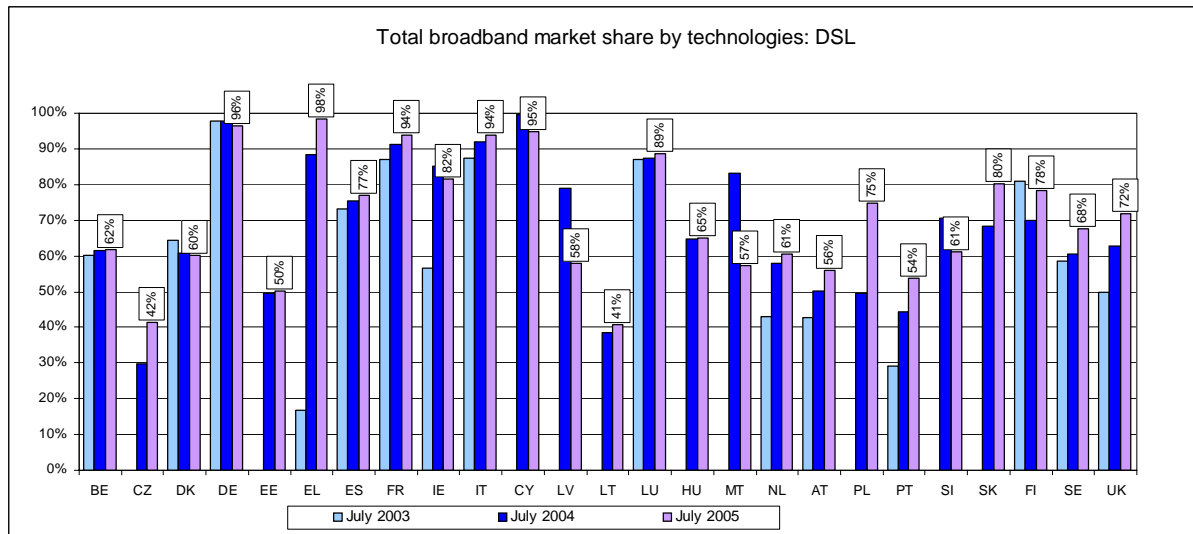
	Variation	
	July 04-05	July 03-05
BE	-2%	-2%
CZ	10%	
DK	-3%	-7%
DE	-15%	-19%
EE	1%	
EL	5%	44%
ES	-4%	-4%
FR	-4%	-13%
IE	-7%	18%
IT	0%	4%
CY		
LV	-23%	
LT	3%	
LU	4%	-6%
HU	1%	
MT	-8%	
NL	0%	8%
AT	2%	4%
PL	25%	
PT	0%	4%
SI	-10%	
SK	12%	
FI	-5%	-3%
SE	0%	-4%
UK	-1%	-1%
EU15	-5%	-7%
EU10	7%	
EU25	-4%	

Broadband access in the EU as at 1 July 2005

Trends in fixed broadband access lines by technology in EU25 - DSL



DSL lines as % of all BB lines	Variation since July 2002	Variation in the reporting period
July 2002	68.2%	
October 2002	68.7%	0.45%
January 2003	71.2%	2.95%
July 2003	72.7%	4.43%
October 2003	74.2%	5.94%
January 2004	74.6%	6.39%
July 2004	77.0%	8.81%
October 2004	78.3%	10.11%
January 2005	79.3%	11.08%
July 2005	80.2%	11.98%

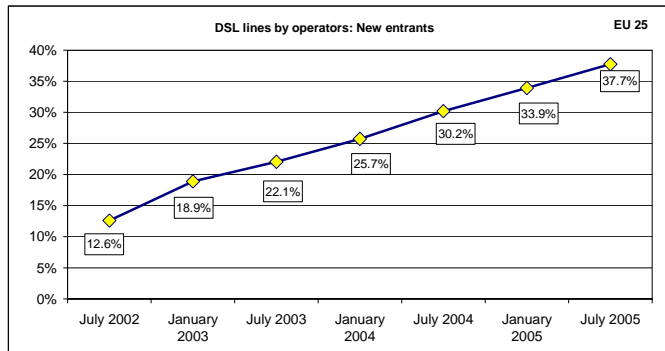


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	58.0%	59.7%	60.0%	61.5%	61.6%	61.5%	61.7%
CZ				20.8%	29.8%	46.5%	41.5%
DK	62.7%	66.8%	64.4%	65.0%	61.0%	61.5%	60.1%
DE	98.4%	98.2%	97.8%	96.4%	97.6%	97.2%	96.5%
EE				64.2%	49.5%	46.6%	50.0%
EL	20.7%	5.5%	16.7%	85.8%	88.5%	90.5%	98.3%
ES	79.0%	73.4%	73.0%	75.2%	75.4%	75.4%	77.1%
FR	71.5%	84.9%	87.0%	89.2%	91.4%	92.6%	93.8%
IE	73.7%	44.5%	56.7%	71.7%	85.1%	83.7%	81.5%
IT	88.8%	85.6%	87.5%	89.9%	92.0%	93.6%	93.7%
CY				99.7%	99.8%	94.9%	94.9%
LV					79.1%	69.6%	57.9%
LT				40.7%	38.6%	39.3%	40.9%
LU		92.0%	87.1%	86.9%	87.3%	88.1%	88.7%
HU				62.7%	64.6%	65.6%	65.0%
MT					83.2%	58.2%	57.3%
NL	21.3%	34.1%	43.0%	51.3%	57.9%	61.1%	60.5%
AT	37.0%	39.8%	42.6%	45.6%	50.3%	53.4%	56.0%
PL				46.3%	49.5%	76.4%	74.9%
PT	3.7%	20.3%	29.1%	36.9%	44.2%	49.1%	53.7%
SI				63.5%	70.5%	63.5%	61.2%
SK				50.9%	68.3%	73.9%	80.3%
FI	73.7%	79.8%	80.9%	73.5%	69.9%	75.1%	78.3%
SE	60.7%	59.1%	58.5%	60.7%	63.8%	63.8%	67.7%
UK	41.0%	44.3%	49.9%	56.9%	62.6%	68.5%	71.7%
EU15	68.2%	71.2%	72.8%	75.3%	77.8%	80.0%	81.2%
EU10				50.5%	54.4%	63.3%	61.0%
EU25	68.2%	71.2%	72.7%	74.6%	77.0%	79.3%	80.2%

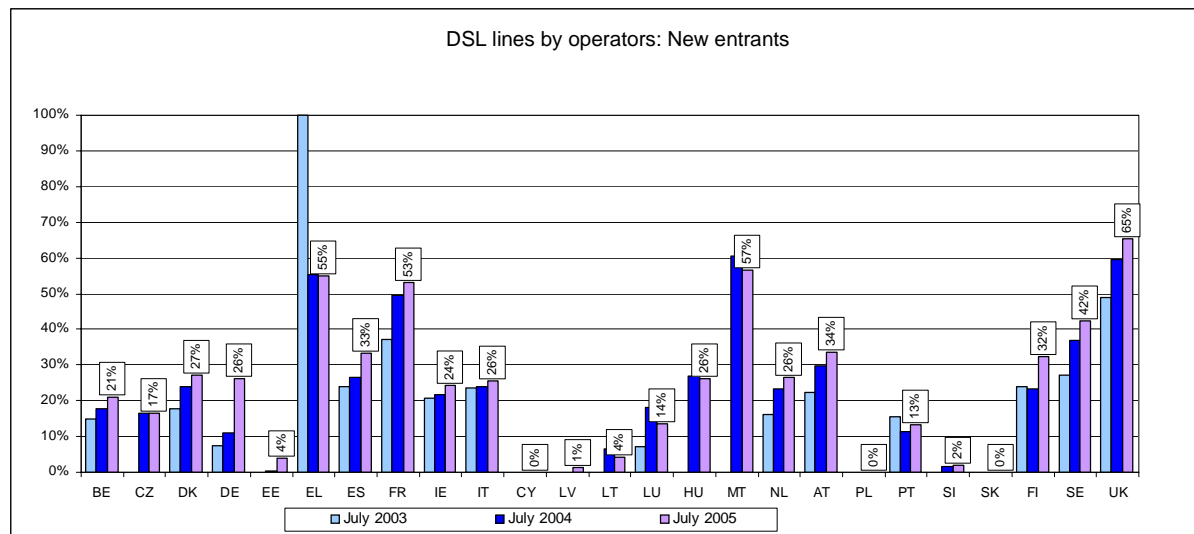
	Variation	
	July 04-05	July 03-05
BE	0%	2%
CZ	12%	
DK	-1%	-4%
DE	-1%	-1%
EE	0%	
EL	10%	82%
ES	2%	4%
FR	2%	7%
IE	-4%	25%
IT	2%	6%
CY	-5%	
LV	-21%	
LT	2%	
LU	1%	2%
HU	0%	
MT	-26%	
NL	3%	17%
AT	6%	13%
PL	25%	
PT	9%	25%
SI	-9%	
SK	12%	
FI	8%	-3%
SE	7%	9%
UK	9%	22%
EU15	3%	8%
EU10	7%	
EU25	3%	

Broadband access in the EU as at 1 July 2005

Trends in DSL access lines by operator in EU25 – New entrants



DSL lines by operator: New entrants	Variation since July 2002	Variation in the reporting period
July 2002	12.6%	
October 2002	16.3%	3.67%
January 2003	18.9%	6.31%
July 2003	22.1%	9.46%
October 2003	24.4%	11.79%
January 2004	25.7%	13.15%
July 2004	30.2%	17.61%
October 2004	31.5%	18.87%
January 2005	33.9%	21.32%
July 2005	37.7%	25.15%

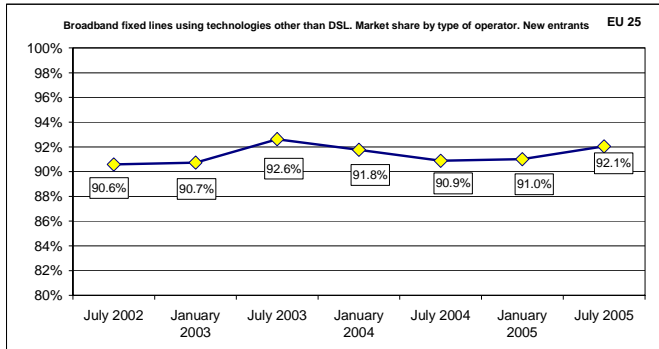


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	16.2%	15.5%	15.0%	13.5%	17.7%	19.3%	20.9%
CZ				28.6%	16.7%	5.7%	16.6%
DK	20.5%	18.9%	17.7%	21.3%	24.0%	25.2%	27.3%
DE	4.6%	5.8%	7.3%	8.9%	11.1%	17.3%	26.3%
EE				0.1%	0.2%	0.1%	3.9%
EL	100.0%	100.0%	100.0%	56.3%	55.3%	57.1%	55.0%
ES	22.3%	23.3%	24.1%	25.8%	26.4%	30.7%	33.3%
FR	8.4%	29.8%	37.1%	41.1%	49.4%	53.4%	53.1%
IE	1.3%	19.5%	20.9%	23.7%	21.7%	23.2%	24.3%
IT	13.9%	24.6%	23.8%	23.5%	23.8%	22.5%	25.5%
CY							
LV						0.7%	1.4%
LT				5.1%	6.6%	6.4%	4.1%
LU		4.3%	7.3%	11.4%	18.2%	14.4%	13.6%
HU				27.2%	27.0%	26.9%	26.3%
MT					60.5%	60.0%	56.8%
NL	9.7%	12.3%	16.2%	20.6%	23.4%	24.5%	26.5%
AT	17.8%	20.3%	22.4%	25.7%	29.9%	32.5%	33.6%
PL							
PT	3.8%	17.3%	15.6%	13.1%	11.3%	9.7%	13.2%
SI				1.1%	1.7%	1.7%	1.8%
SK							
FI	15.4%	18.2%	24.0%	22.0%	23.4%	24.9%	32.3%
SE	26.1%	27.9%	27.3%	33.8%	36.8%	40.4%	42.3%
UK	38.1%	49.3%	48.8%	53.8%	59.5%	63.4%	65.4%
EU15	12.6%	18.9%	22.1%	26.0%	30.6%	34.8%	38.8%
EU10				11.9%	11.9%	8.2%	9.2%
EU25				25.7%	30.2%	33.9%	37.7%

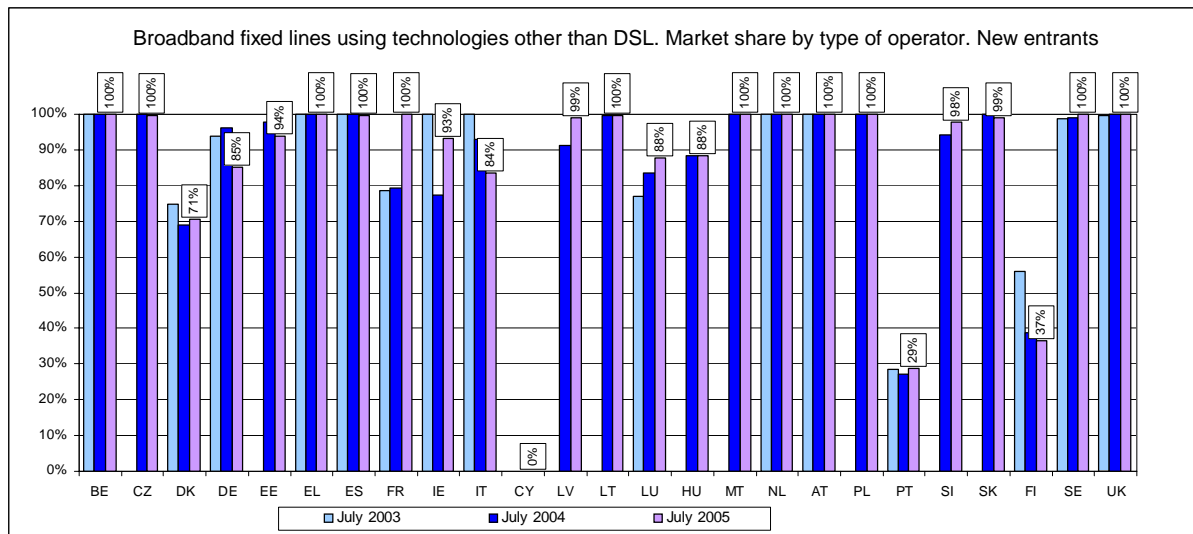
	Variation	
	July 04-05	July 03-05
BE	3%	6%
CZ	0%	
DK	3%	10%
DE	15%	19%
EE	4%	
EL	0%	-45%
ES	7%	9%
FR	4%	16%
IE	3%	3%
IT	2%	2%
CY		
LV	1%	
LT	-3%	
LU	-5%	6%
HU	-1%	
MT	-4%	
NL	3%	10%
AT	4%	11%
PL		
PT	2%	-2%
SI	0%	
SK		
FI	9%	8%
SE	6%	15%
UK	6%	17%
EU15	8%	17%
EU10	-3%	
EU25	8%	

Broadband access in the EU as at 1 July 2005

Trends in broadband fixed lines using technologies other than DSL by operator in EU 25



Broadband lines using technologies other than DSL: New entrants	Variation since July 2002	Variation in the reporting period
July 2002	90.6%	
October 2002	90.9%	0.26%
January 2003	90.7%	0.14%
July 2003	92.6%	2.03%
October 2003	92.4%	1.85%
January 2004	91.8%	1.17%
July 2004	90.9%	0.29%
October 2004	90.8%	0.25%
January 2005	92.1%	1.46%

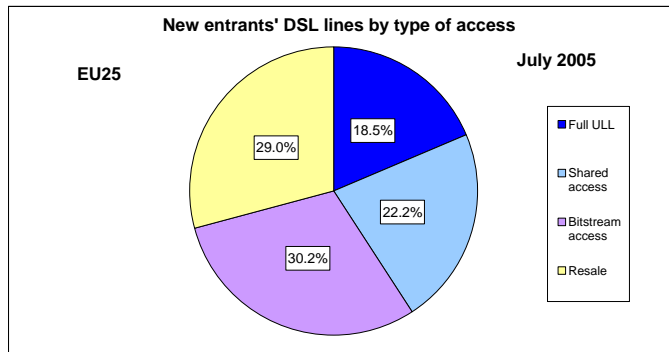


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005
BE	99.7%	99.7%	100.0%	100.0%	100.0%	100.0%	100.0%
CZ				100.0%	100.0%	99.2%	99.6%
DK	68.3%	71.3%	74.8%	71.6%	68.8%	68.4%	70.7%
DE	100.0%	91.2%	94.0%	96.9%	96.2%	97.8%	85.2%
EE				97.7%	97.9%	96.6%	94.0%
EL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
ES	100.0%	100.0%	100.0%	99.9%	99.9%	99.7%	99.6%
FR	77.3%	79.6%	78.7%	79.3%	79.3%	80.0%	100.0%
IE	99.7%	100.0%	100.0%	75.1%	77.2%	89.8%	93.1%
IT	99.5%	100.0%	99.9%	99.1%	92.8%	91.3%	83.6%
CY							
LV					91.4%	98.2%	99.1%
LT				99.7%	99.7%	99.8%	99.8%
LU		68.5%	77.1%	82.5%	83.5%	80.9%	87.7%
HU				87.7%	88.4%	88.0%	88.4%
MT					100.0%	100.0%	100.0%
NL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
AT	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
PL				100.0%	100.0%	100.0%	100.0%
PT	34.6%	32.4%	28.5%	26.5%	27.1%	28.1%	28.9%
SI				93.3%	94.2%	97.4%	97.8%
SK				100.0%	100.0%	100.0%	98.9%
FI	60.0%	56.8%	56.1%	39.1%	38.9%	36.3%	36.7%
SE	74.9%	75.3%	98.6%	98.8%	98.9%	98.6%	100.0%
UK	99.9%	99.8%	99.8%	99.8%	99.8%	99.9%	100.0%
EU15	90.6%	90.7%	92.6%	91.5%	90.5%	90.6%	91.5%
EU10				96.7%	96.8%	96.6%	97.0%
EU25				91.8%	90.9%	91.0%	92.1%

	Variation	
	July 04-05	July 03-05
BE	0%	0%
CZ	0%	
DK	2%	-4%
DE	-11%	-9%
EE	-4%	
EL		
ES	0%	0%
FR	21%	21%
IE	16%	-7%
IT	-9%	-16%
CY		
LV	8%	
LT	0%	
LU	4%	11%
HU	0%	
MT		
NL		
AT		
PL		
PT	2%	0%
SI	4%	
SK	-1%	
FI	-2%	-19%
SE	1%	1%
UK	0%	0%
EU15	1%	-1%
EU10	0%	
EU25	1%	

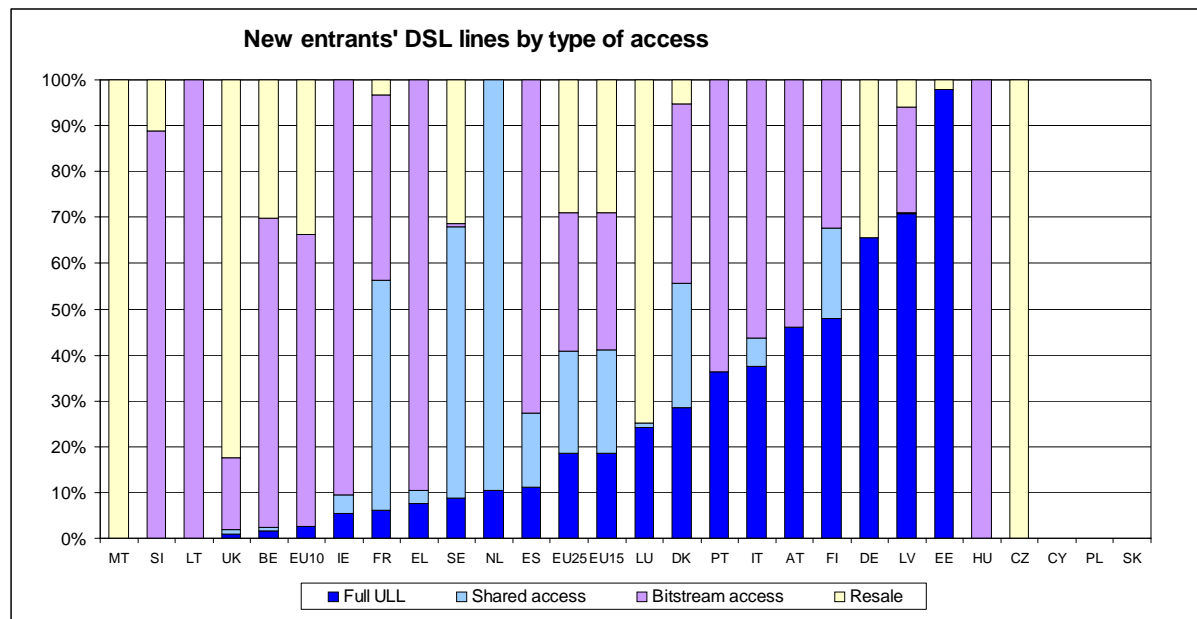
Broadband access in the EU as at 1 July 2005

New entrants DSL lines by access type in EU 25



July 2005	
Full ULL	18.5%
Shared access	22.2%
Bitstream access	30.2%
Resale	29.1%

Total LLU	40.7%
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	Full ULL	Shared access	Bitstream access	Resale
BE	1.7%	0.8%	67.3%	30.2%
CZ				100%
DK	28%	27%	39%	5%
DE	65%	0%	0%	34%
EE	98%	0%	0%	2%
EL	8%	3%	90%	0%
ES	11%	16%	73%	0%
FR	6%	50%	40%	3%
IE	5%	4%	91%	0%
IT	38%	6%	56%	0%
CY				
LV	71%	0%	23%	6%
LT	0%	0%	100%	0%
LU	24%	1%	0%	75%
HU			100%	0%
MT	0%	0%	0%	100%
NL	10%	90%	0%	0%
AT	46%	0%	54%	0%
PL				
PT	36%	0%	64%	0
SI	0%	0%	89%	11%
SK				
FI	48%	20%	32%	0%
SE	9%	59%	1%	31%
UK	1%	1%	16%	82%
EU15	19%	22%	30%	29%
EU10	3%	0%	64%	34%
EU25	19%	22%	30%	29%

Data on national population used in this report

	2002	2003	2004 & 2005
BE	10309700	10355800	10396000 (p)
CZ	10206400	10203300	10211500
DK	5368400	5383500	5397600
DE	82440300	82536700	82531700 (e)
EE	1361200	1356000	1350600 (p)
EL	10988000	11006400 (p)	11041100 (p)
ES	40850500	41550600 (p)	42345300 (p)
FR	59342100	59635000	59900700
IE	3899900	3963600	4027500 (e)
IT	56993700	57321100	57888200 (e)
CY	705500	715100	730400 (p)
LV	2345800	2331500	2319200
LT	3475600	3462600	3445900 (p)
LU	444100	448300	451600
HU	10174900	10142400	10116700 (p)
MT	394600	397300	399900
NL	16105300	16192600	16258000 (p)
AT	8038900	8082000	8114000 (p)
PL	38632500	38218500	38190600
PT	10329300	10407500	10474700
SI	1994000	1995000	1996400
SK	5379000	5379200	5380100
FI	5194900	5206300	5219700
SE	8909100	8940800	8975700
UK	59139900	59328900 (e)	59651500 (e)
EU 15	378354100	380359100	382673300
EU 10	74669500	74200900	74141300
EU 25	453023600	454560000	456814600

(e) Estimated value

(p) Provisional

Source: Eurostat