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## **COMMUNICATIONS COMMITTEE**

### **Working Document**

**Subject: Broadband access in the EU: situation at 1 July 2006.**

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## Broadband access in the EU as at 1 July 2006

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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 1 July 2006, except for data on incumbent's PSTN activated main lines in case of Greece and United Kingdom and incumbent's access lines by other means – leased lines in case of Cyprus, where data refer to 31 March 2006.

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, 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 68 658 781 fixed broadband lines in the EU as of 1 July 2006, a 16.39% increase since 1 January 2006. Of these lines, 56 021 453 were DSL lines (81.59% of total) and 12 637 328 (18.41%) were provided using other transmission means, mostly cable modem.

Incumbent fixed operators provided 48.1% of these lines, continuing the downward trend recorded since 2003. This figure was 58.7% in July 2003, 55.9% in July 2004 and 51.5% in July 2005.

In the period between July 2005 and July 2006 a total of 20 308 769 new broadband lines were added, an increase of 42.00%. Although in relative terms this growth is lower than in the previous twelve month period (61.86%), in absolute numbers it is higher than the growth recorded between July 2004 and July 2005 (18 478 441 lines).

84.82% of the new lines were by means of xDSL technologies, while only 15.18% were connections using other type of technologies.

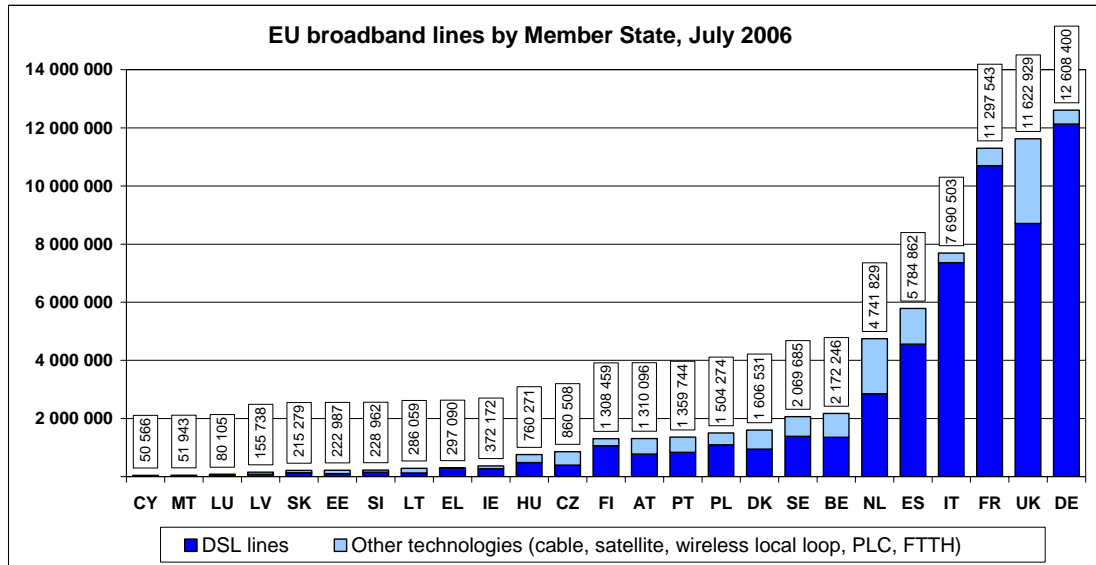
Table 1 shows how the broadband lines in the EU were distributed between the EU Member States at 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005, 1 January 2006 and 1 July 2006.

**Table 1 Retail broadband lines in the EU by country**

	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133	2 010 584	2 172 246
CZ		101 000	121 000	228 200	436 000	650 000	860 508
DK	606 457	727 906	921 477	1 039 378	1 188 431	1 337 587	1 606 531
DE	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369	10 558 100	12 608 400
EE	58 515	58 515	102 771	138 617	150 246	179 104	222 987
EL	2 155	10 483	25 386	51 455	93 583	160 113	297 090
ES	1 776 418	2 228 169	2 767 627	3 452 706	4 240 339	5 026 933	5 784 862
FR	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442	9 950 561	11 297 543
IE	9 469	34 050	67 530	138 116	177 121	276 860	372 172
IT	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374	6 896 696	7 690 503
CY		10 063	14 520	18 967	18 967	47 090	50 566
LV			33 904	56 448	85 381	131 329	155 738
LT	42 518	64 982	88 279	129 053	170 619	234 046	286 059
LU	10 282	15 942	25 334	37 019	53 049	70 436	80 105
HU		187 228	257 016	365 741	457 557	619 712	760 271
MT			13 738	38 054	41 551	51 289	51 943
NL	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315	4 113 573	4 741 829
AT	527 050	612 600	707 725	827 675	937 830	1 176 183	1 310 096
PL		173 239	219 901	536 738	710 726	1 015 841	1 504 274
PT	369 876	500 437	664 045	854 130	1 054 553	1 222 301	1 359 744
SI		60 398	76 339	118 031	156 669	196 686	228 962
SK		8 275	14 485	51 869	80 385	137 927	215 279
FI	334 950	447 444	572 100	779 929	974 614	1 171 363	1 308 459
SE	847 100	1 010 400	1 131 400	1 385 100	1 533 647	1 865 676	2 069 685
UK	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111	9 888 626	11 622 929
<b>EU15</b>	<b>17 285 751</b>	<b>22 638 370</b>	<b>28 929 618</b>	<b>37 806 616</b>	<b>46 041 911</b>	<b>55 725 592</b>	<b>64 322 194</b>
<b>EU10</b>	<b>101 033</b>	<b>663 700</b>	<b>941 953</b>	<b>1 681 718</b>	<b>2 308 101</b>	<b>3 263 024</b>	<b>4 336 587</b>
<b>EU25</b>	<b>17 386 784</b>	<b>23 302 070</b>	<b>29 871 571</b>	<b>39 488 334</b>	<b>48 350 012</b>	<b>58 988 616</b>	<b>68 658 781</b>

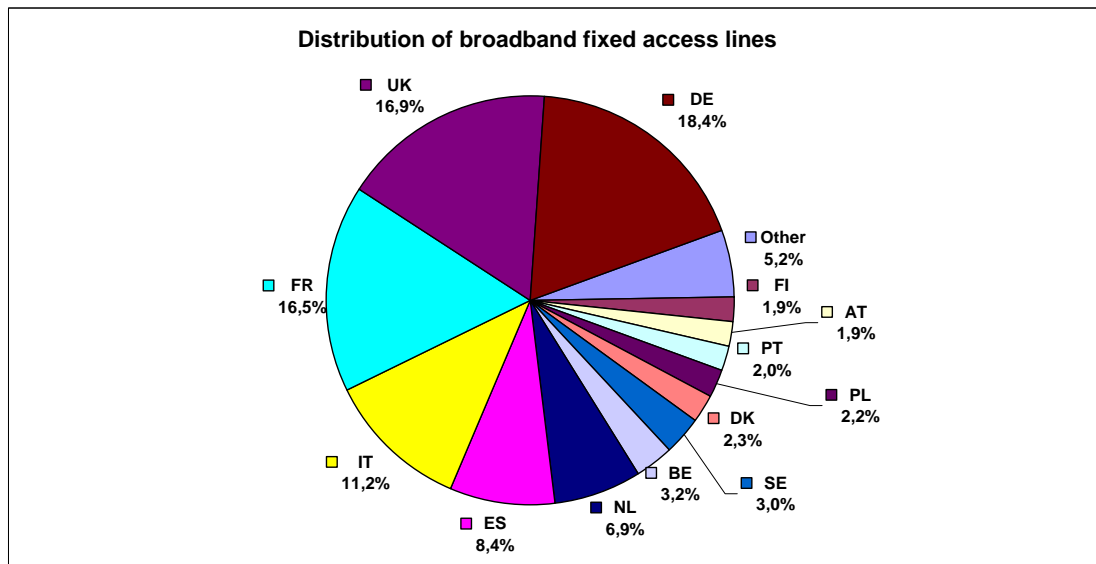
Figure 1 shows the distribution of broadband lines by country, Figure 2 presents this distribution in percentage terms at 1 July 2006, and Figure 3 shows the growth rate since January 2003 (EU15 for January 2003).

**Figure 1 EU countries by number of broadband lines**

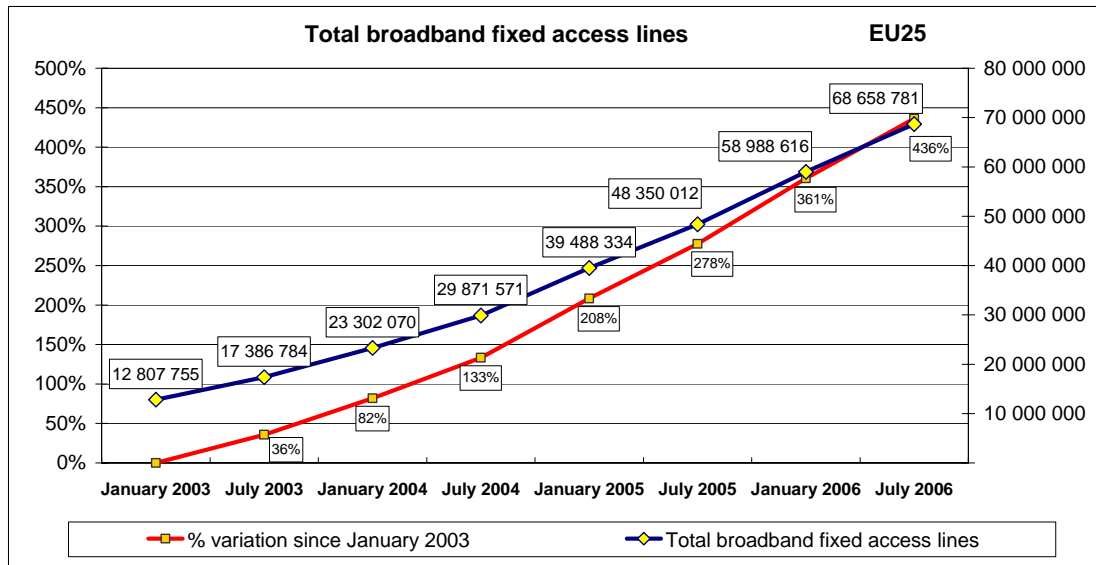


Germany accounts for 18.4% of all broadband lines, followed by the UK and France, with 16.9% and 16.5% respectively. These three countries represent nearly 52% of all EU broadband connections. Italy, Spain and the Netherlands follow. The new Member States contribute 4.3 million broadband lines, which represent 6.32% of the total, 1.54 percentage points up from July 2005.

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



**Figure 3 Growth trend since January 2003**

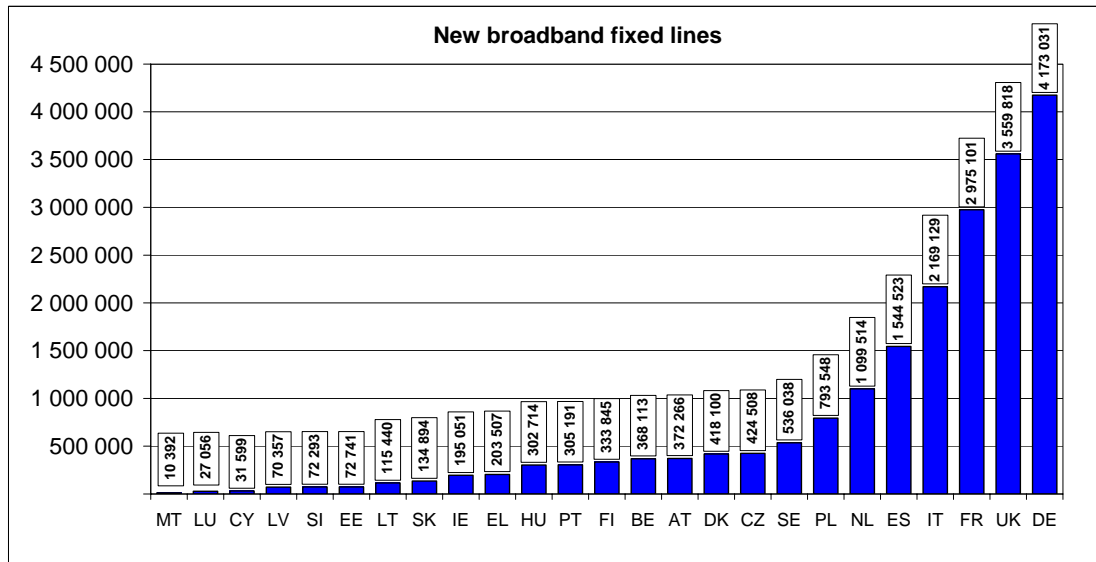


The number of broadband lines added per day in the period between July 2005 and July 2006 was 55 640, i.e. 5 014 more connections per day than the 50 626 new lines per day between July 2004 and July 2005. In other words, in July 2006 there were 9.9% more lines added every day than a year before.

The absolute growth in the first half of 2006 - 9 670 165 lines - was 2<sup>nd</sup> highest biannual increase since January 2003.

Figure 4 shows that Germany replaced the UK as the most dynamic broadband market in the EU in absolute terms, adding 4.17 million new lines in the period between July 2005 and July 2006, while Greece was the most dynamic in relative terms, 217.83% up from July 2005.

**Figure 4 Broadband lines added, by country**



In order to measure the increase in the number of lines relative to the population size, Figure 5 shows the number of new lines per 100 population. As can be seen, Denmark stands out from other MS with 7.7 lines per 100 inhabitants, followed by the Netherlands with 6.7 and Finland with 6.4. A group of 6 countries with less than 6 and around 5 lines per 100 population follows.

**Figure 5 New broadband fixed lines per 100 population**

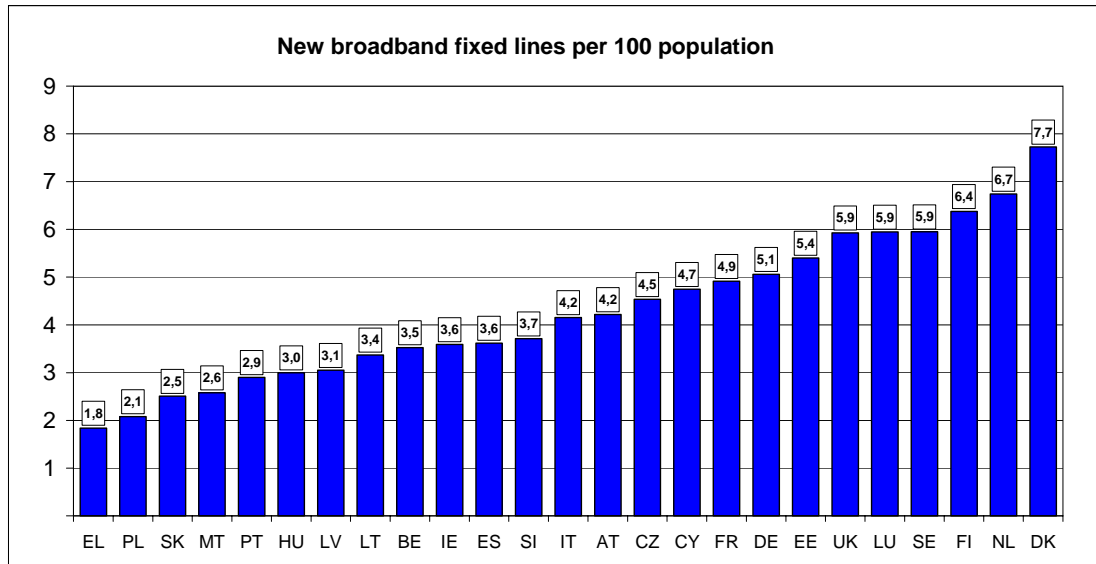


Figure 6 shows the penetration rate of broadband measured as the number of broadband lines per 100 population. Two countries, Denmark and the Netherlands, have almost reached 30% penetration; Finland is close to 25%, Sweden one percentage point lower, while Belgium has exceeded the 20% mark. These countries, along the UK, France and Luxembourg are above the EU15 level penetration rate, which stands at 16.7%, rising from 11.9% in July 2005. At EU25 level the penetration rate is 14.9%, up 4.4 percentage points from 10.5% a year ago. At the EU10 level the penetration rate is 5.9%, up by 2.8 percentage points from July 2005 level, which stood at 3.1%.

**Figure 6 Penetration rate. Lines per 100 population**

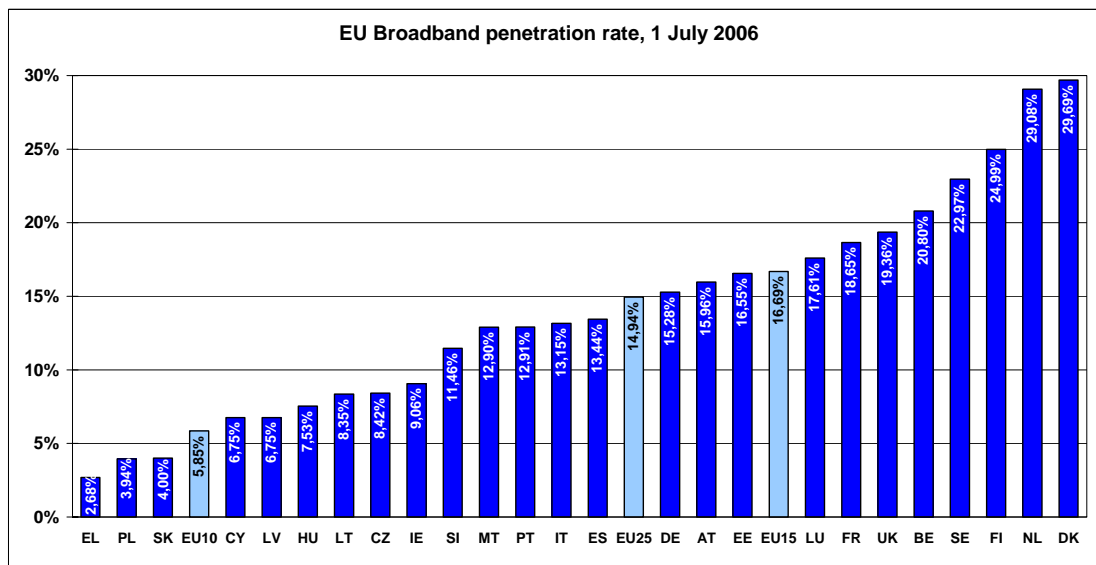


Figure 7 combines the penetration rate as at July 2006 and the growth of this indicator in percentage points during the period between July 2005 and July 2006.

Growth was higher in Denmark and the Netherlands, followed by Finland, Sweden, Luxembourg and the UK. Countries with the growth higher than the EU25 average include also Estonia, Germany, France, Ireland and Austria, while Cyprus and Czech Republic were just below the average.

**Figure 7 Penetration rate and speed of progress**

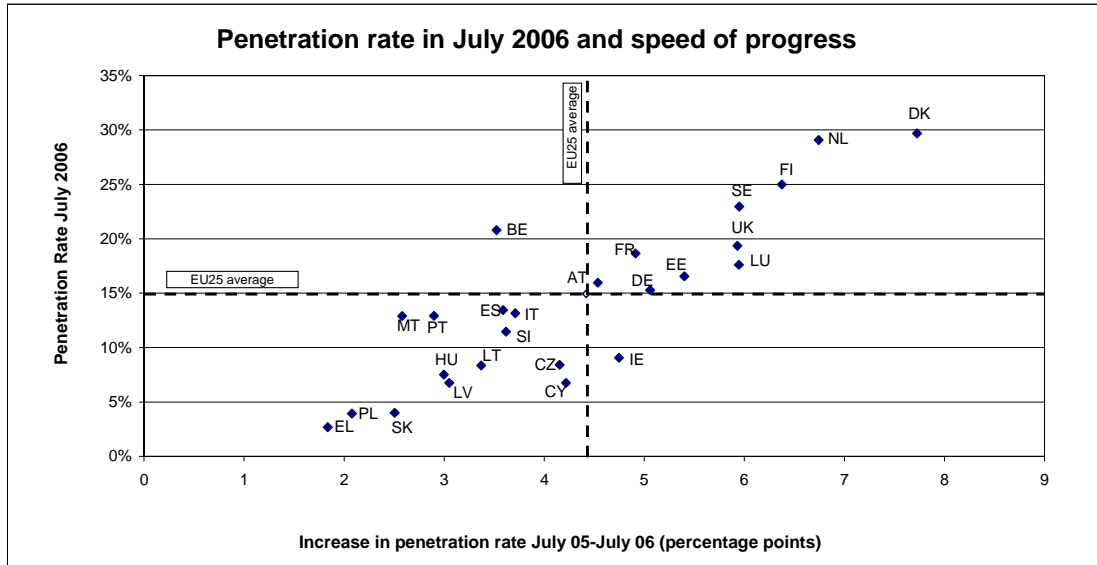
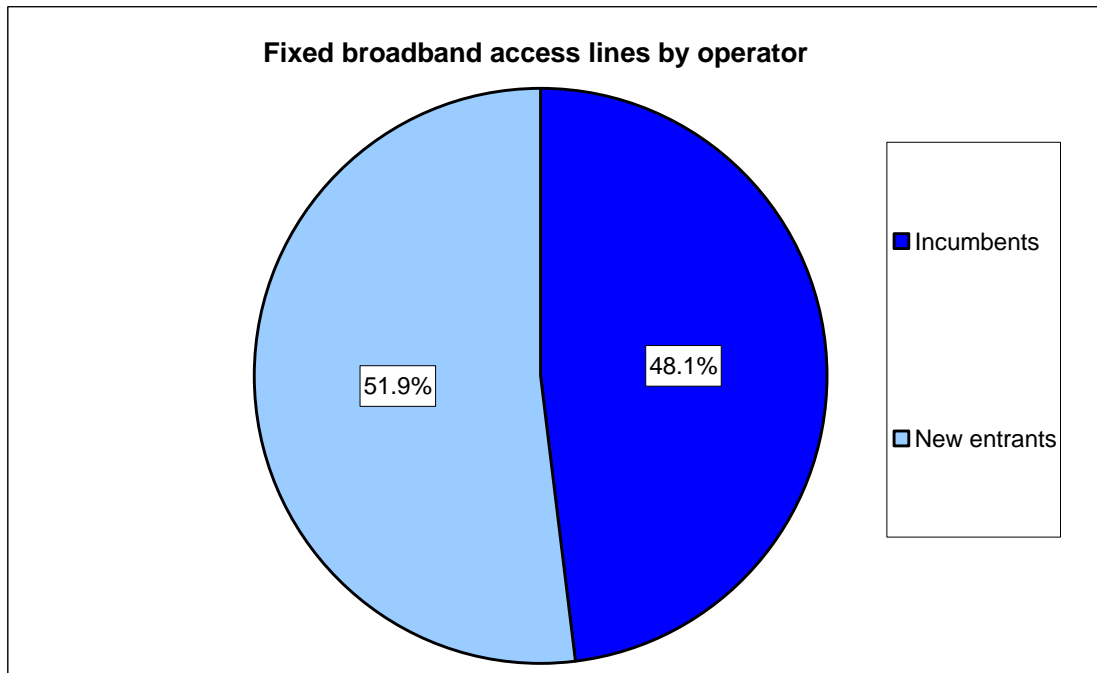
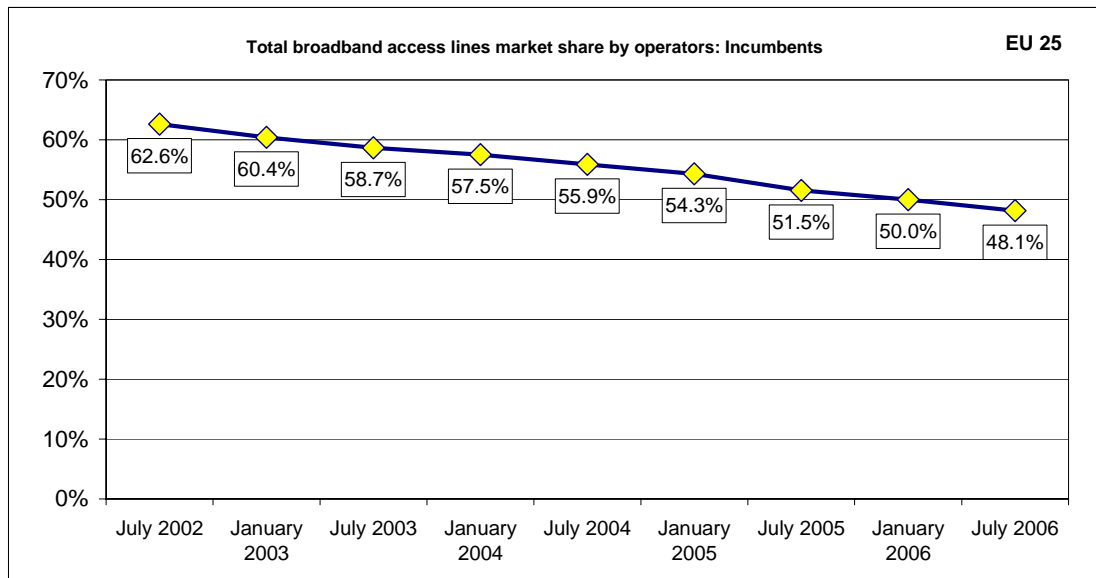


Figure 8 shows the percentage of broadband lines provided by the incumbent fixed operators and by the other operators. Figure 9 displays the trend in the percentage of broadband lines provided by the incumbent fixed operators.

**Figure 8 Broadband lines market share**

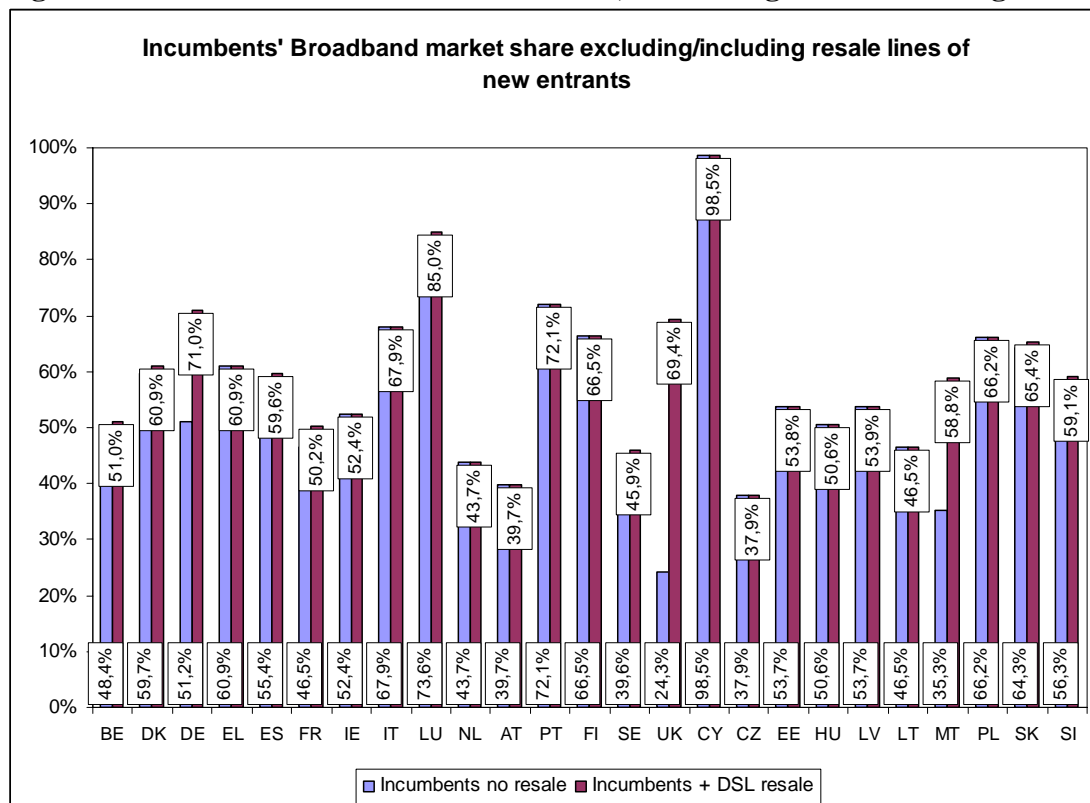


**Figure 9 Trend in the percentage of broadband lines provided by the incumbent fixed operators**



As resale has acquired increasing importance in some Member States, Figure 10 shows how the market share of the incumbent varies excluding or including resale. UK (45.1% points), Malta (23.5% points), Germany (19.8% points) and Luxembourg (11.4% points) are good examples of how the market share can fluctuate using different data to portray the control over (access to) end-users.

**Figure 10 Market shares of incumbents, excluding and including resale**



## DSL lines

There were 56 021 453 DSL lines in the EU as of 1 July 2006, a 44.40% increase since 1 July 2005.

In the period between July 2005 and July 2006 a total of 17 225 961 new DSL lines were added. This represents 1 445 152 more lines than the 15 780 809 new lines installed in the period between July 2004 and July 2005.

Incumbent fixed operators provided 57.3% of these lines, down from 62.3% in July 2005 and 69.8% in July 2004.

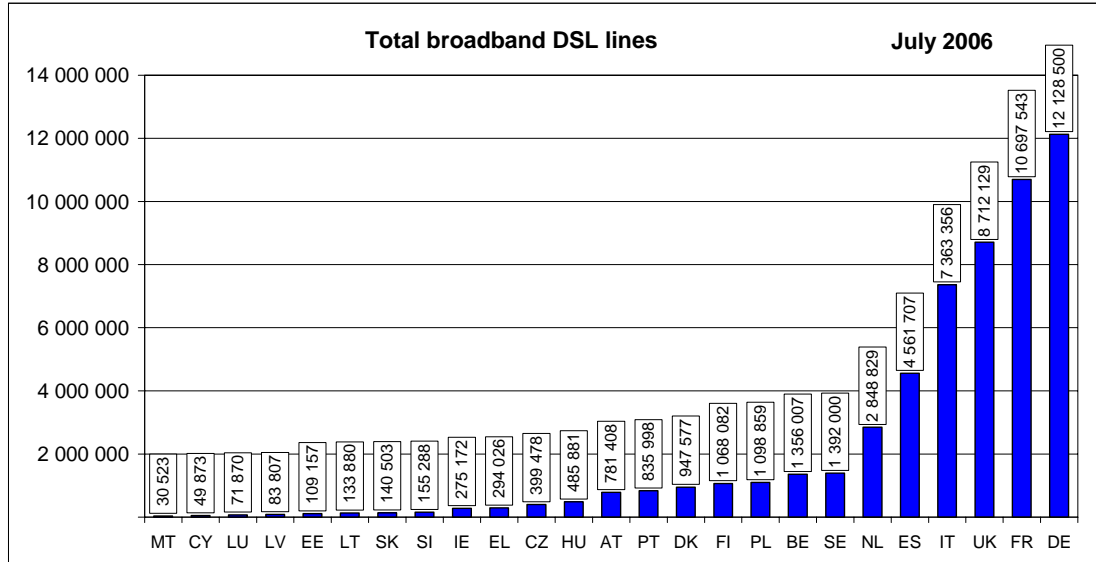
Table 2 shows how the DSL lines in the EU were distributed between the EU Member States at 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005, 1 January 2006 and 1 July 2006.

**Table 2 DSL retail lines in the EU by country**

	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	627 970	765 183	889 294	996 118	1 113 641	1 247 471	1 356 007
CZ		21 000	36 000	106 000	181 000	309 000	399 478
DK	390 692	473 359	562 009	638 961	714 529	830 697	947 577
DE	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941	10 207 500	12 128 500
EE	37 558	37 558	50 906	64 628	75 133	83 880	109 157
EL	359	8 588	22 937	46 547	91 869	157 993	294 026
ES	1 297 563	1 676 466	2 086 172	2 604 067	3 268 602	3 915 435	4 561 707
FR	2 099 933	3 262 800	4 490 487	6 293 249	7 802 442	9 390 561	10 697 543
IE	7 040	25 160	55 554	115 583	143 370	202 290	275 172
IT	1 387 658	2 158 458	3 223 188	4 402 585	5 175 270	6 556 648	7 363 356
CY		10 033	14 490	17 994	17 994	44 322	49 873
LV			26 815	39 281	49 465	69 464	83 807
LT	15 444	26 438	34 074	50 688	69 804	104 798	133 880
LU	8 960	13 860	22 128	32 607	47 048	63 132	71 870
HU		117 369	165 980	239 810	297 237	412 886	485 881
MT			11 426	22 145	23 799	30 139	30 523
NL	679 508	978 044	1 374 129	1 884 561	2 204 067	2 551 052	2 848 829
AT	224 650	279 600	355 725	442 075	525 230	683 083	781 408
PL		80 239	108 901	410 186	532 284	730 358	1 098 859
PT	107 537	184 860	293 435	424 169	576 258	707 916	835 998
SI		38 330	53 840	74 922	95 932	129 281	155 288
SK		4 210	9 900	38 334	64 539	104 487	140 503
FI	271 000	328 704	400 000	585 650	763 283	929 268	1 068 082
SE	495 300	595 200	686 200	883 200	1 038 747	1 250 441	1 392 000
UK	1 099 518	1 804 609	2 753 061	4 203 651	5 784 002	7 265 521	8 712 129
<b>EU15</b>	<b>12 580 037</b>	<b>17 052 217</b>	<b>22 502 351</b>	<b>30 262 706</b>	<b>37 388 305</b>	<b>45 959 008</b>	<b>53 334 204</b>
<b>EU10</b>	<b>53 002</b>	<b>335 177</b>	<b>512 332</b>	<b>1 063 988</b>	<b>1 407 187</b>	<b>2 018 615</b>	<b>2 687 249</b>
<b>EU25</b>	<b>12 633 039</b>	<b>17 387 394</b>	<b>23 014 683</b>	<b>31 326 694</b>	<b>38 795 492</b>	<b>47 977 623</b>	<b>56 021 453</b>

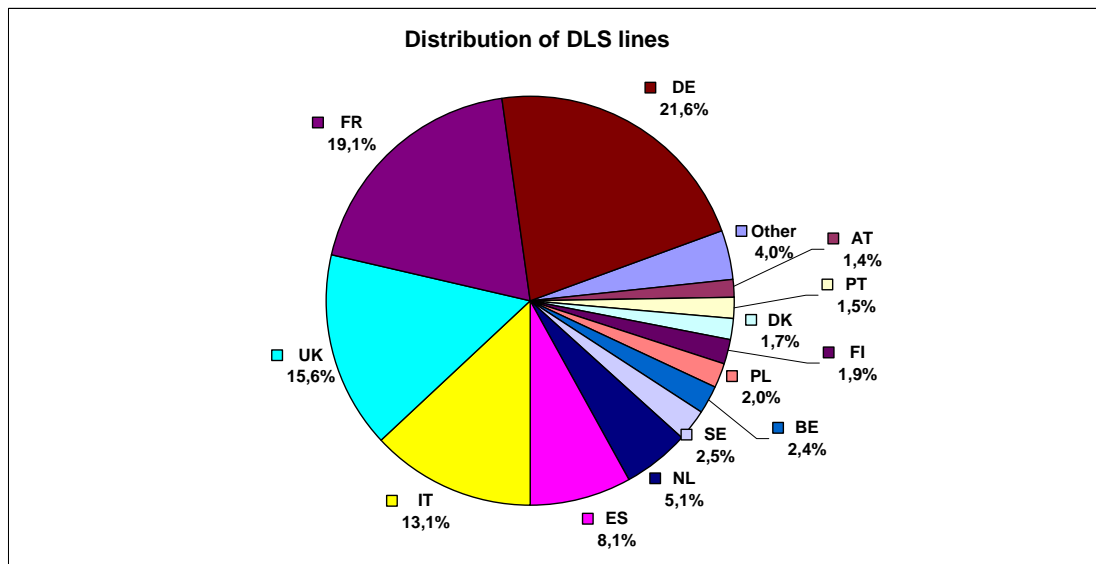
Figure 11 displays the distribution of DSL lines by country, Figure 12 presents this distribution in percentage terms at 1 July 2006 and Figure 13 shows the growth rate since January 2003 (EU15 for January 2003).

**Figure 11 EU countries by number of DSL lines**

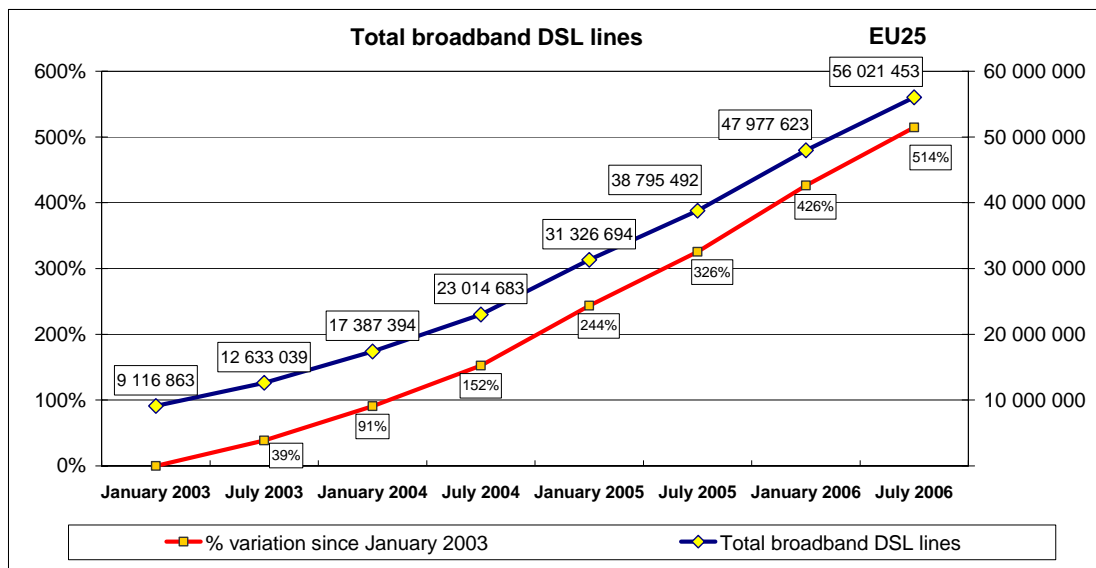


Germany accounts for 21.6% of all DSL lines, followed by France with more than 19% and the UK with 15.6%. These three countries provide more than 56% of all DSL lines, as shown in Figure 12. The new Member States contribute 2.69 million DSL lines, which represent 4.8% of the total DSL lines, up by 1.17 percentage points since July 2005.

**Figure 12 EU distribution of DSL lines by country (% of DSL lines)**



**Figure 13 Growth trend since January 2003**



The number of DSL lines added each day in the period between July 2005 and July 2006 was 47 194, which means that 9.2% more lines per day were added than in the period between July 2004 and July 2005, when 43 235 new DSL connections per day were recorded.

Germany added almost 4 million new lines over the period, followed by the UK, France and Italy. Amongst the new Member States Poland was the main contributor to the growth of the EU25 DSL lines in the period of one year.

**Figure 14 DSL lines added, by country**

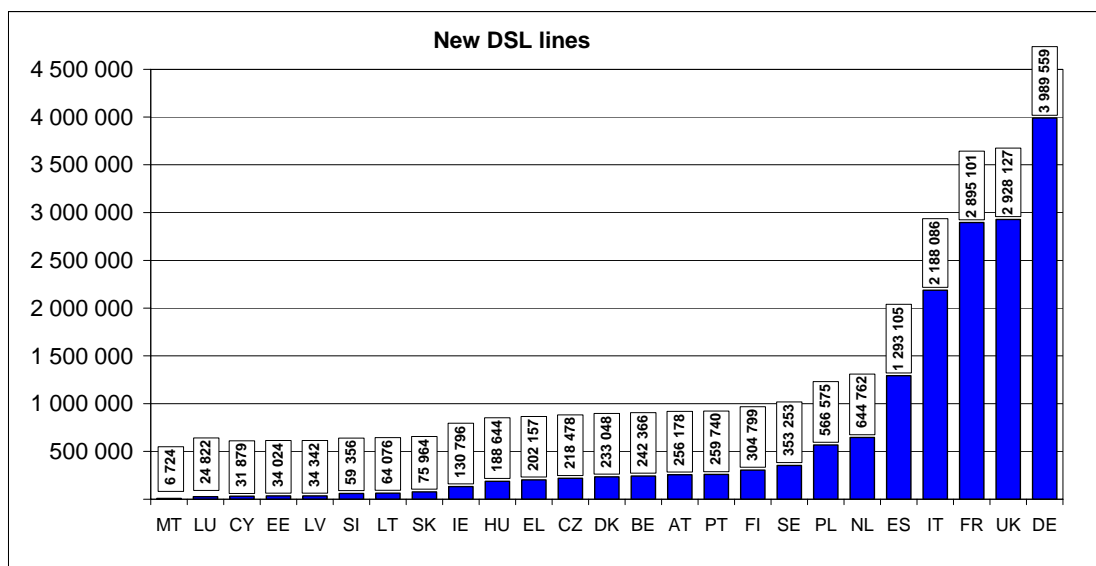
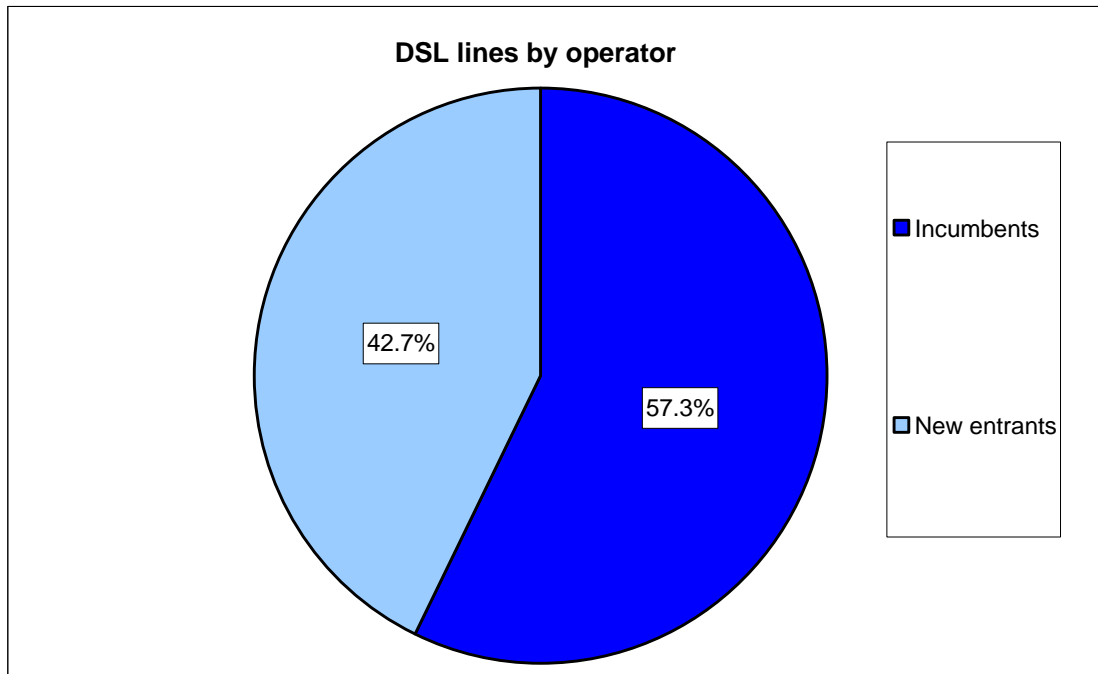


Figure 15 shows the percentage of DSL lines provided by the incumbent fixed operators and the new entrants. Figure 16 displays the trend in the percentage of DSL lines provided by incumbent fixed operators.

**Figure 15 DSL lines market share by operator**



**Figure 16 Trend in the % of DSL lines provided by incumbent fixed operators**

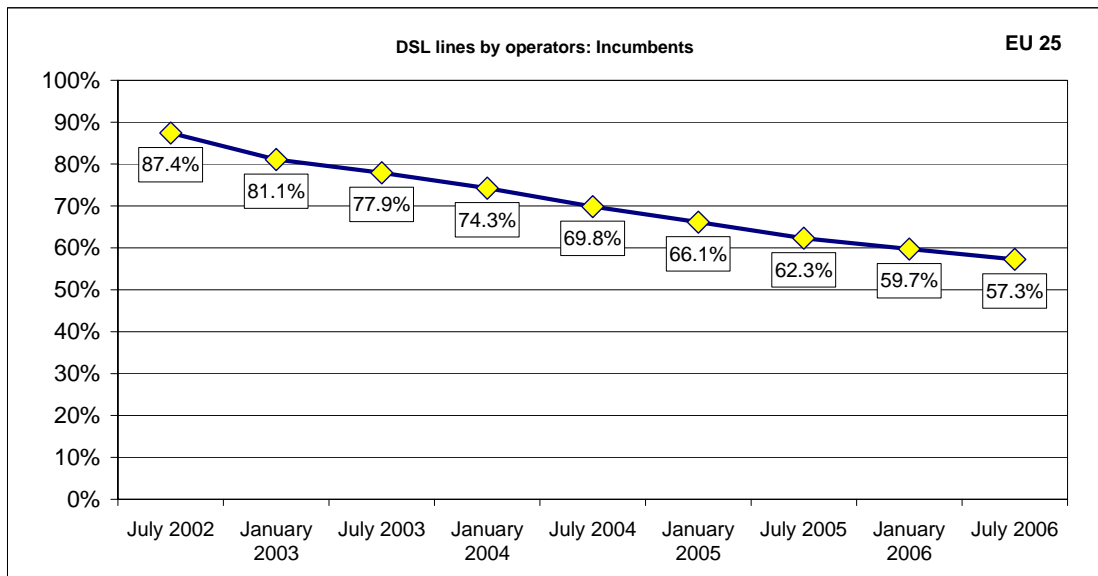
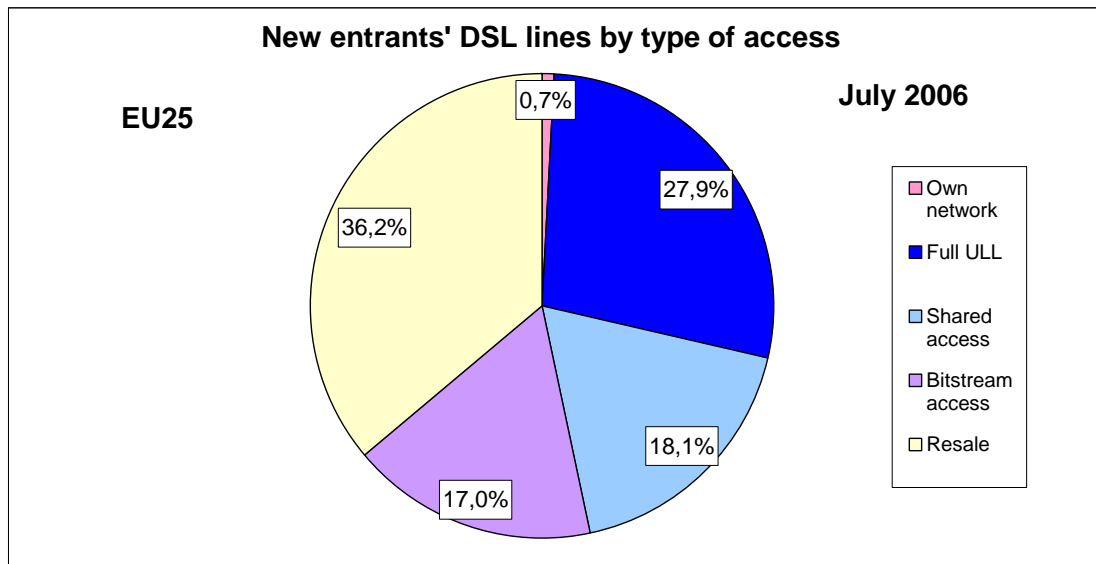
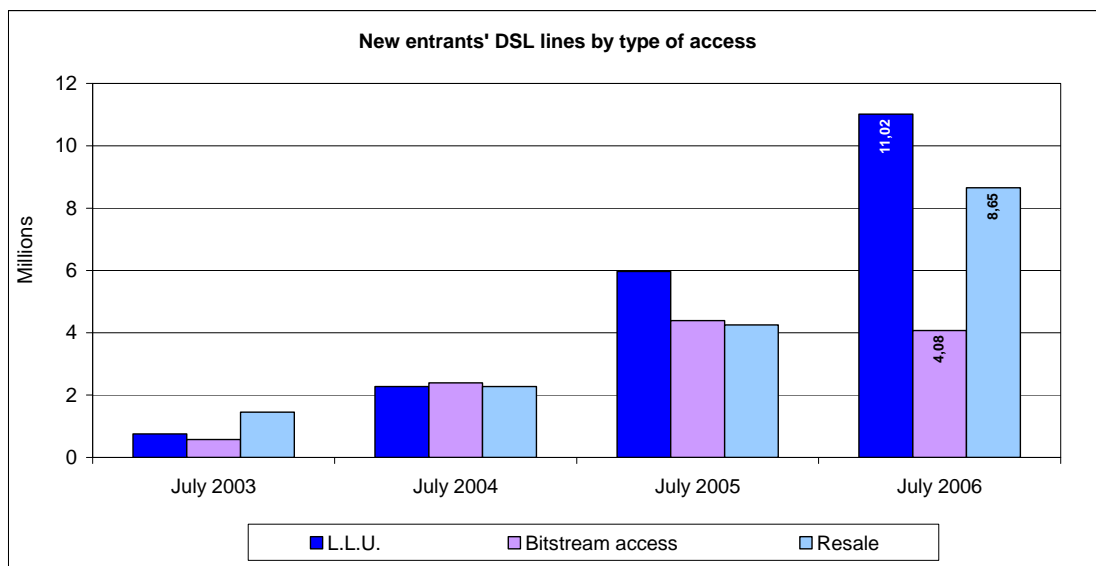


Figure 17 displays the type of access used by new entrants' to provide DSL lines to their customers. Local Loop Unbundling (fully unbundled lines and shared access) is now the main wholesale access for new entrants with 46.0% of DSL lines, up from 40.8% in July 2005. New entrants are gradually shifting from bitstream access (down by 13.1 percentage points since July 2005) towards local loop unbundling in the provision of broadband services, as can be seen in Figure 18. Share of resale, which represents a type of access for low-investment intensive new entrants has grown considerably in the last year (7.1 percentage points) and has been driven mainly by the UK and Germany.

**Figure 17 New entrants' DSL lines by type of access**



**Figure 18 New entrants' DSL lines by type of access**



## Fixed broadband lines using technologies other than dsl

There were 12 637 328 broadband lines using technologies other than DSL in the EU as of 1 July 2006. 3 082 808 lines were added, which represents a 32.27% increase since 1 July 2005. Net additions in the period between July 2005 and July 2006 were higher than between July 2004 and July 2005, when 2 697 632 new lines were sold.

Alternative operators provided 92.6% of these lines, a marginal 0.4 percentage points higher than the percentage of July 2005.

Table 3 shows how the non-DSL broadband lines in the EU were distributed between the EU Member States at 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005, 1 January 2006 and 1 July 2006.

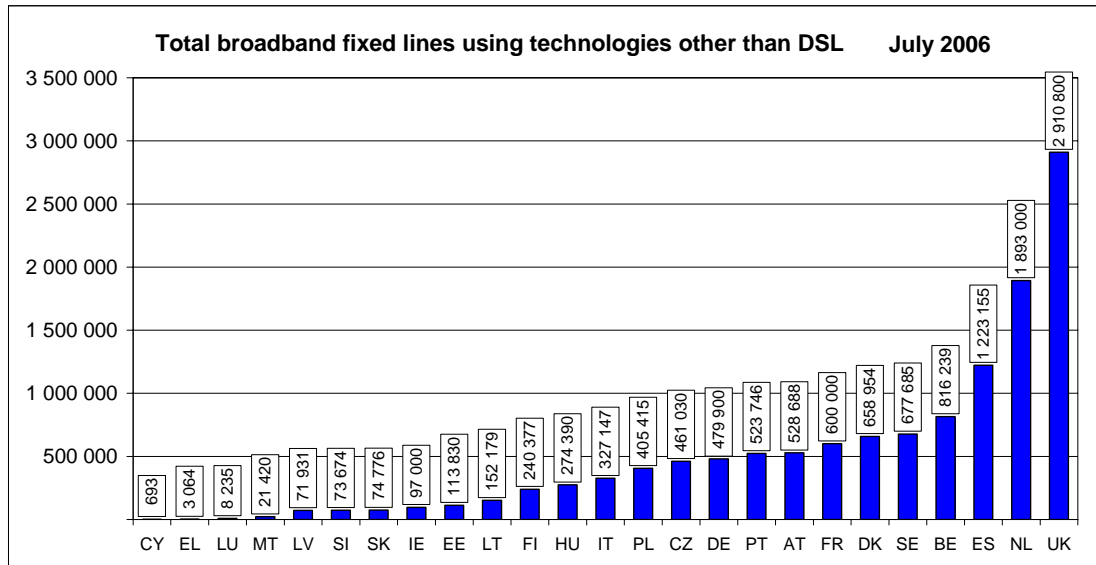
**Table 3 Non-DSL broadband lines in the EU by Country**

	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	417 897	479 553	555 379	623 638	690 492	763 113	816 239
CZ		80 000	85 000	122 200	255 000	341 000	461 030
DK	215 765	254 547	359 468	400 417	473 902	506 890	658 954
DE	87 262	169 371	129 106	195 476	296 428	350 600	479 900
EE	20 957	20 957	51 865	73 989	75 113	95 224	113 830
EL	1 796	1 895	2 449	4 908	1 714	2 120	3 064
ES	478 855	551 703	681 455	848 639	971 737	1 111 498	1 223 155
FR	313 707	393 854	425 000	500 000	520 000	560 000	600 000
IE	4 100	9 650	10 085	22 533	32 745	74 570	97 000
IT	198 536	243 481	280 309	298 647	346 104	340 048	327 147
CY		30	30	973	973	2 768 <sup>1</sup>	693
LV			7 089	17 167	35 916	61 865	71 931
LT	27 074	38 544	54 205	78 365	100 815	129 248	152 179
LU	1 322	2 082	3 206	4 412	6 001	7 304	8 235
HU		69 859	91 036	125 931	160 320	206 826	274 390
MT			2 312	15 909	17 752	21 150	21 420
NL	900 000	930 000	998 400	1 200 000	1 438 248	1 562 521	1 893 000
AT	302 400	333 000	352 000	385 600	412 600	493 100	528 688
PL		93 000	111 000	126 551	178 442	285 483	405 415
PT	262 339	315 577	370 610	429 961	478 295	514 385	523 746
SI		22 068	22 499	43 109	60 737	67 405	73 674
SK		4 065	4 585	13 535	15 846	33 440	74 776
FI	63 950	118 740	172 100	194 279	211 331	242 095	240 377
SE	351 800	415 200	445 200	501 900	494 900	615 235	677 685
UK	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109	2 623 105	2 910 800
<b>EU15</b>	<b>4 705 714</b>	<b>5 586 153</b>	<b>6 427 267</b>	<b>7 543 910</b>	<b>8 653 606</b>	<b>9 766 584</b>	<b>10 987 990</b>
<b>EU10</b>	<b>48 031</b>	<b>328 523</b>	<b>429 621</b>	<b>617 729</b>	<b>900 914</b>	<b>1 244 409</b>	<b>1 649 338</b>
<b>EU25</b>	<b>4 753 745</b>	<b>5 914 676</b>	<b>6 856 888</b>	<b>8 161 639</b>	<b>9 554 520</b>	<b>11 010 993</b>	<b>12 637 328</b>

<sup>1</sup> This figure refers to all capacities of leased lines without distinguishing between retail lines, lines provided to other operators or to its own network.

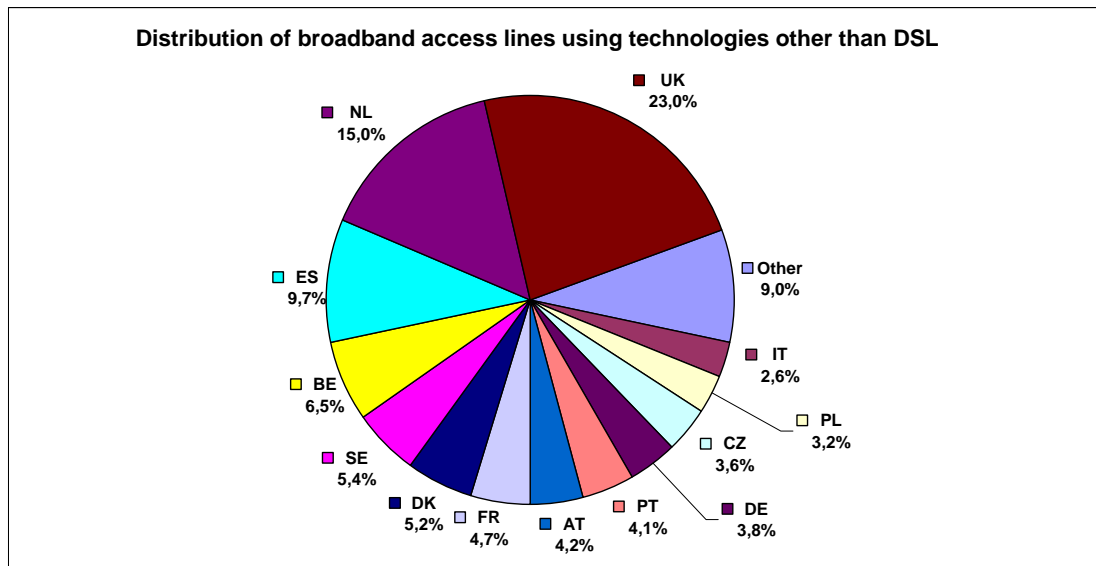
Figure 19 displays the distribution by country, Figure 20 presents this distribution in percentage terms at 1 July 2006 and Figure 21 shows the growth rate since January 2003.

**Figure 19 EU countries by number of broadband lines using other technologies**

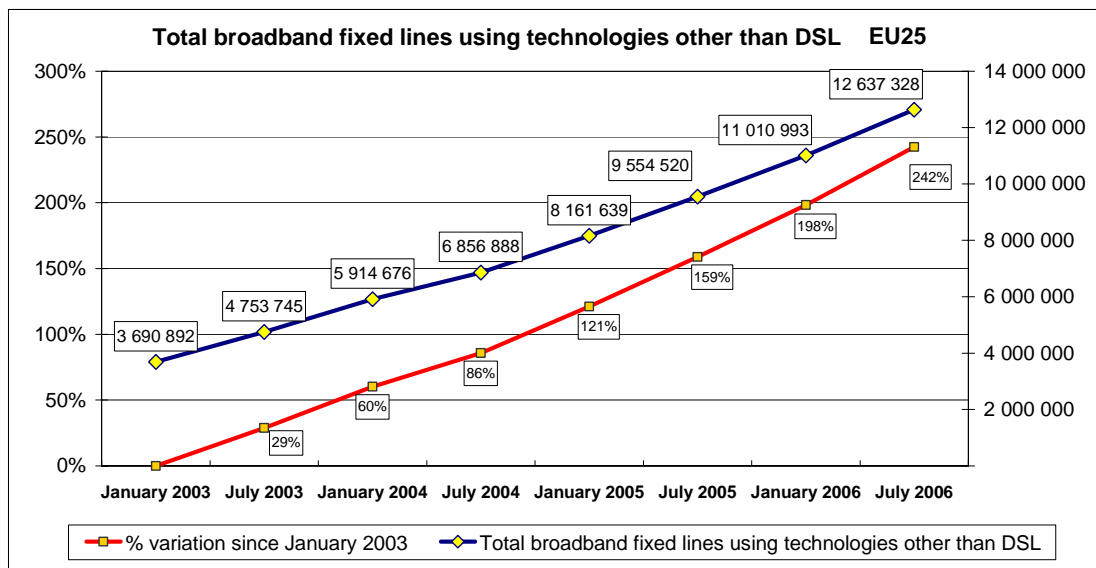


The UK accounts for 23.0% of all broadband lines using other technologies, as shown in Figure 20. The Netherlands has the second largest individual share, with 15.0%, followed by Spain and Belgium with 9.7% and 6.5% respectively. These four countries account for more than 54% of this category of broadband line in the EU.

**Figure 20 EU distribution of broadband lines using other technologies by country (% of lines)**



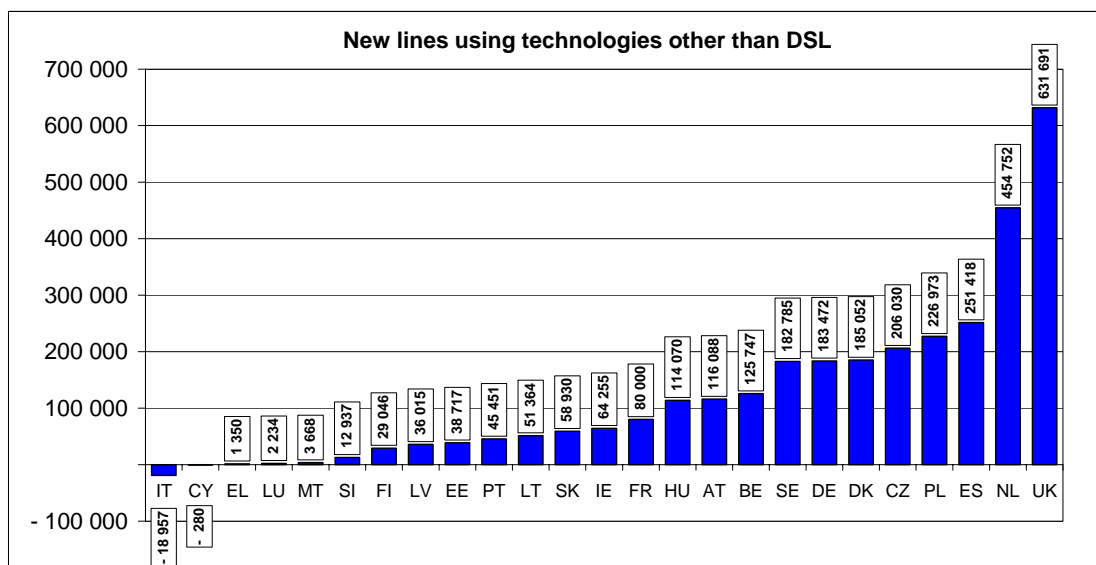
**Figure 21 Growth trend since January 2003**



8 446 broadband lines using other technologies were added each day in the period between July 2005 and July 2006. This compares to the 7 391 new lines per day between July 2004 and July 2005 and represents a 14.3% increase.

The UK added 631 691 lines using technologies other than DSL. The Netherlands added almost 455 000 lines, while Spain, Poland and Czech Republic added more than 200 000 lines each. In all the other countries combined the total number of new lines was 1.31 million, which represents 42.6% of all new lines using technologies other than DSL. In Italy and Cyprus the growth was negative due to the reduction in the number of satellite and/or leased lines reported.

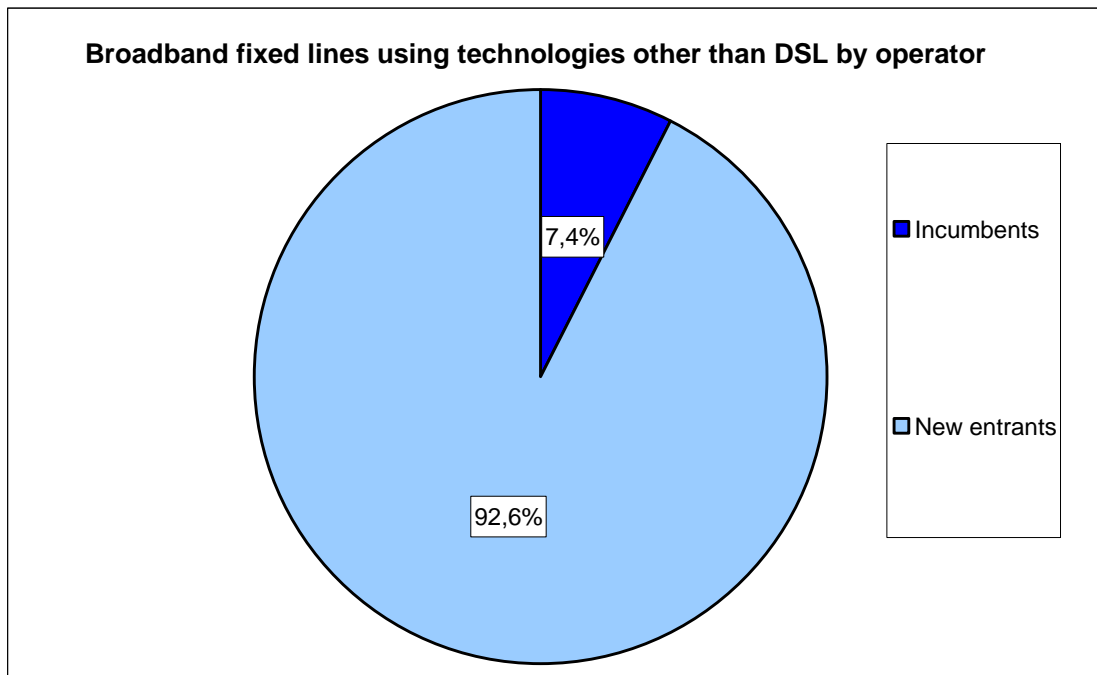
**Figure 22 Broadband lines using other technologies added by country**



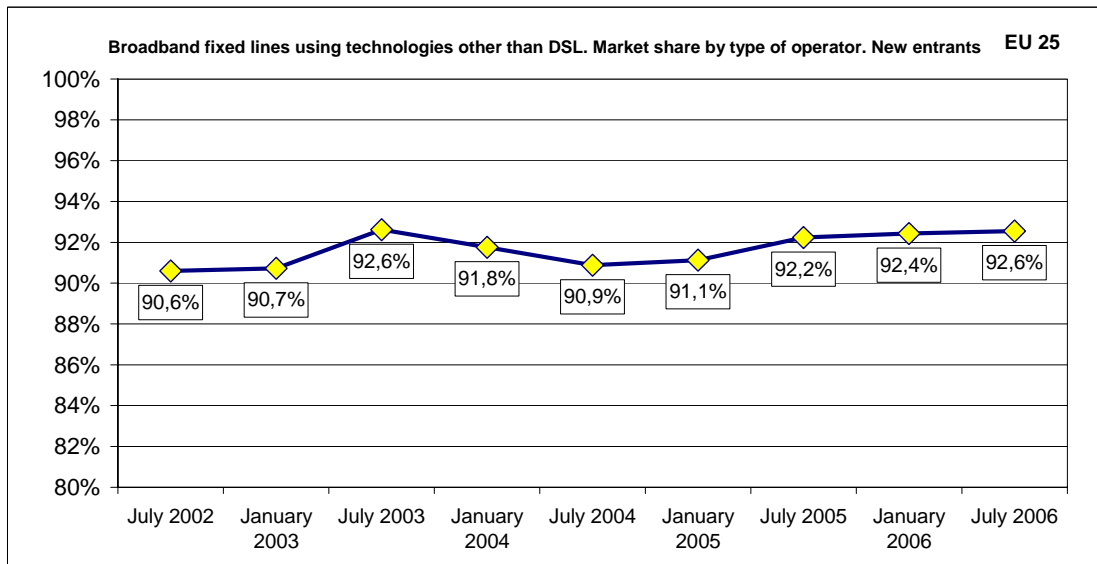
CY- Decrease due to the reduction in number of leased lines compared to previous periods, where, contrary to 2006, data included all capacities of leased lines without distinguishing between retail lines, lines provided to other operators or to its own network.

Figure 23 and 24 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 23 Broadband lines using other technologies: market share**



**Figure 24 Trend in the % of lines using technologies other than DSL provided by new entrants**



**ANNEX 1: 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 2006**

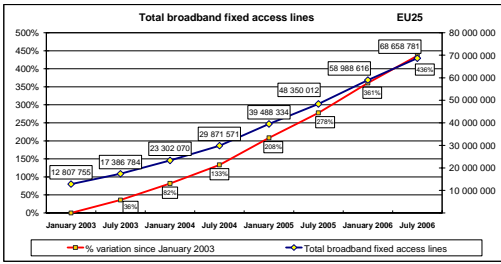
Country	Incumbent's PSTN activated main lines	Fully unbundled lines supplied by the incumbent to new entrants			Shared access lines supplied by the incumbent to new entrants			Wholesale DSL lines supplied			
		Unbundled lines	Requested lines	N. of agreements	Shared lines	Requested lines	N. of agreements	Bitstream access		Simple resale	
								No. of lines	No. of agreements	No. of lines	No. of agreements
<b>Belgium</b>	4,179,827	12,393	553	8	5,374	21	8	248,920	11	55,841	18
<b>Czech Republic</b>	2,991,950	4,446		6	8,596		6	60025	23		
<b>Denmark</b>	3.173.963	81.973		21	80.962		8	84.002	11	18.408	10
<b>Germany</b>	38,600,000	4,000,000		112	27,000		17	1500	5	2,500,000	22
<b>Estonia</b>	412,000	3,630	40	7							
<b>Greece</b>	5,440,808	6,836	303	13	4,144	224	5	103,217	13		
<b>Spain</b>	15.434.815	292.262	19.645	20	386.034	15.020	15	436.584	30	247.848	2
<b>France</b>	32,000,000	1,242,964			2,108,135			1,672,096	5	425,712	
<b>Ireland</b>	1.600.000	13.749	2.351	4	1.211	20	4	65.324	9		
<b>Italy</b>	21,536,000	1,697,000	20,260	25	292,056	7,374	9	1,071,000	239		
<b>Cyprus</b>	388,970	335	506	2							
<b>Latvia</b>	600,000	106		2	10		2	949	11	259	
<b>Lithuania</b>	753,563							2,472	12		
<b>Luxembourg</b>	239,000	4,956	121	4	114	1	4			9,080	6
<b>Hungary</b>	3,267,000	61	44	6	1506	245	5	134,249	20		
<b>Malta</b>	203,910									12,187	15
<b>Netherlands</b>	6,929,000	214,328		10	562,501		10	Confidential	5		
<b>Austria</b>	2.842.730	162.368			107			117.965			
<b>Poland</b>	8,536,746										
<b>Portugal</b>	3,573,004	145,608	3,361	4	6		2	57,767	8		
<b>Slovenia</b>	894,234	7945	1920	3	3839	696	3	20,278	13		
<b>Slovakia</b>	1,297,771									2364	12
<b>Finland</b>	2,088,640	283,357			80,448			87,409			
<b>Sweden</b>	5,395,000	100,000	n.a.	131	368,000	n.a.	1312	3,200	26	130,000	n.a.
<b>United Kingdom</b>	25,177,181	163,086		55	417,079		31	1,010,691	28	7,053,083	605
<b>EU15</b>	168.209.968	8 420 880	46594	407	4 333 171	22660	1425	4 959 675	390	10439972	663
<b>EU10</b>	19.346.144	16.523	2.510	26	13.951	941	16	217.973	79	14.810	27
<b>EU25</b>	187.556.112	8.437.403	49.104	433	4.347.122	23.601	1.441	5.177.648	469	10.454.782	690

**BROADBAND RETAIL LINES, 1 July 2006**

July 06		New entrants' DSL lines on PSTN July 2006						Incumbents' access lines by other means										New entrants' access lines by other means										
	Incumbent's DSL lines	Own network	Full ULL	Shared access	Bitstream access	Resale	Total	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Public access WIFI Hotspots	Total (exc. WIFI)	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Public access WIFI Hotspots	Total (exc. WIFI)	
BE	1 051 090		6 451	4 264	238 361	55 841	304 917			117						712	117	3 597	812 525								1 228	816 122
CZ	326 411		4 446	8 596	60 025		73 067									59		242 000	200 000			15 000	4 000	30			2 175	461 030
DK	677 154		80 529	87 540	83 368	18 986	270 423	6 129	268 459	2 867					4 737	706	282 192	17 879	222 510	4 526		19 574	146	95	112 032	231	376 762	
DE	6 400 000		3 200 000	27 000	1 500	2 500 000	5 728 500			53 000			3 300			5 300	56 300		360 000				54 000	9 600		3 700	423 600	
EE	103 649	3 358	2 100			50	5508	1 256				13 680			1 256	107	16 192	6 268	53 088			22 035			16 247	735	97 638	
EL	179 829		6 836	4 144	103 217		114 197			871			300				1 171	451		1 021		421					1 893	
ES	3 198 979		292 262	386 034	436 584	247 848	1362 728						3 683			2 002	3683	31 468	1 163 058	12 515		4 536	1 168	4 118	2 609	45	1219 472	
FR	5 248 636		1 242 964	2 108 135	1 672 096	425 712	5 448 907											600 000									600 000	
IE	194 888		13 749	1 211	65 324		80 284										0	52 500	39 900			4 600					97 000	
IT	5 195 000	301	886 682	276 230	1 004 571	572	2 168 356			437		194	28 211		190	780	29 032	1 104				209 735	83 000		4 276	143	298 115	
CY	49 538		335				335			272					16	8	288		323	60			20		2	5	405	
LV	83 307		106	10	125	259	500	299								299	5 530	21 003	4 979			2 604	225	1 208	36 083		71 632	
LT	131 408				2 472		2 472			117		50			1 394	477	1 561	21 736	58 119	1 273		15 323			54 167	33	150 618	
LU	57 875		4 801	114		9 080	13 995	31	737	176		175				1 119	77	6 955	10			53			21		7 116	
HU	350 065		61	1 506	134 249		135 816	1 550	31 663	1 500		n.a.	n.a.		n.a.		34 713	9 700	225 477	3 500		1 000	n.a.	n.a.			239 677	
MT	18 336					12 187	12 187												21 420								21 420	
NL	2 072 000		214 328	562 501	Confident.		776 829												1 810 000				83 000				1 893 000	
AT	520 041		143 301	101	117 965		261 367										0	17 742	502 546	1 200		1 000	1 000	5 200			528 688	
PL	989 190	109 669					109 669			92							6 173	10 401	334 400	46 467		1 125	97		6 752	563	399 242	
PT	636 125		139 883	6	59 984		199 873		342 945	1 263						947	344 208	1 801	174 181	2 056				1 500			179 538	
SI	128 355		7 945	3 839	8 678	6 471	26 933		229			305				255	534	251	71 890			867			132	18	73 140	
SK	138 139					2 364	2 364			211							211	2 500	26 552	22 500		980			22 033	500	74 565	
FI	731 412		168 813	80 448	87 409		336 670	1 271	86 195						50 835		138 301	2 712	75 311					830	23 223		102 076	
SE	794 000		100 000	368 000		130 000	598 000	n.a.	n.a.	4 000		21 000	n.a.	n.a.	n.a.		25 000	8 600	355 000	6 000		282 000	1 000	85	n.a.		652 685	
UK	2 826 000	60 964	163 086	417 079		5 245 000	5 886 129											2 500	2 902 300				6 000				2 910 800	
EU15	29 783 029	61 265	666 3685	432 2807	3870 379	8633039	23 551 175	7 431	698 336	62 731	0	21 369	35 494	0	55 762	10 447	881 123	140 431	902 4286	27 328	0	60 4919	146 314	21 428	142 161	53 47	10 106 867	
EU10	2 318 398	113 027	14 993	13 951	205 549	21 331	368 851	3 105	31 984	2 100		14 035			8 747	906	59 971	298 386	1 012 272	78 779		58 934	4 342	1 238	135 416	4 029	1 589 367	
EU25	32 101 427	174 292	6 678 678	4 336 758	4 075 928	8 654 370	23 920 026	10 536	730 320	64 831		35 404	35 494		64 509	11 353	941 094	438 817	10 036 558	106 107		663 853	150 656	22 666	277 577	9 376	11 696 234	

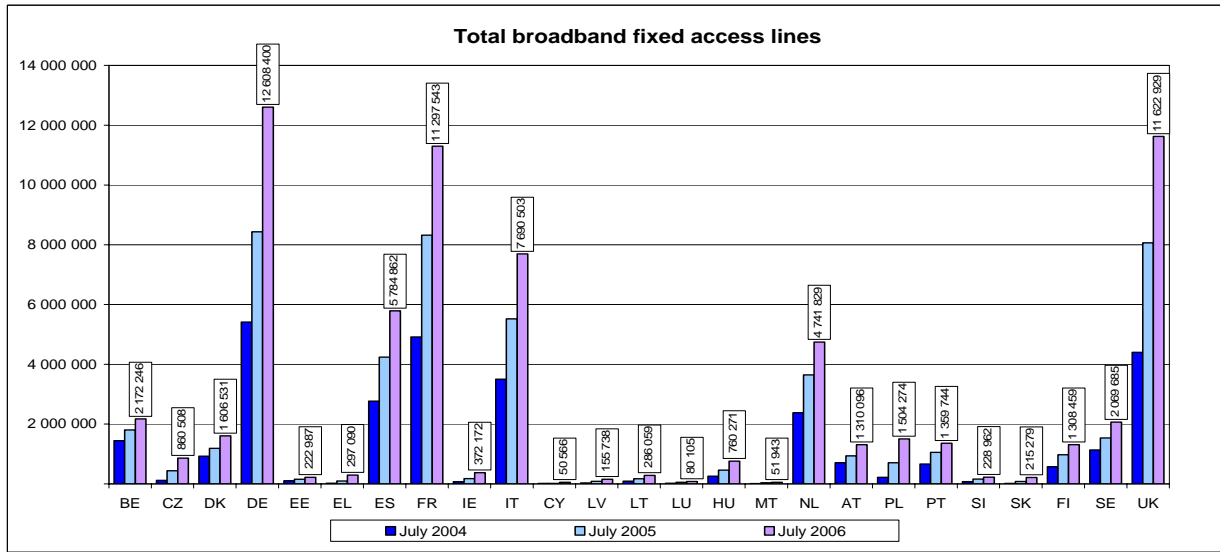
**Broadband access in the EU as at 1 July 2006**

**Total broadband access retail fixed lines in EU25**



Total broadband lines		% variation since January 2003	Variation July 05- July 06	
			%	Lines/day
July 2003	17 386 784	36%	42.00%	
October 2003	19 394 275	51%		New lines 20 308 769
January 2004	23 302 070	82%		Lines/day 55 640
July 2004	29 871 571	133%		Variation July 04- July 05
October 2004	33 438 076	161%		% 61.86%
January 2005	39 488 334	208%		New lines 18 478 441
July 2005	48 350 012	278%		Lines/day 50 626
October 2005	52 594 188	311%		Variation July 03- July 04
January 2006	58 988 616	361%		% 71.81%
July 2006	68 658 781	436%		New lines 12 484 787
				Lines/day 34 205

Variation lines/day: 9.9%

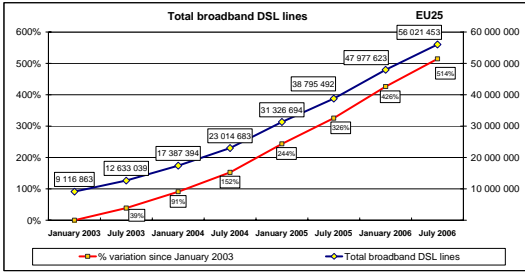


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133	2 010 584	2 172 246
CZ		101 000	121 000	228 200	436 000	650 000	860 508
DK	606 457	727 906	921 477	1 039 378	1 188 431	1 337 587	1 606 531
DE	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369	10 558 100	12 608 400
EE	58 515	58 515	102 771	138 617	150 246	179 104	222 987
EL	2 155	10 483	25 386	51 455	93 583	160 113	297 090
ES	1 776 418	2 228 169	2 767 627	3 452 706	4 240 339	5 026 933	5 784 862
FR	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442	9 950 561	11 297 543
IE	9 469	34 050	67 530	138 116	177 121	276 860	372 172
IT	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374	6 896 696	7 690 503
CY		10 063	14 520	18 967	18 967	47 090	50 566
LV			33 904	56 448	85 381	131 329	155 739
LT	42 518	64 982	88 279	129 053	170 619	234 046	286 059
LU	10 282	15 942	25 334	37 019	53 049	70 436	80 105
HU		187 228	257 016	365 741	457 557	619 712	760 271
MT			13 738	38 054	41 551	51 289	51 943
NL	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315	4 113 573	4 741 829
AT	527 050	612 600	707 725	827 675	937 830	1 176 183	1 310 096
PL		173 239	219 901	536 738	710 726	1 015 841	1 504 274
PT	369 876	500 437	664 045	854 130	1 054 553	1 222 301	1 359 744
SI		60 398	76 339	118 031	156 669	196 686	228 962
SK		8 275	14 485	51 869	80 385	137 927	215 279
FI	334 950	447 444	572 100	779 929	974 614	1 171 363	1 308 459
SE	847 100	1 010 400	1 131 400	1 385 100	1 533 647	1 865 676	2 069 886
UK	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111	9 888 626	11 622 929
EU 15	17 285 751	22 638 370	28 929 618	37 806 616	46 041 911	55 725 592	64 322 194
EU10	101 033	663 700	941 953	1 681 718	2 308 101	3 263 024	4 336 587
EU25	17 386 784	23 302 070	29 871 571	39 488 334	48 350 012	58 988 616	68 658 781

	Difference			Difference		
	July 2004 - July 2005	Variation	Lines/Day	July 2005 - July 2006	Variation	Lines/Day
BE	359 460	25%	985	368 113	20%	1 009
CZ	315 000	260%	863	424 508	97%	1 163
DK	266 954	29%	731	418 100	35%	1145
DE	3 020 122	56%	8 274	4 173 031	49%	11 433
EE	47 475	46%	130	72 741	48%	199
EL	68 197	269%	187	203 507	217%	558
ES	1 472 712	53%	4 035	1 544 523	36%	4 232
FR	3 406 955	69%	9 334	2 975 101	36%	8 151
IE	109 591	162%	300	195 051	110%	534
IT	2 017 877	58%	5 528	2 169 129	39%	5 943
CY	4 447	31%	12	31 599	167%	87
LV	51 477	152%	141	70 357	82%	193
LT	82 340	93%	226	115 440	68%	316
LU	27 715	109%	76	27 056	51%	74
HU	200 541	78%	549	302 714	66%	829
MT	27 813	202%	76	10 392	25%	28
NL	1 269 786	54%	3 479	1 099 514	30%	3 012
AT	230 105	33%	630	372 266	40%	1020
PL	490 825	223%	1 345	793 548	112%	2 174
PT	390 508	59%	1 070	305 191	29%	836
SI	80 330	105%	220	72 293	46%	198
SK	65 900	455%	181	134 894	168%	370
FI	402 514	70%	1 103	333 845	34%	915
SE	402 247	36%	1 102	536 038	35%	1 469
UK	3 667 550	83%	10 048	3 559 818	44%	9 753
EU 15	17 112 293	59%	46 883	18 280 283	40%	50 083
EU10	1 366 148	145%	3 743	2 028 486	88%	5 557
EU25	18 478 441	62%	50 626	20 308 769	42%	55 640

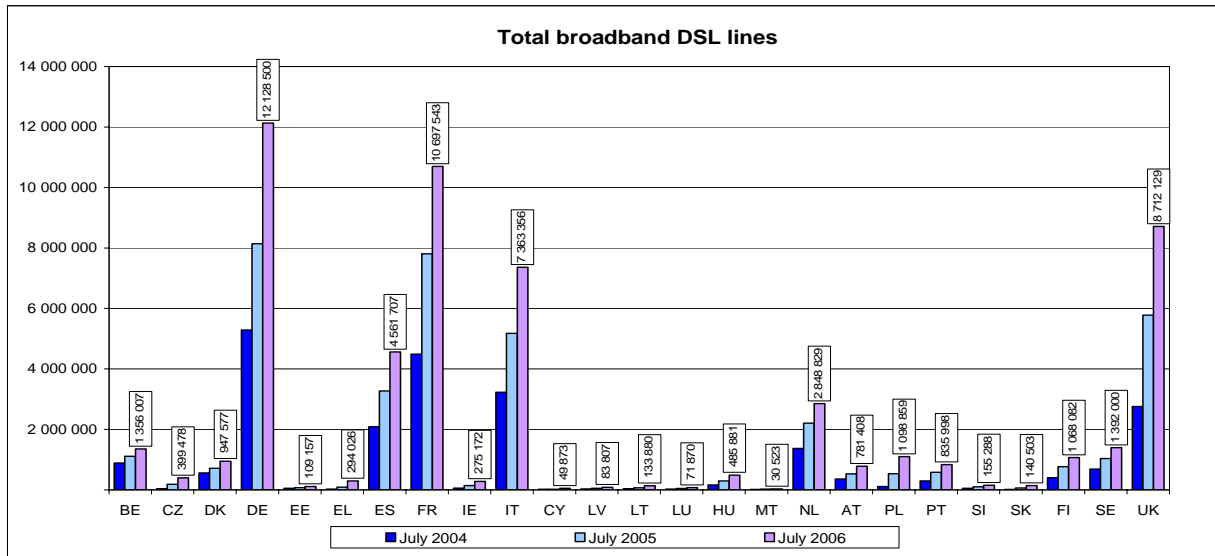
**Broadband access in the EU as at 1 July 2006**

**Total DSL retail lines in EU25**



Total broadband DSL lines		% variation since January 2003	Variation July 05- July 06	
			%	Lines/day
July 2003	12 633 039	39%		44.40%
October 2003	14 385 871	58%	New lines	17 225 961
January 2004	17 387 394	91%	Lines/day	47 194
July 2004	23 014 683	152%	Variation July 04- July 05	
October 2004	26 194 876	187%	%	68.57%
January 2005	31 326 694	244%	New lines	15 780 809
July 2005	38 795 492	326%	Lines/day	43 235
October 2005	42 284 347	364%	Variation July 03- July 04	
January 2006	47 977 623	426%	%	82.18%
July 2006	56 021 453	514%	New lines	10 381 644
			Lines/day	28 443

Variation lines/day: 9.2%

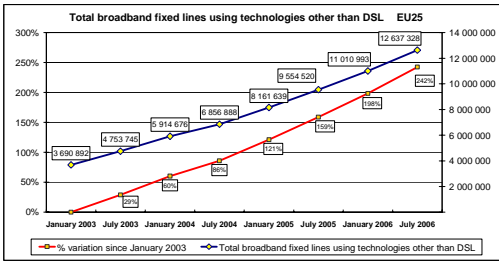


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	627 970	765 183	889 294	996 118	1 113 641	1 247 471	1 356 007
CZ	21 000	36 000	106 000	181 000	309 000	399 478	599
DK	390 692	473 359	562 009	638 961	714 529	830 697	947 577
DE	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941	10 207 500	12 128 500
EE	37 558	37 558	50 906	64 628	75 133	83 880	109 157
EL	359	8 588	22 937	46 547	91 869	157 993	294 026
ES	1 297 563	1 676 466	2 086 172	2 604 067	3 268 602	3 915 435	4 561 707
FR	2 099 933	3 262 800	4 490 487	6 293 249	7 802 442	9 390 561	10 687 543
IE	5 369	24 400	57 445	115 583	144 376	202 290	275 172
IT	1 387 658	2 158 458	3 223 188	4 402 585	5 175 270	6 556 648	7 363 356
CY		10 033	14 490	17 994	17 994	44 322	49 873
LV			26 815	39 281	49 465	69 464	83 807
LT	15 444	26 438	34 074	50 688	69 804	104 798	133 880
LU	8 960	13 860	22 128	32 607	47 048	63 132	71 870
HU		117 369	165 980	239 810	297 237	412 886	485 881
MT			11 426	22 145	23 799	30 139	30 523
NL	679 508	978 044	1 374 129	1 884 561	2 204 067	2 551 052	2 848 829
AT	224 650	279 600	355 725	442 075	525 230	683 083	781 408
PL		80 239	108 901	410 186	532 284	730 358	1 098 859
PT	107 537	184 860	293 435	424 169	576 258	707 916	835 998
SI		38 330	53 840	74 922	95 932	129 281	155 288
SK		4 210	9 900	38 334	64 539	104 487	140 503
FI	271 000	328 704	400 000	585 650	763 283	929 268	1 068 082
SE	495 300	595 200	686 200	883 200	1 038 747	1 250 441	1 392 000
UK	1 099 518	1 804 609	2 753 061	4 203 651	5 784 002	7 265 521	8 712 129
EU 15	12 580 037	17 052 217	22 502 351	30 262 706	37 388 305	45 959 008	53 334 204
EU10	53 002	335 177	512 332	1 063 988	1 407 187	2 018 615	2 687 249
EU25	12 633 039	17 387 394	23 014 683	31 326 694	38 795 492	47 977 623	56 021 453

	July 2004 - July 2005			July 2005 - July 2006		
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
BE	224 347	25%	615	242 366	22%	664
CZ	145 000	403%	397	218 478	121%	599
DK	152 520	27%	418	233 048	33%	638
DE	2 852 800	54%	7 816	3 989 559	49%	10 930
EE	24 227	48%	66	34 024	45%	93
EL	68 932	301%	189	202 157	220%	554
ES	1 182 430	57%	3 240	1 293 105	40%	3543
FR	3 311 955	74%	9 074	2 895 101	37%	7 932
IE	86 931	151%	238	130 796	91%	358
IT	1 952 082	61%	5 348	2 188 086	42%	5 995
CY	3 504	24%	10	31 879	177%	87
LV	22 650	84%	62	34 342	69%	94
LT	35 730	105%	98	64 076	92%	176
LU	24 920	113%	68	24 822	53%	68
HU	131 257	79%	360	188 644	63%	517
MT	12 373	108%	34	6 724	28%	18
NL	829 938	60%	2 274	644 762	29%	1 766
AT	169 505	48%	464	256 178	49%	702
PL	423 383	389%	1 160	566 575	106%	1 552
PT	282 823	96%	775	259 740	45%	712
SI	42 092	78%	115	59 356	62%	163
SK	54 639	552%	150	75 964	118%	208
FI	363 283	91%	995	304 799	40%	835
SE	352 547	51%	966	353 253	34%	968
UK	3 030 941	110%	8 304	2 928 127	51%	8 022
EU 15	14 885 954	66%	40 783	15 945 899	43%	43 687
EU10	894 855	175%	2 452	1 280 062	91%	3 507
EU25	15 780 809	69%	43 235	17 225 961	44%	47 194

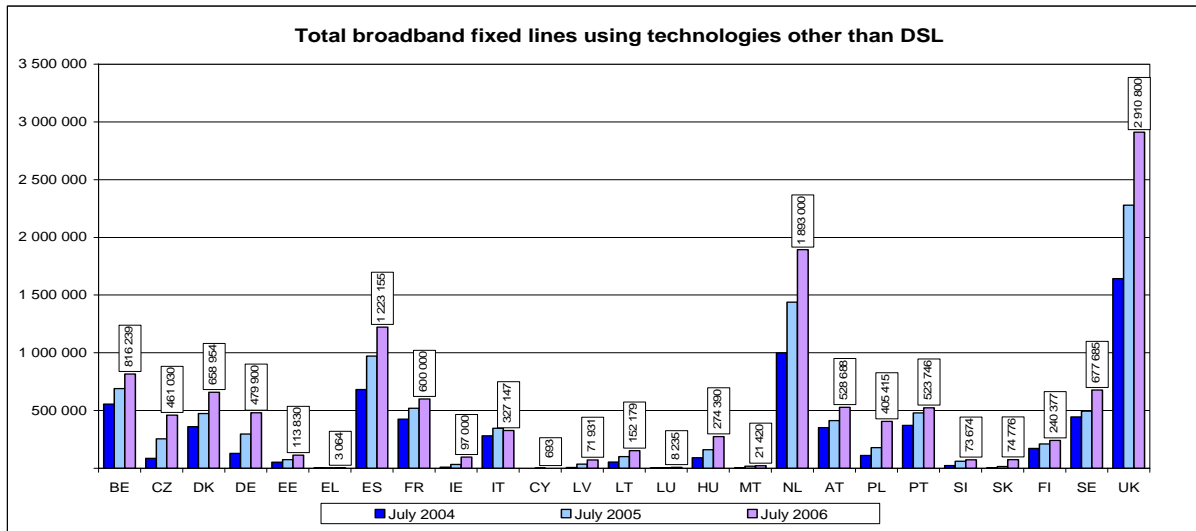
**Broadband access in the EU as at 1 July 2006**

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



Total broadband lines using technologies other than DSL	%	% variation since January 2003	Variation July 05- July 06	
			%	Lines/day
July 2003	4 753 745	29%	New lines	3 082 808
October 2003	5 008 404	36%	Lines/day	8 446
January 2004	5 914 676	60%	Variation July 04- July 05	
July 2004	6 856 888	86%	%	39.34%
October 2004	7 243 200	96%	New lines	2 697 632
January 2005	8 161 639	121%	Lines/day	7 391
July 2005	9 554 520	159%	Variation July 03- July 04	
October 2005	10 309 841	179%	%	44.24%
January 2006	11 010 993	198%	New lines	2 103 143
July 2006	12 637 328	242%	Lines/day	5 762

Variation lines/day: 14.3%

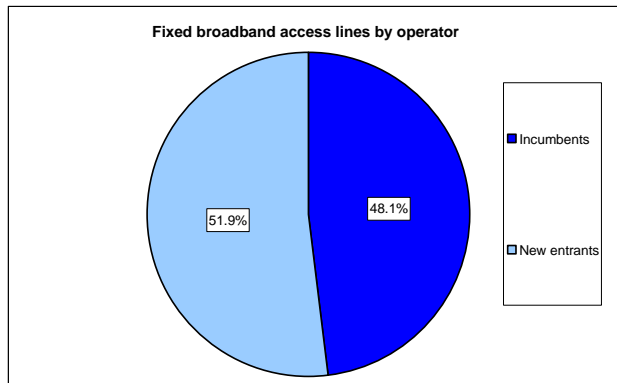


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	417 897	479 553	555 379	623 638	690 492	763 113	816 239
CZ	80 000	85 000	122 200	255 000	341 000	461 030	461 030
DK	215 765	254 547	359 468	400 417	473 902	506 890	658 954
DE	87 262	169 371	129 106	195 476	296 428	350 600	479 900
EE	20 957	20 957	51 865	73 989	75 113	95 224	113 830
EL	1 796	1 895	2 449	4 908	1 714	2 120	3 064
ES	478 855	551 703	681 455	848 639	971 737	1 111 498	1 223 155
FR	313 707	393 854	425 000	500 000	520 000	560 000	600 000
IE	4 100	9 650	10 085	22 533	32 745	74 570	97 000
IT	198 536	243 481	280 309	298 647	346 104	340 048	327 147
CY		30	30	973	973	2 768	693
LV		7 089	7 089	17 167	35 916	61 865	71 931
LT	27 074	38 544	54 205	78 365	100 815	129 248	152 179
LU	1 322	2 082	3 206	4 412	6 001	7 304	8 235
HU		69 859	91 036	125 931	160 320	206 826	274 300
MT			2 312	15 909	17 752	21 150	21 420
NL	900 000	930 000	998 400	1 200 000	1 438 248	1 562 521	1 893 000
AT	302 400	333 000	352 000	385 600	412 600	493 100	528 688
PL		93 000	111 000	126 551	178 442	285 483	405 415
PT	262 339	315 577	370 610	429 961	478 295	514 385	523 746
SI		22 068	22 499	43 109	60 737	67 405	73 674
SK		4 065	4 585	13 535	15 846	33 440	74 776
FI	63 950	118 740	172 100	194 279	211 331	242 095	240 377
SE	351 800	415 200	445 200	501 900	494 900	615 235	677 685
UK	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109	2 623 105	2 910 800
<b>EU 15</b>	<b>4 705 714</b>	<b>5 586 153</b>	<b>6 427 267</b>	<b>7 543 910</b>	<b>8 653 606</b>	<b>9 766 584</b>	<b>10 987 990</b>
<b>EU10</b>	<b>48 031</b>	<b>328 523</b>	<b>429 621</b>	<b>617 729</b>	<b>900 914</b>	<b>1 244 409</b>	<b>1 649 338</b>
<b>EU25</b>	<b>4 753 745</b>	<b>6 272 076</b>	<b>7 850 061</b>	<b>8 161 639</b>	<b>9 554 520</b>	<b>11 010 993</b>	<b>12 637 328</b>

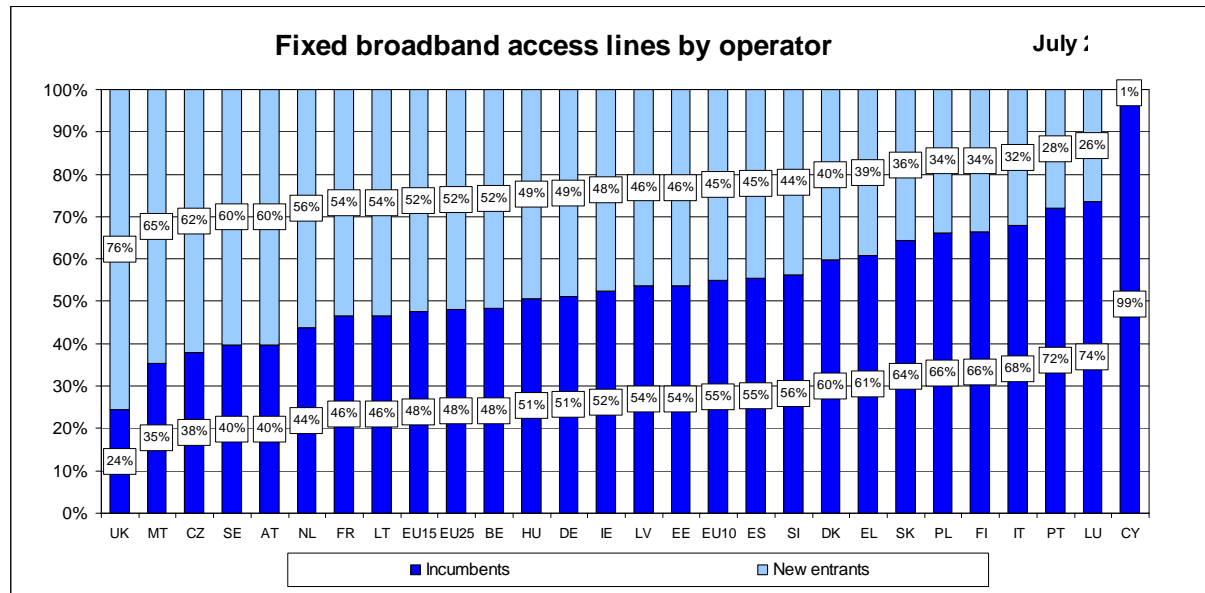
	Difference July 2004 - July 2005			Difference July 2005 - July 2006		
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
BE	135 113	24%	370	125 747	18%	345
CZ	170 000	200%	466	206 030	81%	564
DK	114 434	32%	314	185 052	39%	507
DE	167 322	130%	458	183 472	62%	503
EE	23 248	45%	64	38 717	52%	106
EL	- 735	-30%	- 2	1 350	79%	4
ES	290 282	43%	795	251 418	26%	689
FR	95 000	22%	260	80 000	15%	219
IE	22 660	225%	62	64 255	196%	176
IT	65 795	23%	180	- 18 957	-5%	- 52
CY	943	3143%	3	- 280	-29%	- 1
LV	28 827	407%	79	36 015	100%	99
LT	46 610	86%	128	51 364	51%	141
LU	2 795	87%	8	2 234	37%	6
HU	69 284	76%	190	114 070	71%	313
MT	15 440	668%	42	3 668	21%	10
NL	439 848	44%	1 205	454 752	32%	1 246
AT	60 600	17%	166	116 088	28%	318
PL	67 442	61%	185	226 973	127%	622
PT	107 685	29%	295	45 451	10%	125
SI	38 238	170%	105	12 937	21%	35
SK	11 261	246%	31	58 930	372%	161
FI	39 231	23%	107	29 046	14%	80
SE	49 700	11%	136	182 785	37%	501
UK	636 609	39%	1 744	631 691	28%	1 731
<b>EU 15</b>	<b>2 226 339</b>	<b>35%</b>	<b>6 100</b>	<b>2 334 384</b>	<b>27%</b>	<b>6 396</b>
<b>EU10</b>	<b>471 293</b>	<b>110%</b>	<b>1 291</b>	<b>748 424</b>	<b>83%</b>	<b>2 050</b>
<b>EU25</b>	<b>2 697 632</b>	<b>39%</b>	<b>7 391</b>	<b>3 082 808</b>	<b>32%</b>	<b>8 446</b>

**Broadband access in the EU as at 1 July 2006**

**Fixed broadband access lines by operator in EU25**



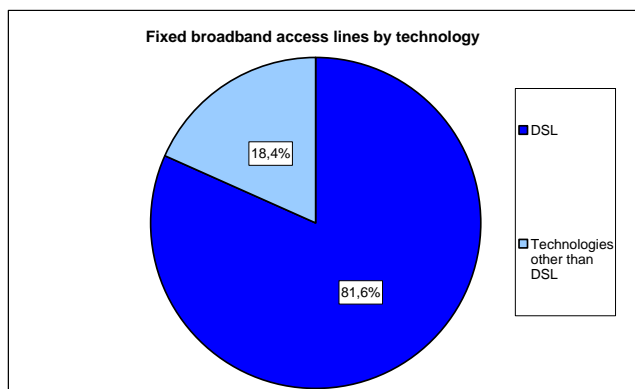
Fixed broadband access lines by operator		
	Incumbents	New entrants
July 2006	48.1%	51.9%



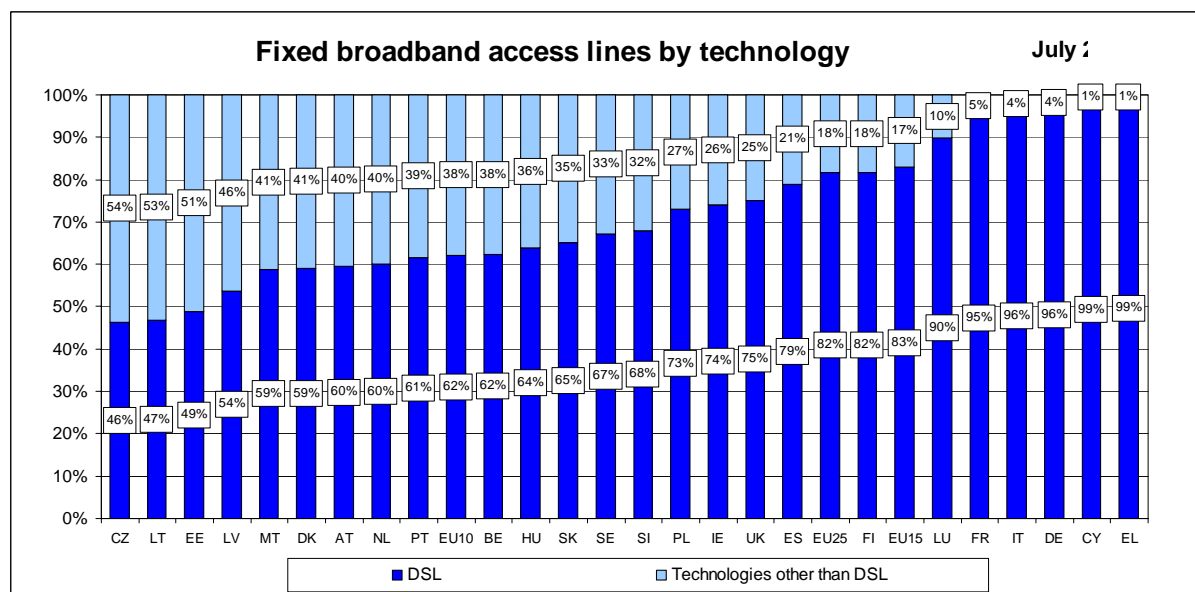
	Incumbents	New entrants
BE	48.4%	51.6%
CZ	37.9%	62.1%
DK	59.7%	40.3%
DE	51.2%	48.8%
EE	53.7%	46.3%
EL	60.9%	39.1%
ES	55.4%	44.6%
FR	46.5%	53.5%
IE	52.4%	47.6%
IT	67.9%	32.1%
CY	98.5%	1.5%
LV	53.7%	46.3%
LT	46.5%	53.5%
LU	73.6%	26.4%
HU	50.6%	49.4%
MT	35.3%	64.7%
NL	43.7%	56.3%
AT	39.7%	60.3%
PL	66.2%	33.8%
PT	72.1%	27.9%
SI	56.3%	43.7%
SK	64.3%	35.7%
FI	66.5%	33.5%
SE	39.6%	60.4%
UK	24.3%	75.7%
EU15	47.7%	52.3%
EU10	54.8%	45.2%
EU25	48.1%	51.9%

Broadband access in the EU as at 1 July 2006

Fixed broadband access lines by technology in EU25



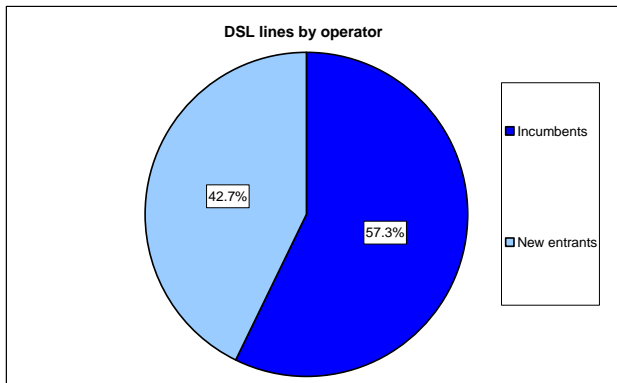
Fixed broadband access lines by technology		
	DSL	Technologies other than DSL
July 2006	81.6%	18.4%



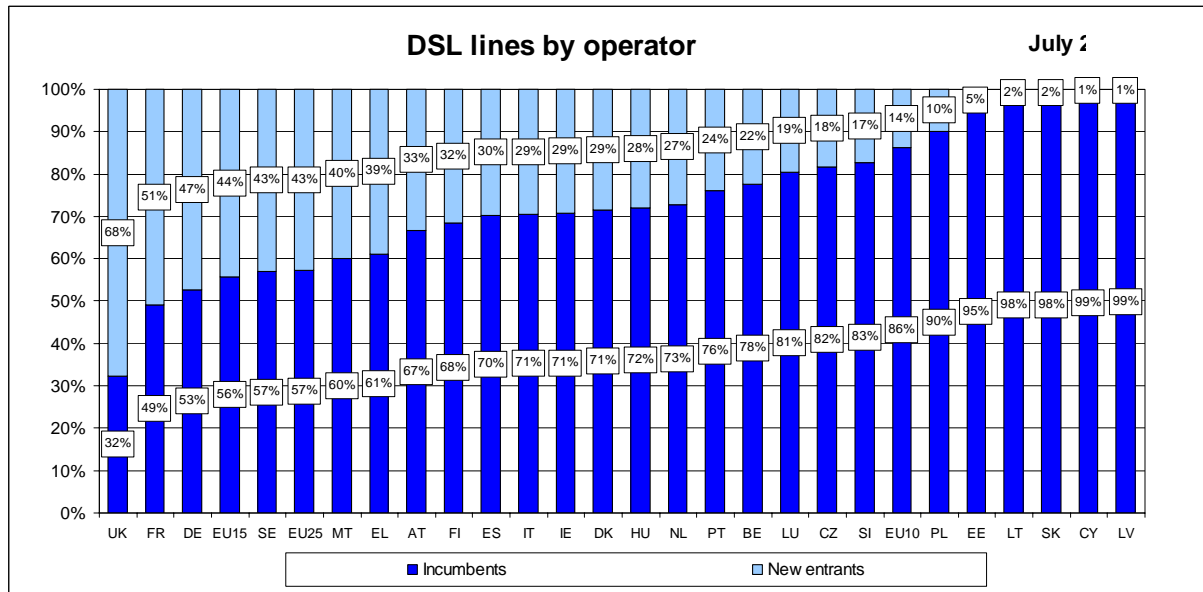
	DSL	Technologies other than DSL
BE	62.4%	37.6%
CZ	46.4%	53.6%
DK	59.0%	41.0%
DE	96.2%	3.8%
EE	49.0%	51.0%
EL	99.0%	1.0%
ES	78.9%	21.1%
FR	94.7%	5.3%
IE	73.9%	26.1%
IT	95.7%	4.3%
CY	98.6%	1.4%
LV	53.8%	46.2%
LT	46.8%	53.2%
LU	89.7%	10.3%
HU	63.9%	36.1%
MT	58.8%	41.2%
NL	60.1%	39.9%
AT	59.6%	40.4%
PL	73.0%	27.0%
PT	61.5%	38.5%
SI	67.8%	32.2%
SK	65.3%	34.7%
FI	81.6%	18.4%
SE	67.3%	32.7%
UK	75.0%	25.0%
EU15	82.9%	17.1%
EU10	62.0%	38.0%
EU25	81.6%	18.4%

Broadband access in the EU as at 1 July 2006

DSL access lines by operator in EU25



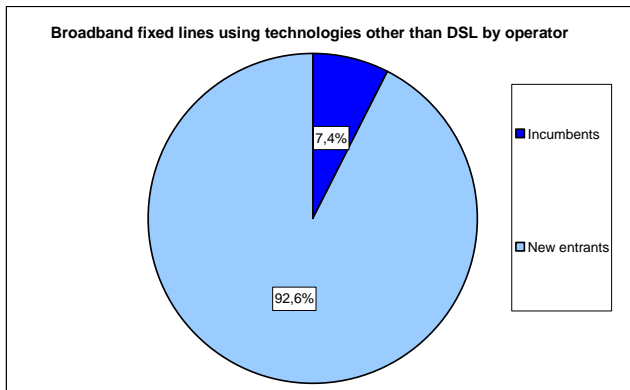
	DSL lines by operator	
	Incumbents	New entrants
July 2006	57.3%	42.7%



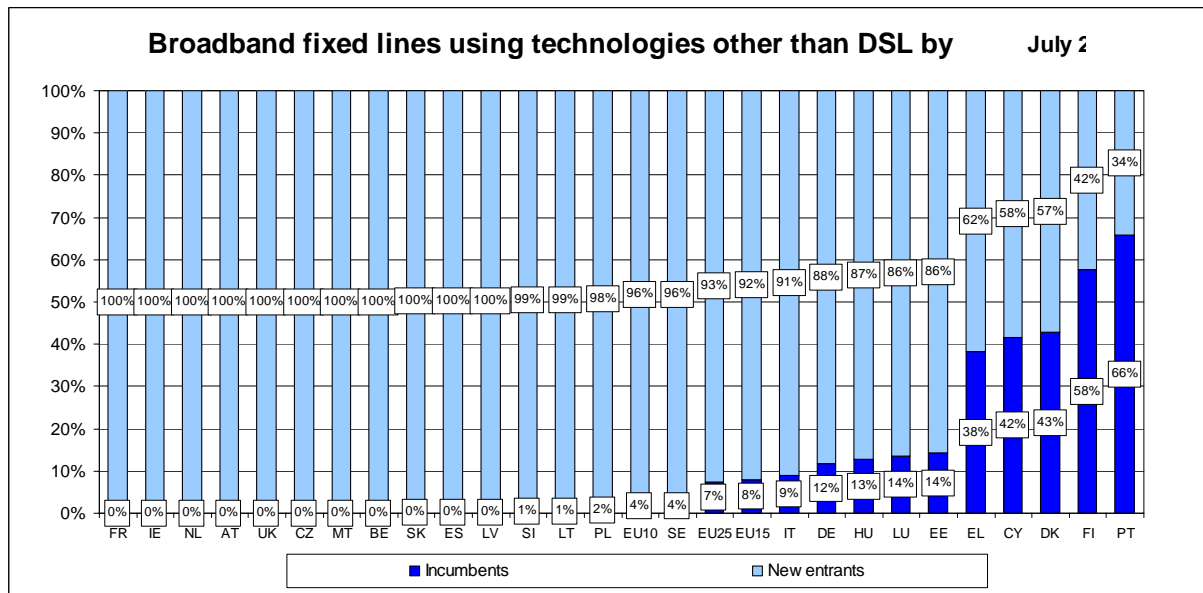
	Incumbents	New entrants
BE	77.5%	22.5%
CZ	81.7%	18.3%
DK	71.5%	28.5%
DE	52.8%	47.2%
EE	95.0%	5.0%
EL	61.2%	38.8%
ES	70.1%	29.9%
FR	49.1%	50.9%
IE	70.8%	29.2%
IT	70.6%	29.4%
CY	99.3%	0.7%
LV	99.4%	0.6%
LT	98.2%	1.8%
LU	80.5%	19.5%
HU	72.0%	28.0%
MT	60.1%	39.9%
NL	72.7%	27.3%
AT	66.6%	33.4%
PL	90.0%	10.0%
PT	76.1%	23.9%
SI	82.7%	17.3%
SK	98.3%	1.7%
FI	68.5%	31.5%
SE	57.0%	43.0%
UK	32.4%	67.6%
EU15	55.8%	44.2%
EU10	86.3%	13.7%
EU25	57.3%	42.7%

**Broadband access in the EU as at 1 July 2006**

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



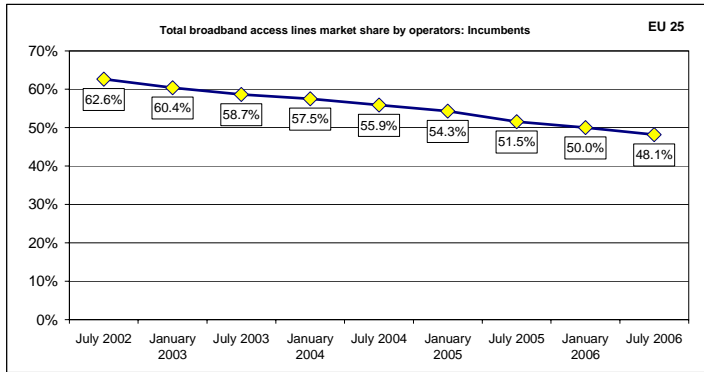
	Broadband fixed lines using technologies other than DSL by operator	
	Incumbents	New entrants
July 2006	7.4%	92.6%



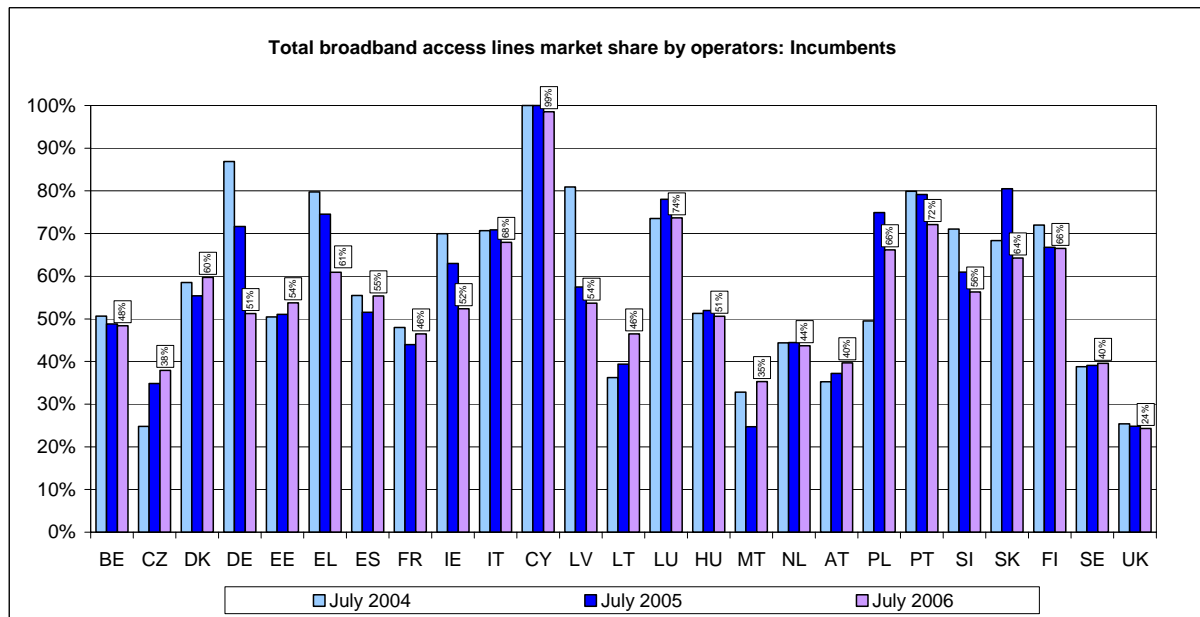
	Incumbents	New entrants
BE	0.0%	100.0%
CZ	0.0%	100.0%
DK	42.8%	57.2%
DE	11.7%	88.3%
EE	14.2%	85.8%
EL	38.2%	61.8%
ES	0.3%	99.7%
FR	0.0%	100.0%
IE	0.0%	100.0%
IT	8.9%	91.1%
CY	41.6%	58.4%
LV	0.4%	99.6%
LT	1.0%	99.0%
LU	13.6%	86.4%
HU	12.7%	87.3%
MT	0.0%	100.0%
NL	0.0%	100.0%
AT	0.0%	100.0%
PL	1.5%	98.5%
PT	65.7%	34.3%
SI	0.7%	99.3%
SK	0.3%	99.7%
FI	57.5%	42.5%
SE	3.7%	96.3%
UK	0.0%	100.0%
EU15	8.0%	92.0%
EU10	3.6%	96.4%
EU25	7.4%	92.6%

**Broadband access in the EU as at 1 July 2006**

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



Total broadband access lines market share by operators: Incumbents	Variation	
	since January 2003 (% points)	in each period (in % points)
January 2003	60.4%	
July 2003	58.7%	-1.7%
January 2004	57.5%	-2.9%
July 2004	55.9%	-4.5%
January 2005	54.3%	-6.1%
July 2005	51.5%	-8.9%
January 2006	50.0%	-10.4%
July 2006	48.1%	-12.2%

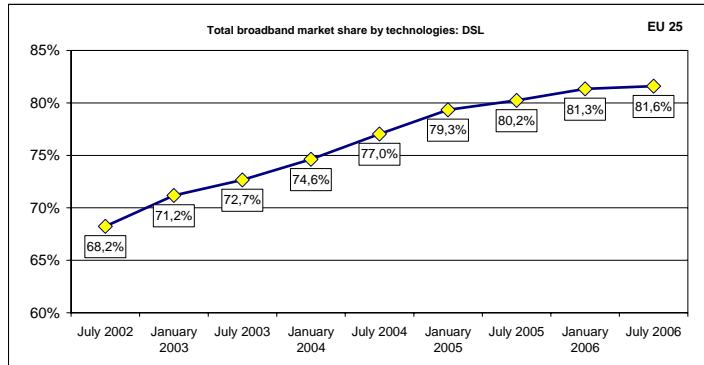


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	48.7%	50.5%	51.1%	53.2%	50.7%	49.6%	48.8%	48.3%	48.4%
CZ				14.9%	24.8%	44.3%	34.9%	42.3%	37.9%
DK	61.6%	63.7%	62.0%	61.1%	58.5%	58.2%	55.4%	58.7%	59.7%
DE	93.9%	92.6%	90.8%	88.0%	86.9%	80.4%	71.6%	60.1%	51.2%
EE				65.0%	50.5%	48.4%	51.1%	51.9%	53.7%
EL		17.8%	17.9%	72.3%	79.7%	74.8%	74.5%	69.6%	60.9%
ES	61.4%	56.3%	55.5%	55.8%	55.5%	52.3%	51.5%	53.3%	55.4%
FR	72.0%	62.7%	57.5%	54.8%	48.0%	44.7%	44.0%	44.8%	46.5%
IE	72.8%	35.8%	44.9%	61.7%	70.0%	65.9%	63.0%	55.6%	52.4%
IT	76.5%	64.5%	66.7%	66.9%	70.7%	73.1%	70.8%	71.7%	67.9%
CY				100.0%	100.0%	100.0%	100.0%	100.0%	98.5%
LV				80.9%	69.6%	57.5%	52.6%	53.7%	
LT				38.8%	36.2%	36.9%	39.4%	43.7%	46.5%
LU	#DIV/0!	90.5%	83.7%	79.3%	73.5%	77.7%	78.0%	75.8%	73.6%
HU				50.2%	51.3%	52.1%	51.9%	53.8%	50.6%
MT				32.8%	25.6%	24.7%	30.6%	35.3%	
NL	19.3%	29.9%	36.1%	40.7%	44.4%	46.1%	44.5%	44.6%	43.7%
AT	30.4%	31.7%	33.1%	33.9%	35.2%	36.1%	37.2%	39.7%	39.7%
PL				46.3%	49.5%	76.4%	74.9%	64.3%	66.2%
PT	66.5%	70.7%	75.2%	78.5%	79.9%	80.7%	79.1%	76.3%	72.1%
SI				65.2%	71.0%	63.3%	61.0%	60.5%	56.3%
SK				50.9%	68.3%	73.9%	80.5%	75.9%	64.3%
FI	72.9%	74.0%	69.9%	73.5%	72.0%	72.3%	66.8%	66.4%	66.5%
SE	54.7%	52.7%	43.1%	39.5%	38.8%	38.5%	39.1%	38.4%	39.6%
UK	25.5%	22.6%	25.6%	26.4%	25.4%	25.1%	24.8%	24.8%	24.3%
EU15	62.6%	60.4%	58.7%	57.8%	56.1%	54.1%	51.3%	49.7%	47.7%
EU10				46.1%	49.4%	59.3%	56.5%	55.6%	54.8%
EU25				57.5%	55.9%	54.3%	51.5%	50.0%	48.1%

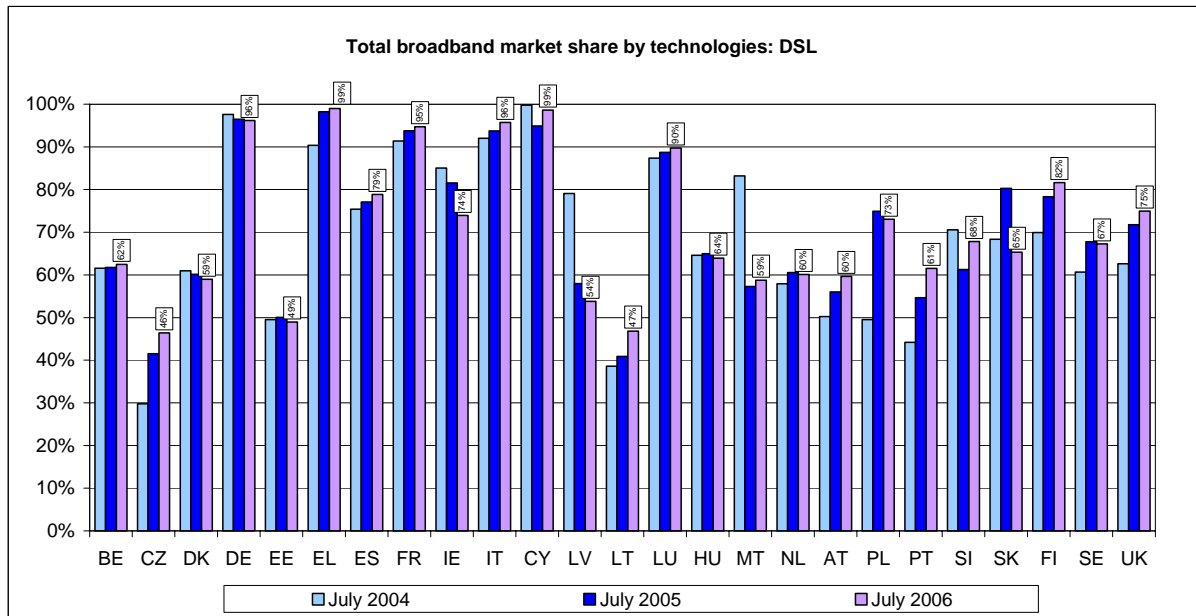
	Variation	
	July 06-05	July 05-04
BE	-0.4%	-1.9%
CZ	3.1%	10.1%
DK	4.3%	-3.1%
DE	-20.4%	-15.2%
EE	2.7%	0.6%
EL	-13.6%	-5.2%
ES	3.8%	-4.0%
FR	2.5%	-4.0%
IE	-10.6%	-7.0%
IT	-2.9%	0.2%
CY	-1.5%	
LV	-3.8%	-23.4%
LT	7.1%	3.1%
LU	-4.4%	4.5%
HU	-1.3%	0.7%
MT	10.6%	-8.1%
NL	-0.8%	0.1%
AT	2.5%	2.0%
PL	-8.7%	25.4%
PT	-7.1%	-0.7%
SI	-4.7%	-10.1%
SK	-16.2%	12.2%
FI	-0.3%	-5.2%
SE	0.5%	0.3%
UK	-0.5%	-0.6%
EU15	-3.6%	-4.8%
EU10	-1.7%	7.1%
EU25	-3.4%	-4.4%

Broadband access in the EU as at 1 July 2006

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



Date	DSL lines as % of all BB lines	Variation	
		since January 2003 (% points)	in each period (in % points)
January 2003	71.2%		
July 2003	72.7%	1.5%	1.5%
January 2004	74.6%	3.4%	2.0%
July 2004	77.0%	5.9%	2.4%
January 2005	79.3%	8.1%	2.3%
July 2005	80.2%	9.1%	0.9%
January 2006	81.3%	10.2%	1.1%
July 2006	81.6%	10.4%	0.3%

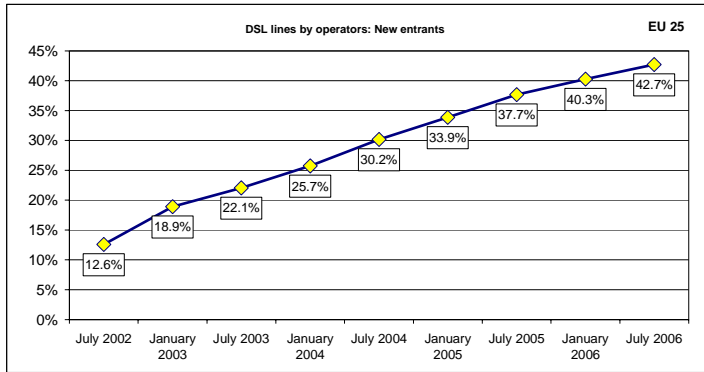


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	58.0%	59.7%	60.0%	61.5%	61.6%	61.5%	61.7%	62.0%	62.4%
CZ				20.8%	29.8%	46.5%	41.5%	47.5%	46.4%
DK	62.7%	66.8%	64.4%	65.0%	61.0%	61.5%	60.1%	62.1%	59.0%
DE	98.4%	98.2%	97.8%	96.4%	97.2%	96.5%	96.7%	96.2%	96.2%
EE				64.2%	49.5%	46.6%	50.0%	46.8%	49.0%
EL	20.2%	5.0%	16.7%	81.9%	90.4%	90.5%	98.2%	98.7%	99.0%
ES	79.0%	73.4%	73.0%	75.2%	75.4%	75.4%	77.1%	77.9%	78.9%
FR	71.5%	84.9%	87.0%	89.2%	91.4%	92.6%	93.8%	94.4%	94.7%
IE	73.7%	44.5%	56.7%	71.7%	85.1%	83.7%	81.5%	73.1%	73.9%
IT	88.8%	85.6%	87.5%	89.9%	92.0%	93.6%	93.7%	95.1%	95.7%
CY				99.7%	99.8%	94.9%	94.9%	94.1%	98.6%
LV					79.1%	69.6%	57.9%	52.9%	53.8%
LT				40.7%	38.6%	39.3%	40.9%	44.8%	46.8%
LU		92.0%	87.1%	86.9%	87.3%	88.1%	88.7%	89.6%	89.7%
HU				62.7%	64.6%	65.6%	65.0%	66.6%	63.9%
MT					83.2%	58.2%	57.3%	58.8%	58.8%
NL	21.3%	34.1%	43.0%	51.3%	57.9%	61.1%	60.5%	62.0%	60.1%
AT	37.0%	39.8%	42.6%	45.6%	50.3%	53.4%	56.0%	58.1%	59.6%
PL				46.3%	49.5%	76.4%	74.9%	71.9%	73.0%
PT	3.7%	20.3%	29.1%	36.9%	44.2%	49.7%	54.6%	57.9%	61.5%
SI				63.5%	70.5%	63.5%	61.2%	65.7%	67.8%
SK				50.9%	68.3%	73.9%	80.3%	75.8%	65.3%
FI				73.5%	69.9%	75.1%	78.3%	79.3%	81.6%
SE				58.9%	60.7%	63.8%	67.7%	67.0%	67.3%
UK				41.0%	44.3%	49.9%	56.9%	62.6%	68.5%
EU15	68.2%	71.2%	72.8%	75.3%	77.8%	80.0%	81.2%	82.5%	82.9%
EU10				50.5%	54.4%	63.3%	61.0%	61.9%	62.0%
EU25				74.6%	77.0%	79.3%	80.2%	81.7%	81.6%

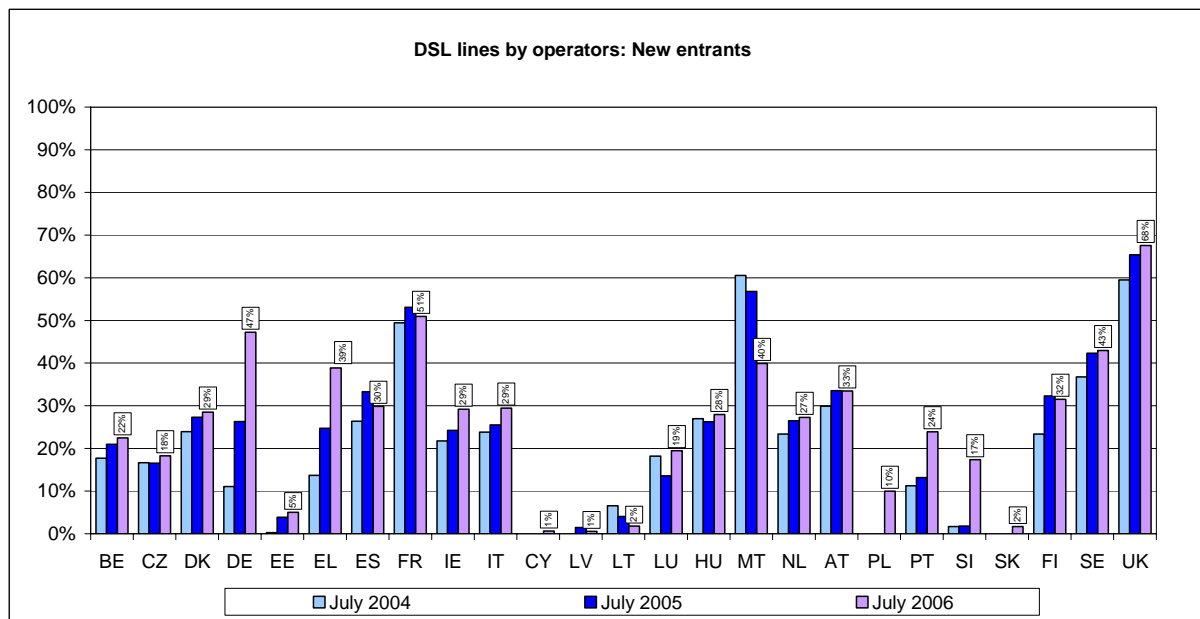
	Variation	
	July 06-05	July 05-04
BE	0.7%	0.2%
CZ	4.9%	11.8%
DK	-1.1%	-0.9%
DE	-0.3%	-1.1%
EE	-1.1%	0.5%
EL	0.8%	7.8%
ES	1.8%	1.7%
FR	0.9%	2.4%
IE	-7.6%	-3.6%
IT	2.0%	1.7%
CY	3.8%	-4.9%
LV	-4.1%	-21.2%
LT	5.9%	2.3%
LU	1.0%	1.3%
HU	-1.1%	0.4%
MT	1.5%	-25.9%
NL	-0.4%	2.6%
AT	3.6%	5.7%
PL	-1.8%	25.4%
PT	6.8%	10.5%
SI	6.6%	-9.3%
SK	-15.0%	11.9%
FI	3.3%	8.4%
SE	-0.5%	7.1%
UK	3.2%	9.1%
EU15	1.7%	3.4%
EU10	1.0%	6.6%
EU25	1.4%	3.2%

Broadband access in the EU as at 1 July 2006

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



DSL lines by operator: New entrants	Variation since January 2003 (% points)	Variation in each period (in % points)
January 2003	18.9%	
July 2003	22.1%	3.2%
January 2004	25.7%	6.8%
July 2004	30.2%	11.3%
January 2005	33.9%	15.0%
July 2005	37.7%	18.8%
January 2006	40.3%	21.4%
July 2006	42.7%	23.8%

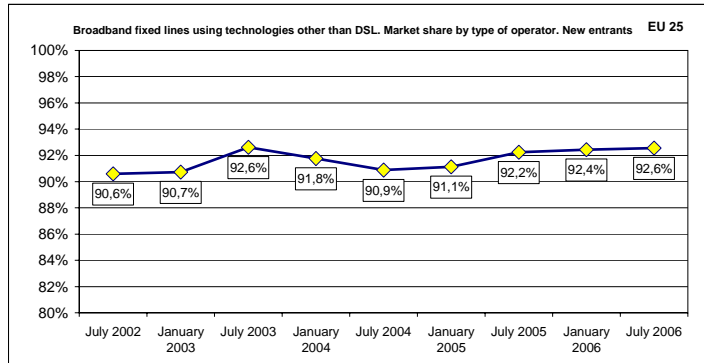


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	16.2%	15.5%	15.0%	13.5%	17.7%	19.3%	20.9%	22.2%	22.5%
CZ				28.6%	16.7%	5.7%	16.6%	11.0%	18.3%
DK	20.5%	18.9%	17.7%	21.3%	24.0%	25.2%	27.3%	28.1%	28.5%
DE	4.6%	5.8%	7.3%	8.9%	11.1%	17.3%	26.3%	38.3%	47.2%
EE				0.1%	0.2%	0.1%	3.9%	2.1%	5.0%
EL	100.0%	100.0%	100.0%	16.6%	13.7%	18.2%	24.7%	30.0%	38.8%
ES	22.3%	23.3%	24.1%	25.8%	26.4%	30.7%	33.3%	31.8%	29.9%
FR	8.4%	29.8%	37.1%	41.1%	49.4%	53.4%	53.1%	52.5%	50.9%
IE	1.3%	19.5%	20.9%	23.7%	21.7%	23.2%	24.3%	25.1%	29.2%
IT	13.9%	24.6%	23.8%	23.5%	23.8%	22.5%	25.5%	25.3%	29.4%
CY									0.7%
LV				#DIV/0!		0.7%	1.4%	1.0%	0.6%
LT				5.1%	6.6%	6.4%	4.1%	2.6%	1.8%
LU	#DIV/0!	4.3%	7.3%	11.4%	18.2%	14.4%	13.6%	17.0%	19.5%
HU				27.2%	27.0%	26.9%	26.3%	25.6%	28.0%
MT				#DIV/0!	60.5%	56.0%	56.8%	48.0%	39.9%
NL	9.7%	12.3%	16.2%	20.6%	23.4%	24.5%	26.5%	28.2%	27.3%
AT	17.8%	20.3%	22.4%	25.7%	29.9%	32.5%	33.6%	31.6%	33.4%
PL								11.4%	10.0%
PT	3.8%	17.3%	15.6%	13.1%	11.3%	9.7%	13.2%	17.3%	23.9%
SI				1.1%	1.7%	1.7%	1.8%	8.6%	17.3%
SK									1.7%
FI	15.4%	18.2%	24.0%	22.0%	23.4%	24.9%	32.3%	32.7%	31.5%
SE	26.1%	27.9%	27.3%	33.8%	36.8%	40.4%	42.3%	42.7%	43.0%
UK	38.1%	49.3%	48.8%	53.8%	59.5%	63.4%	65.4%	66.3%	67.6%
EU15	12.6%	18.9%	22.1%	26.0%	30.6%	34.8%	38.7%	41.5%	44.2%
EU10				11.9%	11.9%	8.2%	9.2%	12.6%	13.7%
EU25				25.7%	30.2%	33.9%	37.7%	40.3%	42.7%

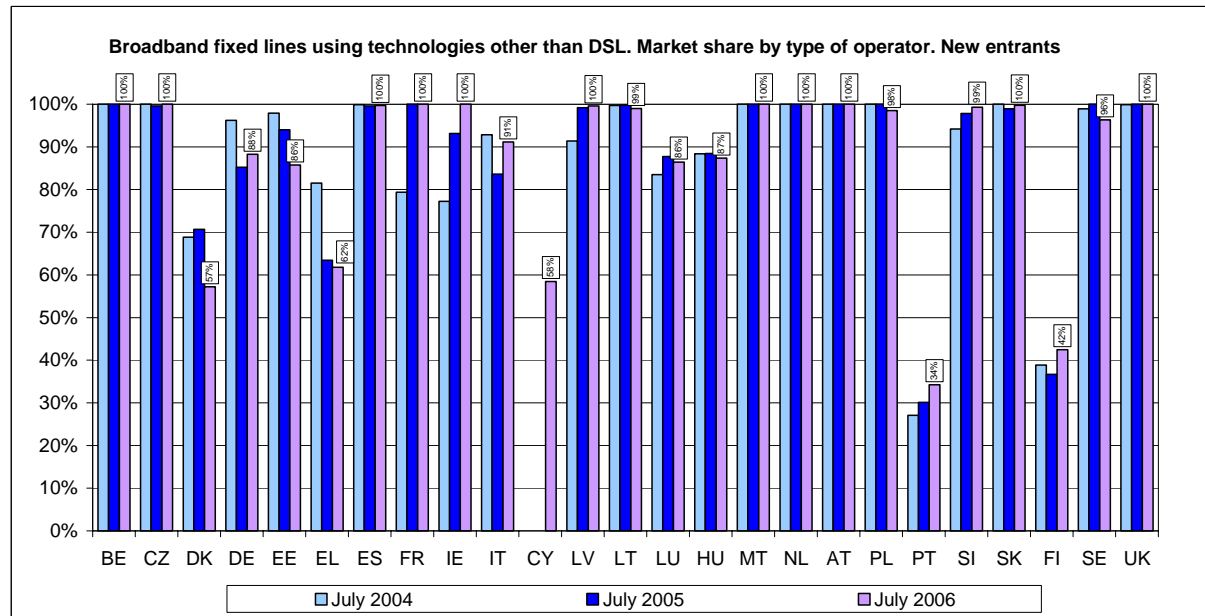
	Variation	
	July 06-05	July 05-04
BE	1.5%	3.2%
CZ	1.7%	-0.1%
DK	1.2%	3.3%
DE	21.0%	15.2%
EE	1.2%	3.6%
EL	14.1%	11.0%
ES	-3.4%	6.9%
FR	-2.1%	3.6%
IE	4.9%	2.5%
IT	3.9%	1.7%
CY	0.7%	
LV	-0.9%	1.4%
LT	-2.2%	-2.5%
LU	5.9%	-4.6%
HU	1.7%	-0.7%
MT	-16.9%	-3.7%
NL	0.8%	3.1%
AT	-0.1%	3.7%
PL	10.0%	
PT	10.7%	1.9%
SI	15.5%	0.1%
SK		1.7%
FI	-0.8%	9.0%
SE	0.6%	5.6%
UK	2.2%	5.9%
EU15	5.4%	8.2%
EU10	4.5%	-2.7%
EU25	5.0%	7.5%

**Broadband access in the EU as at 1 July 2006**

**Trends in broadband fixed lines using technologies other than DSL in EU 25 – New entrants**



Broadband lines using technologies other than DSL: New entrants	Variation since January 2003 (% points)		Variation in each period (in % points)
	Value	Change	
January 2003	90.7%		
July 2003	92.6%	1.9%	1.9%
January 2004	91.8%	1.0%	-0.9%
July 2004	90.9%	0.1%	-0.9%
January 2005	91.1%	0.4%	0.2%
July 2005	92.2%	1.5%	1.1%
January 2006	92.4%	1.7%	0.2%
July 2006	92.6%	1.8%	0.1%

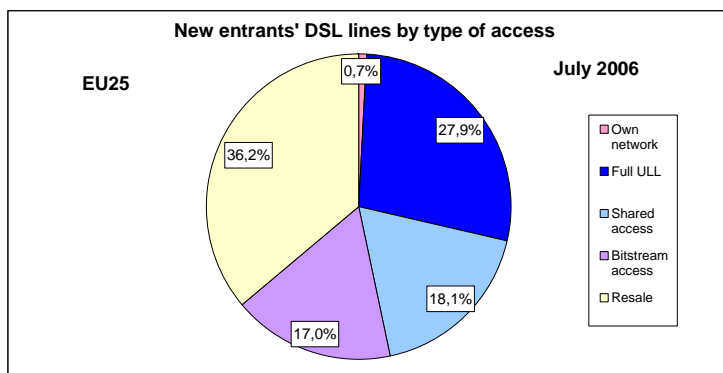


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006	July 2006
BE	99.7%	99.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
CZ				100.0%	100.0%	99.2%	100.0%	100.0%	100.0%
DK	68.3%	71.3%	74.8%	71.6%	68.8%	68.4%	70.7%	63.0%	57.2%
DE	100.0%	91.2%	94.0%	96.9%	96.2%	97.8%	85.2%	86.6%	88.3%
EE				97.7%	97.9%	96.6%	94.0%	88.6%	85.8%
EL	100.0%	81.3%	78.5%	77.7%	81.5%	90.9%	63.4%	64.2%	61.8%
ES	100.0%	100.0%	100.0%	99.9%	99.9%	99.7%	99.6%	99.5%	99.7%
FR	77.3%	79.6%	78.7%	79.3%	79.3%	80.0%	100.0%	100.0%	100.0%
IE	99.7%	100.0%	100.0%	75.1%	77.2%	89.8%	93.1%	96.9%	100.0%
IT	99.5%	100.0%	99.9%	99.1%	92.8%	91.3%	83.6%	87.6%	91.1%
CY									58.4%
LV					91.4%	98.2%	99.1%	99.5%	99.6%
LT				99.7%	99.7%	99.8%	99.8%	99.8%	99.0%
LU		68.5%	77.1%	82.5%	83.5%	80.9%	87.7%	86.5%	86.4%
HU				87.7%	88.4%	88.0%	88.4%	87.4%	87.3%
MT					100.0%	100.0%	100.0%	100.0%	100.0%
NL	100.0%	100.0%	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%	100.0%	100.0%
PL				100.0%	100.0%	100.0%	100.0%	97.7%	98.5%
PT	34.6%	32.4%	28.5%	26.5%	27.1%	28.8%	30.1%	32.5%	34.3%
SI				93.3%	94.2%	97.4%	97.8%	98.7%	99.3%
SK				100.0%	100.0%	100.0%	98.9%	99.4%	99.7%
FI	60.0%	56.8%	56.1%	39.1%	38.9%	36.3%	36.7%	37.2%	42.5%
SE	74.9%	75.3%	98.6%	98.8%	98.9%	98.6%	100.0%	100.0%	96.3%
UK	99.9%	99.8%	99.8%	99.8%	99.8%	99.9%	100.0%	100.0%	100.0%
EU15	90.6%	90.7%	92.6%	91.5%	90.5%	90.7%	91.7%	92.0%	92.0%
EU10				96.7%	96.8%	96.6%	97.0%	96.2%	96.4%
EU25				91.8%	90.9%	91.1%	92.2%	92.4%	92.6%

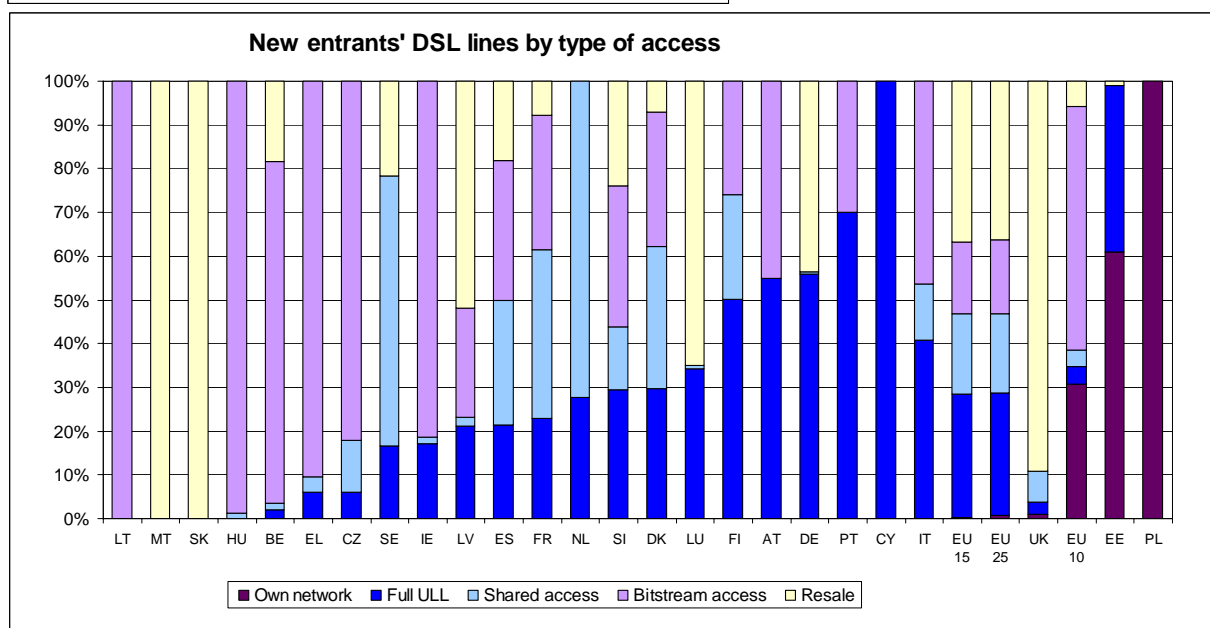
	Variation	
	July 06-05	July 05-04
BE	0.0%	0.0%
CZ	0.4%	-0.4%
DK	-13.5%	1.8%
DE	3.1%	-11.0%
EE	-8.2%	-3.9%
EL	-1.6%	-18.1%
ES	0.1%	-0.2%
FR	0	20.7%
IE	6.9%	15.9%
IT	7.5%	-9.2%
CY	58.4%	
LV	0.4%	7.8%
LT	-0.8%	0.1%
LU	-1.3%	4.2%
HU	-1.1%	0.1%
MT	0	0
NL	0	0
AT	0	0
PL	-1.5%	0
PT	4.2%	3.0%
SI	1.4%	3.6%
SK	0.8%	-1.1%
FI	5.8%	-2.2%
SE	-3.7%	1.1%
UK	0	0.2%
EU15	0.2%	1.3%
EU10	-0.6%	0.2%
EU25	0.3%	1.4%

Broadband access in the EU as at 1 July 2006

New entrants DSL lines by access type in EU 25



July 2006	
Own network	0.7
Full ULL	27.9
Shared access	18.1%
Bitstream access	17.0%
Resale	36.2%
<b>Total LLU</b>	<b>46.0%</b>



	Own network	Full ULL	Shared access	Bitstream access	Resale
BE	0.0%	2.1%	1.4%	78.2%	18.3%
CZ	0.0%	6.1%	11.8%	82.2%	0.0%
DK	0%	29.8%	32.4%	30.8%	7.0%
DE	0.0%	55.9%	0.5%	0.0%	43.6%
EE	61.0%	38.1%	0.0%	0.0%	0.9%
EL	0.0%	6.0%	3.6%	90.4%	0.0%
ES	0%	21.4%	28.3%	32.0%	18.2%
FR	0.0%	22.8%	38.7%	30.7%	7.8%
IE	0%	17.1%	1.5%	81.4%	0.0%
IT	0.0%	40.9%	12.7%	46.3%	0.0%
CY	0.0%	100.0%	0.0%	0.0%	0.0%
LV	0.0%	21.2%	2.0%	25.0%	51.8%
LT	0.0%	0.0%	0.0%	100.0%	0.0%
LU	0.0%	34.3%	0.8%	0.0%	64.9%
HU	0.0%	0.0%	1.1%	98.8%	0.0%
MT	0.0%	0.0%	0.0%	0.0%	100.0%
NL	0.0%	27.6%	72.4%	0.0%	0.0%
AT	0%	54.8%	0.0%	45.1%	0.0%
PL	100.0%	0.0%	0.0%	0.0%	0.0%
PT	0.0%	70.0%	0.0%	30.0%	0.0%
SI	0.0%	29.5%	14.3%	32.2%	24.0%
SK	0.0%	0.0%	0.0%	0.0%	100.0%
FI	0.0%	50.1%	23.9%	26.0%	0.0%
SE	0.0%	16.7%	61.5%	0.0%	21.7%
UK	1.0%	2.8%	7.1%	0.0%	89.1%
EU15	0%	28.3%	18.4%	16.4%	36.7%
EU10	30.6%	4.1%	3.8%	55.7%	5.8%
EU25	0.7%	27.9%	18.1%	17.0%	36.2%

Data on national population used in this report

	2002	2003	2004	2005/2006
BE	10 309 700	10 355 800	10 396 000	10 445 900
CZ	10 206 400	10 203 300	10 211 500	10 220 600
DK	5 368 400	5 383 500	5 397 600	5 411 400
DE	82 440 300	82 536 700	82 531 700 (e)	82 500 800
EE	1 361 200	1 356 000	1 350 600	1 347 000
EL	10 988 000	11 006 400	11 041 100	11 073 000
ES	40 850 500	41 550 600	42 345 300	43 038 000
FR	59 342 100	59 635 000	59 900 700	60 561 200
IE	3 899 900	3 963 600	4 027 500	4 109 200
IT	56 993 700	57 321 100	57 888 200	58 462 400
CY	705 500	715 100	730 400	749 200
LV	2 345 800	2 331 500	2 319 200	2 306 400
LT	3 475 600	3 462 600	3 445 900	3 425 300
LU	444 100	448 300	451 600	455 000
HU	10 174 900	10 142 400	10 116 700	10 097 500
MT	394 600	397 300	399 900	402 700
NL	16 105 300	16 192 600	16 258 000	16 305 500
AT	8 038 900	8 082 000	8 114 000	8 206 500
PL	38 632 500	38 218 500	38 190 600	38 173 800
PT	10 329 300	10 407 500	10 474 700	10 529 300
SI	1 994 000	1 995 000	1 996 400	1 997 600
SK	5 379 000	5 379 200	5 380 100	5 384 800
FI	5 194 900	5 206 300	5 219 700	5 236 600
SE	8 909 100	8 940 800	8 975 700	9 011 400
UK	59 139 900	59 328 900	59 651 500	60 034 500
EU 15	378 354 100	380 359 100	382 673 300	385 380 700
EU 10	74 669 500	74 200 900	74 141 300	74 104 900
EU 25	453 023 600	454 560 000	456 814 600	459 485 600

Source: Eurostat