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

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Broadband access in the EU as at 1 January 2006

DEFINITIONS	3
EU OVERVIEW: RETAIL FIXED BROADBAND LINES	4
DSL LINES	11
FIXED BROADBAND LINES USING TECHNOLOGIES OTHER THAN DSL	16
ANNEX 1: DATA ON LOCAL BROADBAND ACCESS (WHOLESALE AND RETAIL)	20
Total broadband access retail fixed lines in EU25.....	23
Total DSL retail lines in EU25	24
Total broadband fixed retail lines using technologies other than DSL in EU25.....	25
Fixed broadband access lines by operator in EU25	26
Fixed broadband access lines by technology in EU25.....	27
DSL access lines by operator in EU25	28
Broadband fixed lines using technologies other than DSL by operator in EU 25	29
Trends in fixed broadband access lines by operator in EU25 - Incumbents	30
Trends in fixed broadband access lines by technology in EU25 - DSL.....	31
Trends in DSL access lines by operator in EU25 – New entrants	32
Trends in broadband fixed lines using technologies other than DSL in EU 25 – New entrants	33
New entrants DSL lines by access type in EU 25.....	34

List of figures

Figure 1 EU countries by number of broadband lines	6
Figure 2 EU distribution of broadband lines by country (% of broadband lines)	6
Figure 3 Growth trend since January 2003	7
Figure 4 Broadband lines added, by country	7
Figure 5 New broadband fixed lines per 100 population.....	8
Figure 6 Penetration rate. Lines per 100 population.....	8
Figure 7 Penetration rate and speed of progress	9
Figure 8 Broadband lines market share.....	9
Figure 9 Trend in the percentage of broadband lines provided by the incumbent fixed operators ...	10
Figure 10 EU countries by number of DSL lines.....	12
Figure 11 EU distribution of DSL lines by country (% of DSL lines).....	12
Figure 12 Growth trend since January 2003	13
Figure 13 DSL lines added, by country	13
Figure 14 DSL lines market share by operator	14
Figure 15 Trend in the % of DSL lines provided by incumbent fixed operators	14
Figure 16 New entrants' DSL lines by type of access	15
Figure 17 New entrants' DSL lines by type of access.....	15
Figure 18 EU countries by number of broadband lines using other technologies.....	17
Figure 19 EU distribution of broadband lines using other technologies by country (% of lines)	17
Figure 20 Growth trend since January 2003	18
Figure 21 Broadband lines using other technologies added by country.....	18
Figure 22 Broadband lines using other technologies: market share.....	19
Figure 23 Trend in the % of lines using technologies other than DSL provided by new entrants ...	19

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 January 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 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 58 988 616 fixed broadband lines in the EU as of 1 January 2006, a 22% increase since 1 July 2006. Of these lines, 47 977 623 were DSL lines (81.3% of total) and 11 010 993 (18.7%) were provided using other transmission means, mostly cable modem.

Incumbent fixed operators provided 50% of these lines, continuing the downward trend recorded since 2003. This figure was 60.4% in January 2003, 57.5% in January 2004 and 54.3% in January 2005.

In the period between January 2005 and January 2006 a total of 19 500 282 new broadband lines were added, an increase of 49.4%. Although in relative terms this growth is lower than in the previous twelve month period (69.46%), in absolute numbers it is higher than the growth recorded between January 2004 and January 2005 (16 186 263 lines).

85% of the new lines were by means of xDSL technologies, while only 15% were connections using other type of technologies.

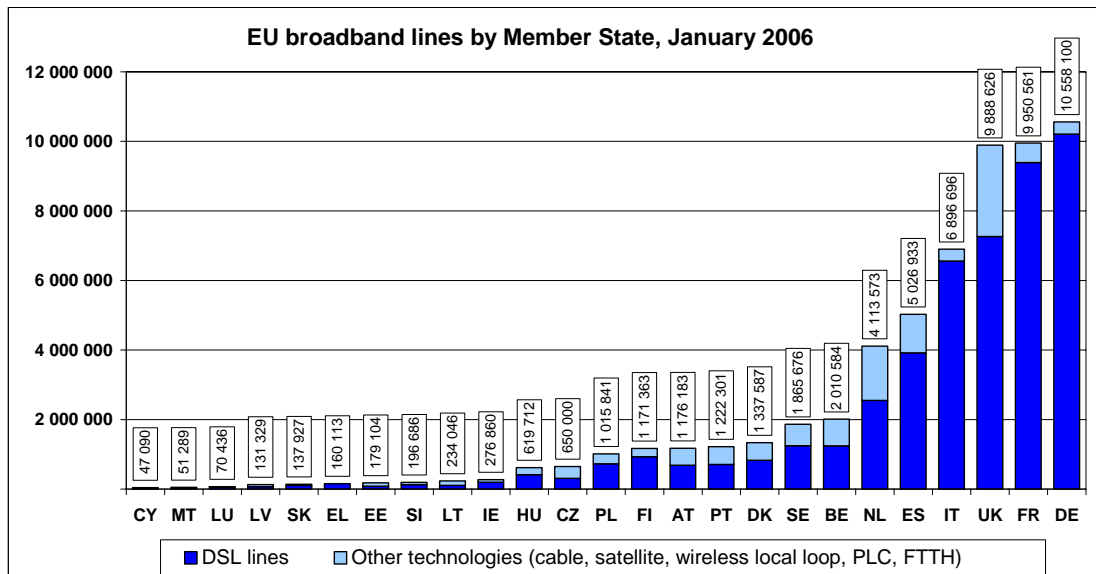
Table 1 shows how the broadband lines in the EU were distributed between the EU Member States at 1 January 2003, 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005 and 1 January 2006.

Table 1 Retail broadband lines in the EU by country

	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	877 364	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133	2 010 584
CZ			101 000	121 000	228 200	436 000	650 000
DK	459 673	606 457	727 906	921 477	1 039 378	1 188 431	1 337 587
DE	3 244 430	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369	10 558 100
EE		58 515	58 515	102 771	138 617	150 246	179 104
EL	1 856	2 155	10 483	25 386	51 455	93 583	160 113
ES	1 304 770	1 776 418	2 228 169	2 767 627	3 452 706	4 240 339	5 026 933
FR	1 656 288	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442	9 950 561
IE	7 387	9 469	34 050	67 530	138 116	177 121	276 860
IT	976 019	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374	6 896 696
CY			10 063	14 520	18 967	18 967	47 090
LV				33 904	56 448	85 381	131 329
LT		42 518	64 982	88 279	129 053	170 619	234 046
LU	7 455	10 282	15 942	25 334	37 019	53 049	70 436
HU			187 228	257 016	365 741	457 557	619 712
MT				13 738	38 054	41 551	51 289
NL	1 213 861	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315	4 113 573
AT	451 800	527 050	612 600	707 725	827 675	937 830	1 176 183
PL			173 239	219 901	536 738	710 726	1 015 841
PT	260 296	369 876	500 437	664 045	854 130	1 054 553	1 222 301
SI			60 398	76 339	118 031	156 669	196 686
SK			8 275	14 485	51 869	80 385	137 927
FI	269 700	334 950	447 444	572 100	779 929	974 614	1 171 363
SE	743 800	847 100	1 010 400	1 131 400	1 385 100	1 533 647	1 865 676
UK	1 333 056	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111	9 888 626
EU15	12 807 755	17 285 751	22 638 370	28 929 618	37 806 616	46 041 911	55 725 592
EU10		101 033	663 700	941 953	1 681 718	2 308 101	3 263 024
EU25		17 386 784	23 302 070	29 871 571	39 488 334	48 350 012	58 988 616

Figure 1 shows the distribution of broadband lines by country, Figure 2 presents this distribution in percentage terms at 1 January 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% of all broadband lines, followed by France and the UK, with 17% each. These three countries represent almost 52% of all EU broadband connections. Italy, Spain and the Netherlands follow. The new Member States contribute 3.3 million broadband lines, which represent 5.5% of the total, 1.2 points up from January 2005.

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

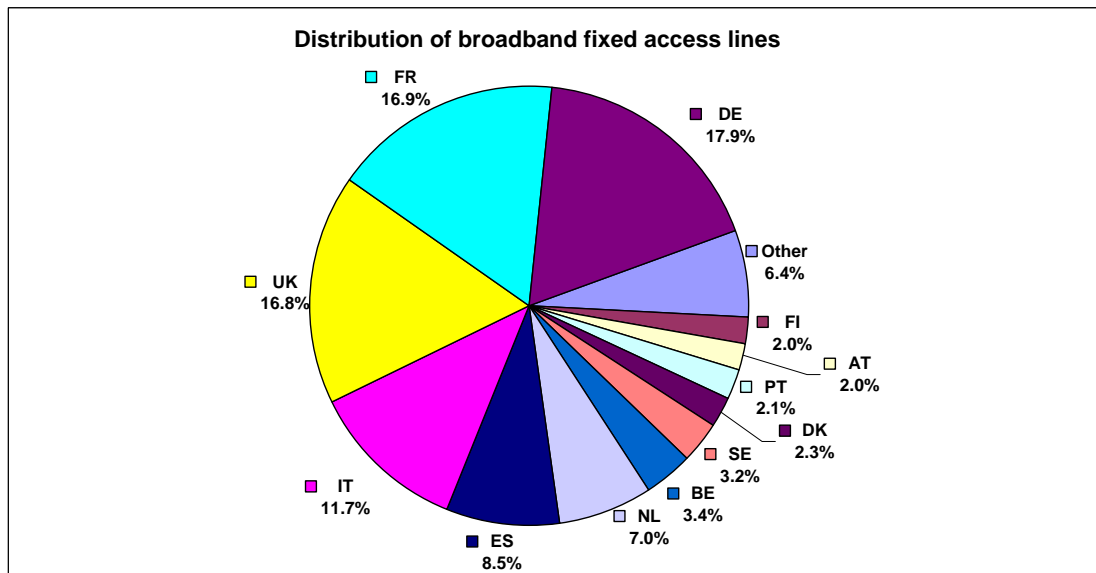
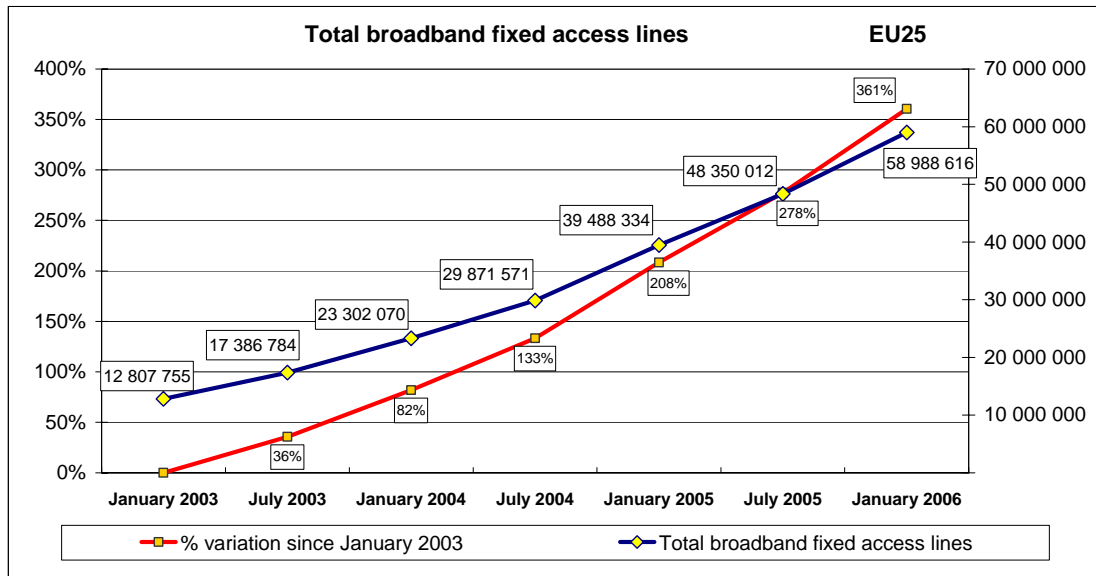


Figure 3 Growth trend since January 2003

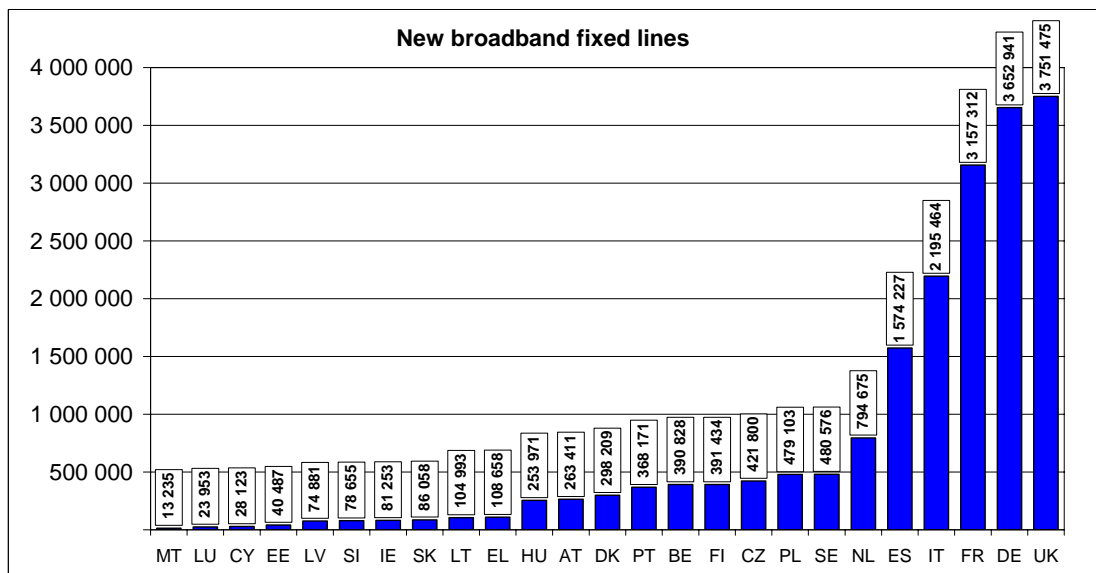


The number of broadband lines added per day in the period between January 2005 and January 2006 was 53 425, i.e. 9 079 more connections per day than the 44 346 new lines per day between January 2004 and January 2005. In other words, in January 2006 there were 20.5% more lines added every day than a year before.

The absolute growth in the second half of 2005 -10 638 604 lines- was the highest increase recorded so far, pushed by the 6 394 428 new lines sold in the last quarter.

Figure 4 shows that the UK was again the most dynamic broadband market in the EU, adding 3 751 475 new lines in the period between January 2005 and January 2006, followed this time by Germany with almost the same number of lines.

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, Finland and Luxembourg stand out from other MS with 7.5 and 7.3 lines per 100 inhabitants respectively, followed by the the Netherlands and the UK with 6.3 and 6.2. A group of 5 countries with around 5 lines per 100 population follows.

Figure 5 New broadband fixed lines per 100 population

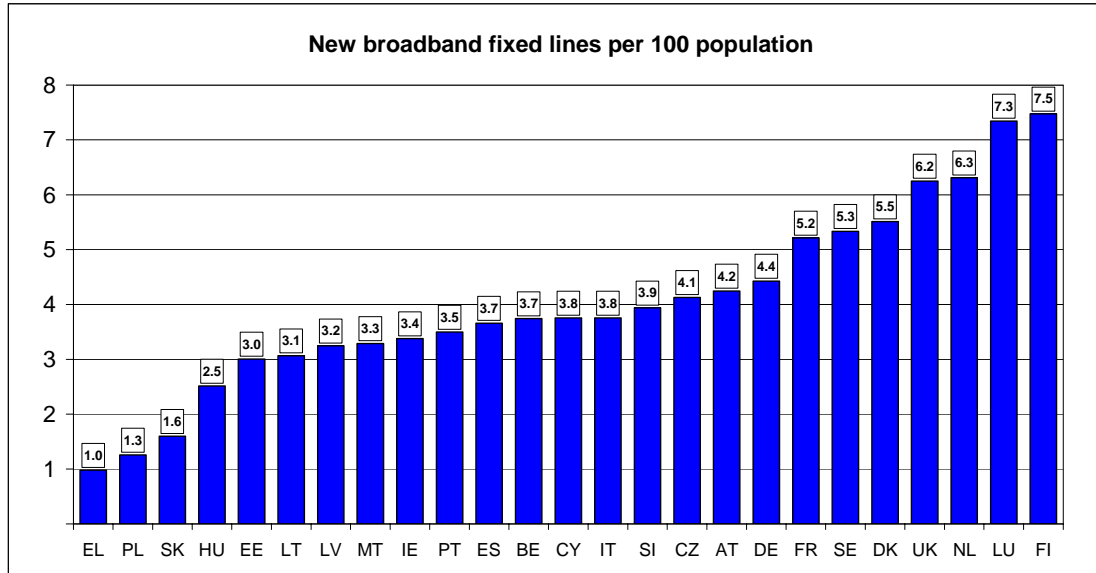


Figure 6 shows the penetration rate of broadband measured as the number of broadband lines per 100 population. The Netherlands has exceeded 25% penetration, with Denmark very close to this mark. Finland and Sweden have gone beyond 20%. These countries, along with Belgium, the UK, France and Luxembourg are above the EU15 level penetration rate, which stands at 14.46%, rising from 9.81% in January 2005. At EU25 level the penetration rate is 12.8%, up 4.2 points from 8.6% a year ago.

Figure 6 Penetration rate. Lines per 100 population

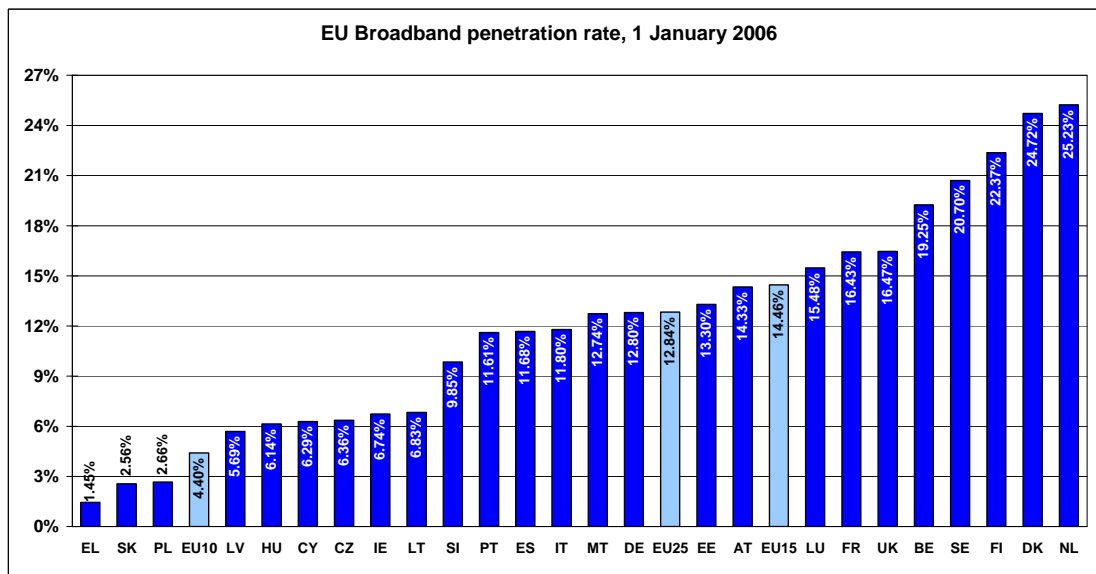


Figure 7 combines the penetration rate as at January 2006 and the growth of this indicator in percentage points during the period between January 2005 and January 2006.

Growth was higher in Finland and Luxembourg, followed by the Netherlands, UK, Denmark, Sweden and France. Germany has, for the first time, grown at a faster rate than the EU25 average.

Figure 7 Penetration rate and speed of progress

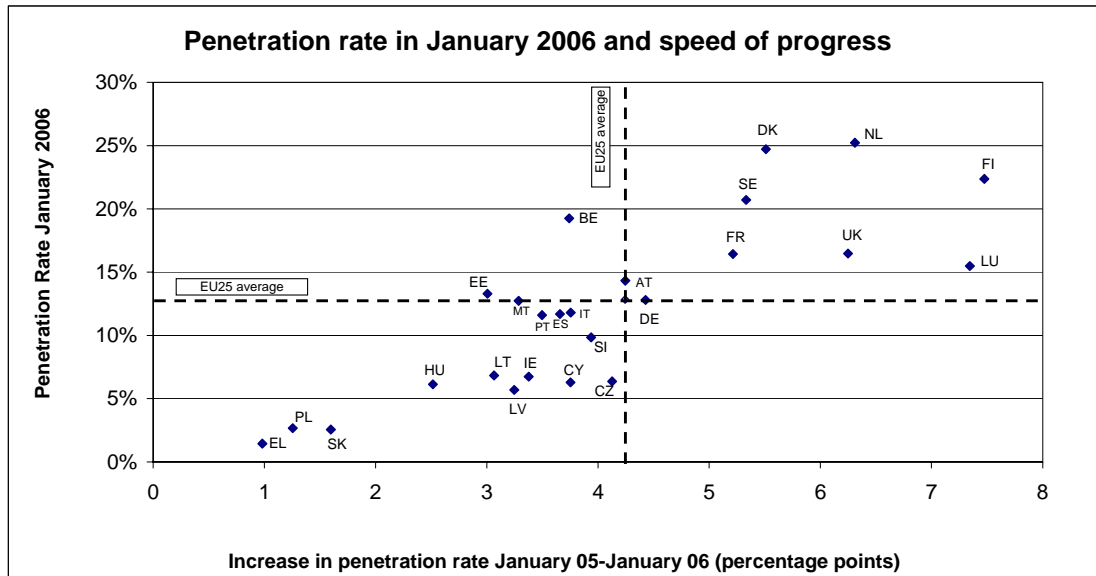


Figure 8 shows the percentage of broadband lines provided by the incumbent fixed operators and by the other operators. Figure 9 displays the trend in the percentage of broadband lines provided by the incumbent fixed operators.

Figure 8 Broadband lines market share

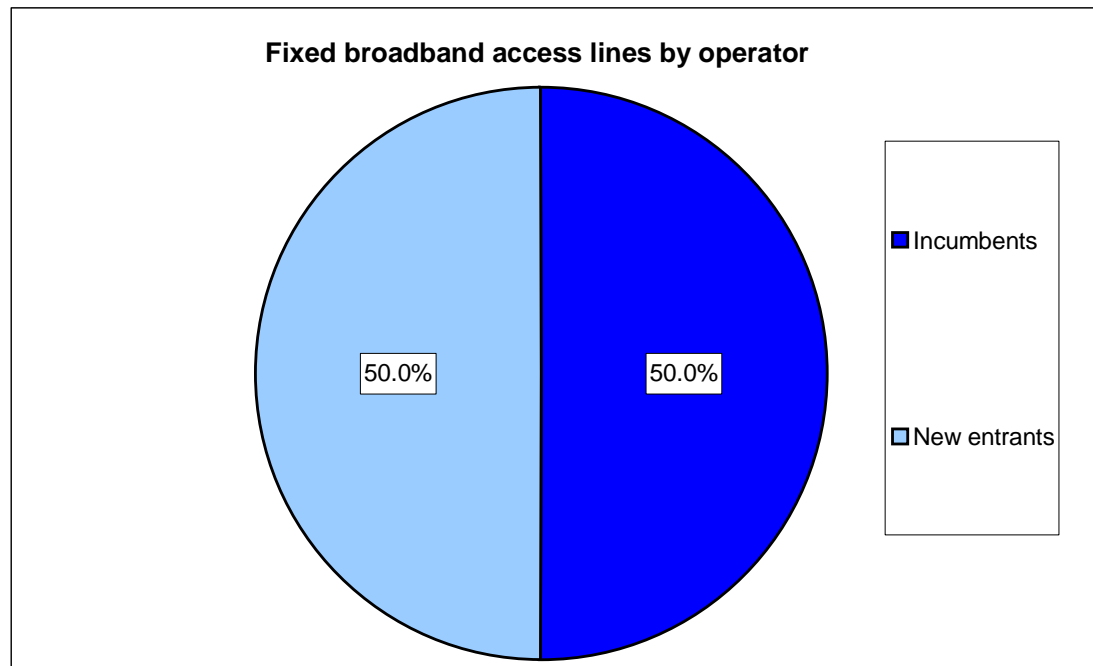
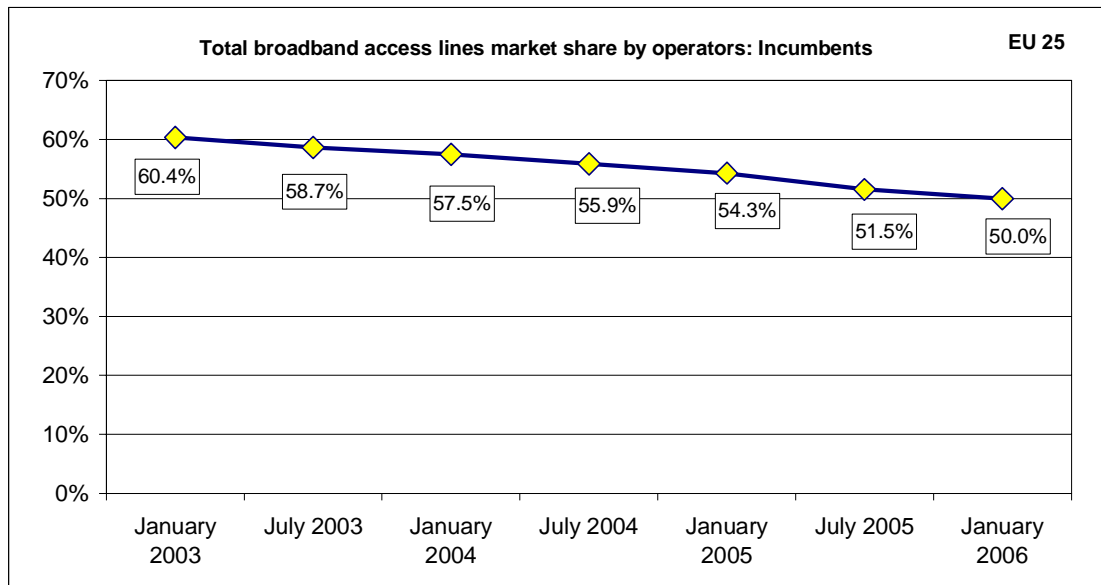


Figure 9 Trend in the percentage of broadband lines provided by the incumbent fixed operators



DSL LINES

There were 47 977 623 DSL lines in the EU as of 1 January 2006, a 53.15% increase since 1 January 2005.

In the period between January 2005 and January 2006 a total of 16 650 929 new DSL lines were added. This represents 2 711 629 more lines than the 13 939 300 new lines installed in the period between January 2004 and January 2005.

Incumbent fixed operators provided 59.7% of these lines, down from 66.1% in January 2005 and 74.3% in January 2004.

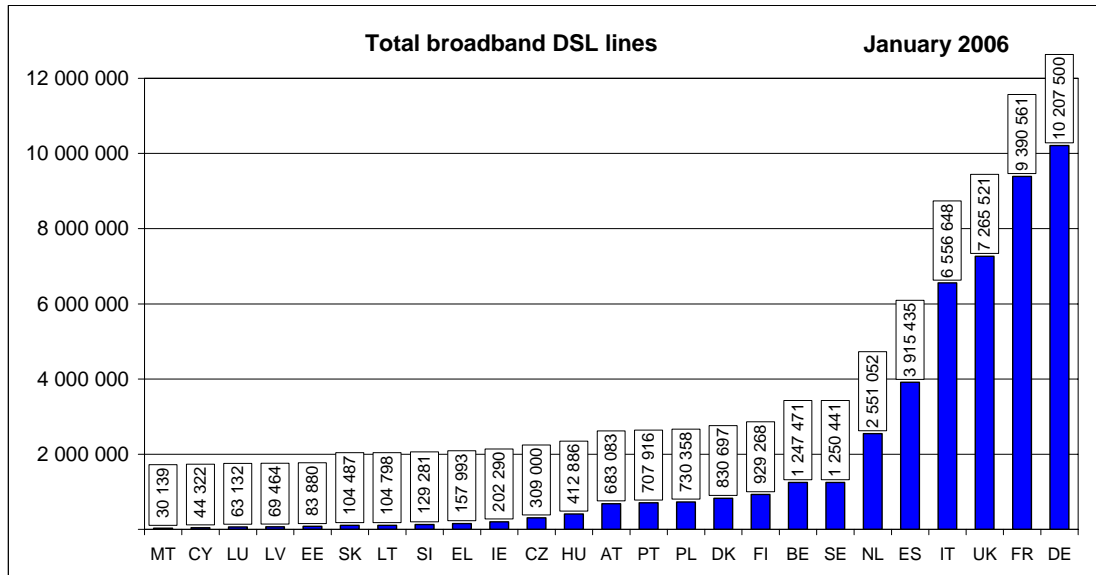
Table 2 shows how the DSL lines in the EU were distributed between the EU Member States at 1 January 2003, 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005 and 1 January 2006.

Table 2 DSL retail lines in the EU by country

	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	523 619	627 970	765 183	889 294	996 118	1 113 641	1 247 471
CZ			21 000	36 000	106 000	181 000	309 000
DK	306 944	390 692	473 359	562 009	638 961	714 529	830 697
DE	3 185 015	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941	10 207 500
EE		37 558	37 558	50 906	64 628	75 133	83 880
EL	93	359	8 588	22 937	46 547	91 869	157 993
ES	957 204	1 297 563	1 676 466	2 086 172	2 604 067	3 268 602	3 915 435
FR	1 406 769	2 099 933	3 262 800	4 490 487	6 293 249	7 802 442	9 390 561
IE	3 287	5 369	24 400	57 445	115 583	144 376	202 290
IT	835 525	1 387 658	2 158 458	3 223 188	4 402 585	5 175 270	6 556 648
CY			10 033	14 490	17 994	17 994	44 322
LV				26 815	39 281	49 465	69 464
LT		15 444	26 438	34 074	50 688	69 804	104 798
LU	6 858	8 960	13 860	22 128	32 607	47 048	63 132
HU			117 369	165 980	239 810	297 237	412 886
MT				11 426	22 145	23 799	30 139
NL	413 861	679 508	978 044	1 374 129	1 884 561	2 204 067	2 551 052
AT	179 600	224 650	279 600	355 725	442 075	525 230	683 083
PL			80 239	108 901	410 186	532 284	730 358
PT	52 810	107 537	184 860	293 435	424 169	576 258	707 916
SI			38 330	53 840	74 922	95 932	129 281
SK			4 210	9 900	38 334	64 539	104 487
FI	215 200	271 000	328 704	400 000	585 650	763 283	929 268
SE	439 800	495 300	595 200	686 200	883 200	1 038 747	1 250 441
UK	590 278	1 099 518	1 804 609	2 753 061	4 203 651	5 784 002	7 265 521
EU15	9 116 863	12 580 037	17 052 217	22 502 351	30 262 706	37 388 305	45 959 008
EU10		53 002	335 177	512 332	1 063 988	1 407 187	2 018 615
EU25		12 633 039	17 387 394	23 014 683	31 326 694	38 795 492	47 977 623

Figure 10 displays the distribution of DSL lines by country, Figure 11 presents this distribution in percentage terms at 1 January 2006 and Figure 12 shows the growth rate since January 2003 (EU15 for January 2003).

Figure 10 EU countries by number of DSL lines



Germany accounts for more than 21% of all DSL lines, followed by France with almost 20% and the UK with more than 15%. These three countries provide 56% of all DSL lines, as shown in Figure 11. The new Member States contribute 2 million DSL lines, which represent 4.2% of the total DSL lines.

Figure 11 EU distribution of DSL lines by country (% of DSL lines)

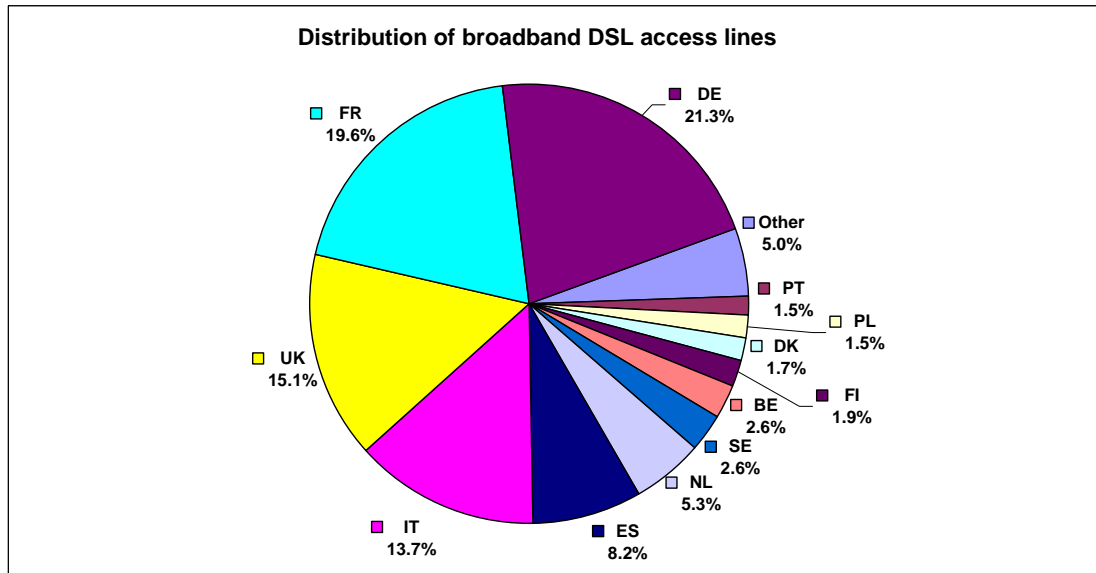
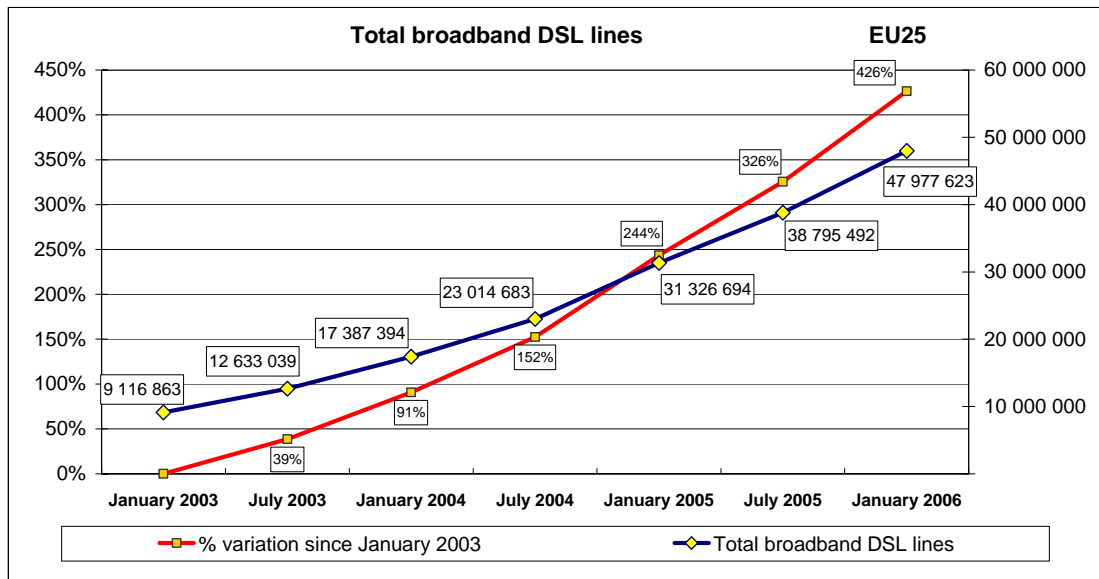


Figure 12 Growth trend since January 2003



The number of DSL lines added each day in the period between January 2005 and January 2006 was 45 619, which means that 19.5% more lines per day were added than in the period between January 2004 and January 2005, when 38 190 new DSL connections per day were recorded.

Germany added almost 3.5 million new lines over the period, followed by France, the UK and Italy.

Figure 13 DSL lines added, by country

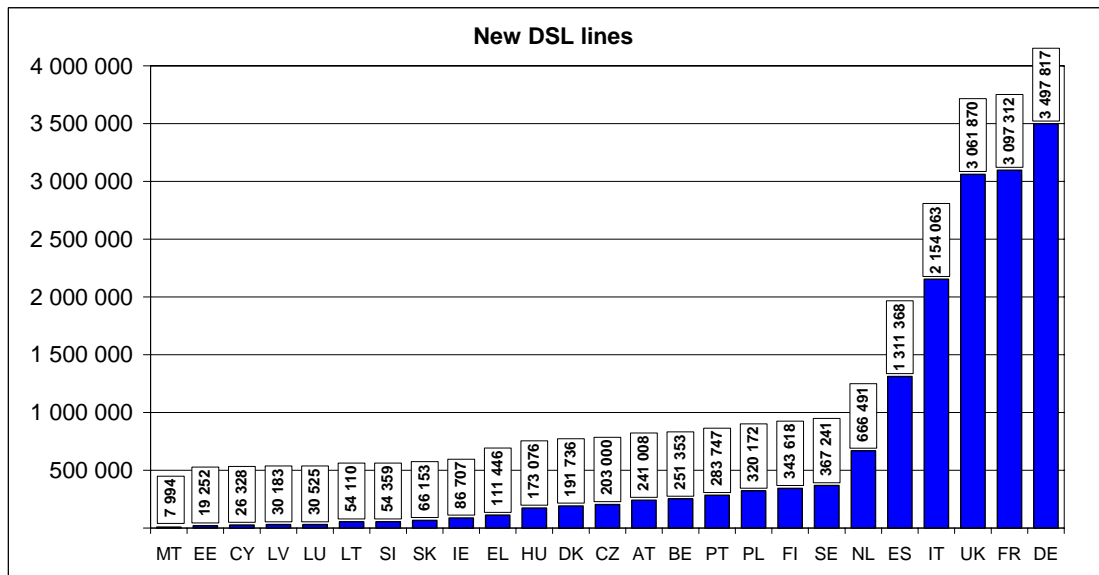


Figure 14 shows the percentage of DSL lines provided by the incumbent fixed operators and the new entrants. Figure 15 displays the trend in the percentage of DSL lines provided by incumbent fixed operators.

Figure 14 DSL lines market share by operator

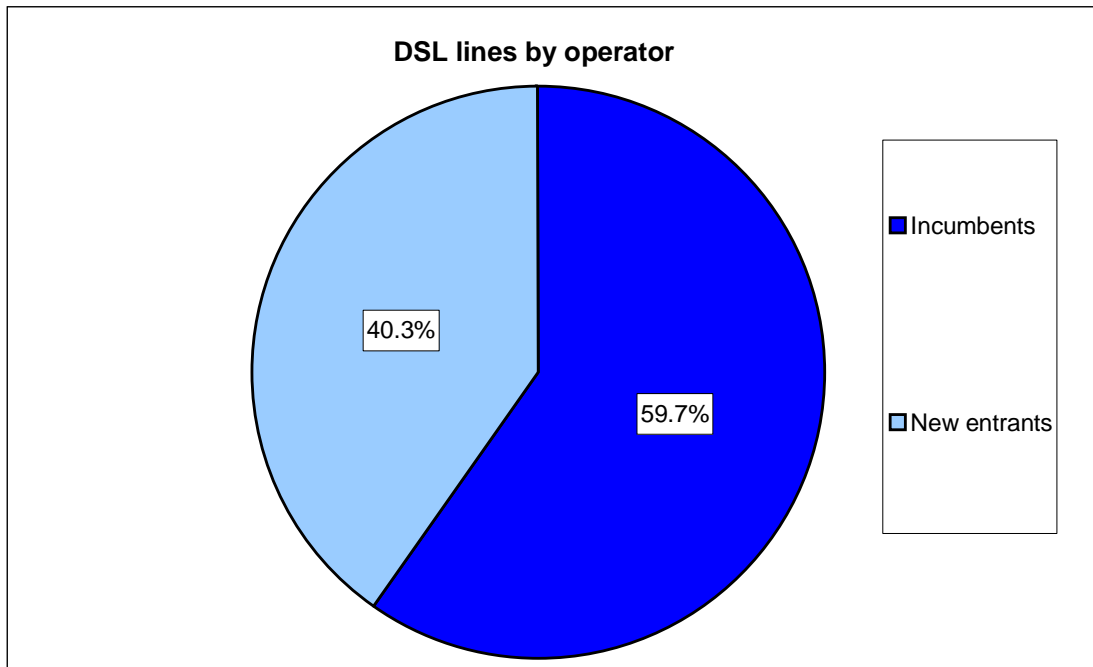


Figure 15 Trend in the % of DSL lines provided by incumbent fixed operators

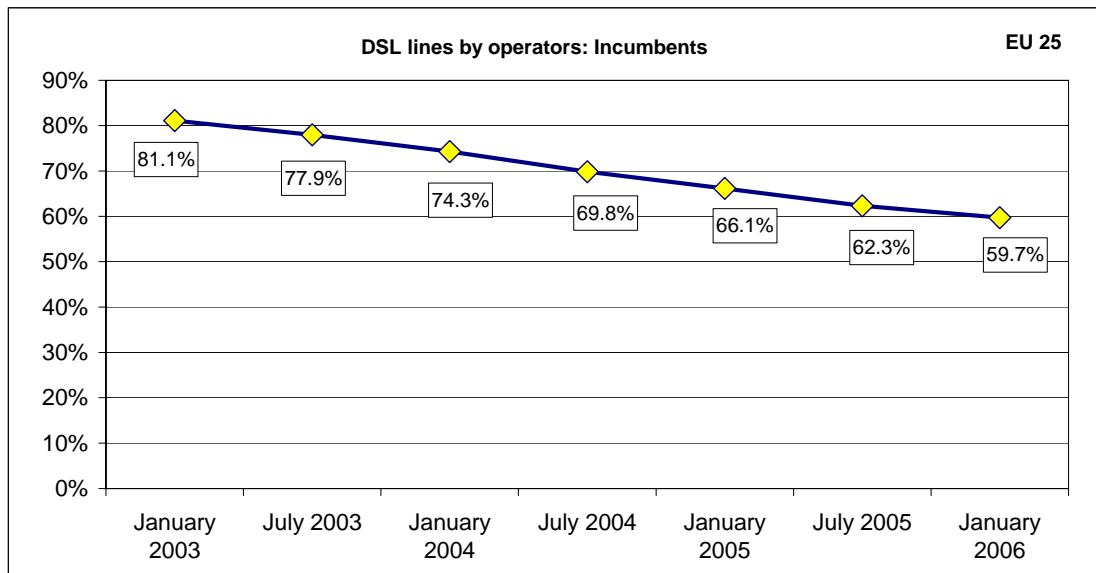


Figure 16 displays the type of access used by new entrants' to provide DSL lines to their customers. Local Loop Unbundling (fully unbundled lines and shared access) is now the main wholesale access for new entrants with 42.7% of DSL lines, up from 37.6% in January 2005. New entrants are gradually shifting from resale and bitstream access towards local loop unbundling in the provision of broadband services, as can be seen in Figure 17. Growth in resale lines in the last year has been driven by Germany and the UK.

Figure 16 New entrants' DSL lines by type of access

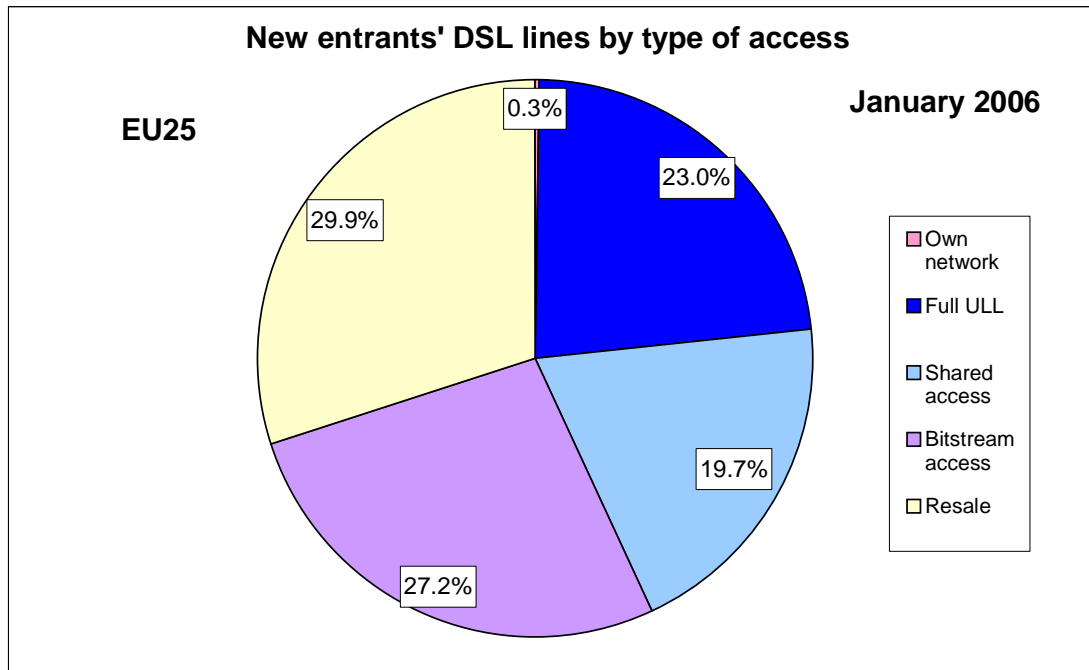
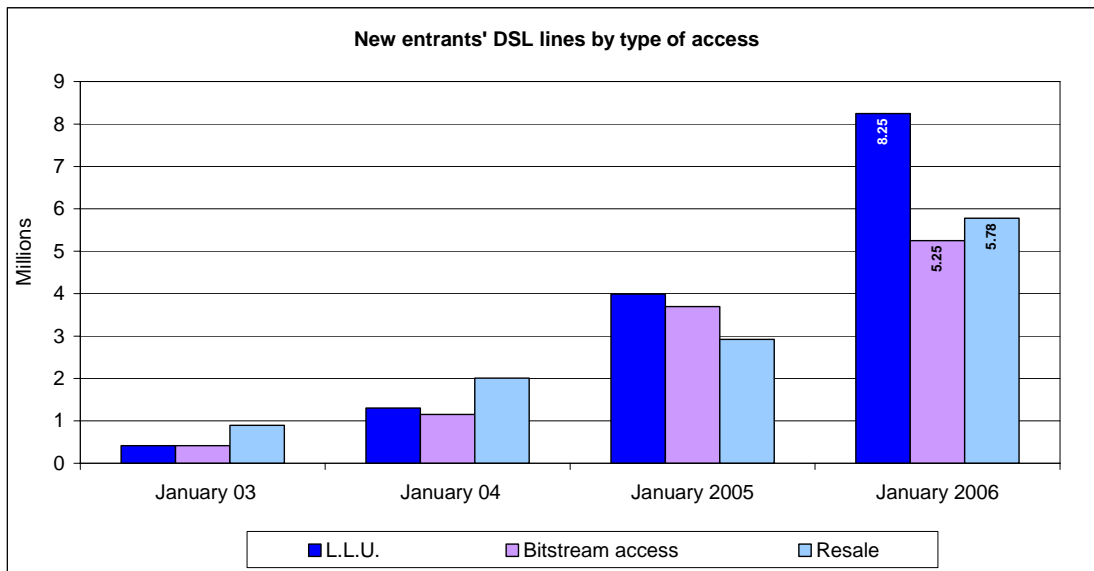


Figure 17 New entrants' DSL lines by type of access



FIXED BROADBAND LINES USING TECHNOLOGIES OTHER THAN DSL
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There were 11 010 993 broadband lines using technologies other than DSL in the EU as of 1 January 2006. 2 849 354 lines were added, which represents a 34.9% increase since 1 January 2005. Net additions in the period between January 2005 and January 2006 were higher than between January 2004 and January 2005, when 2 246 963 new lines were sold.

Alternative operators provided 92.4% of these lines, 1.3 points higher than the percentage of January 2005.

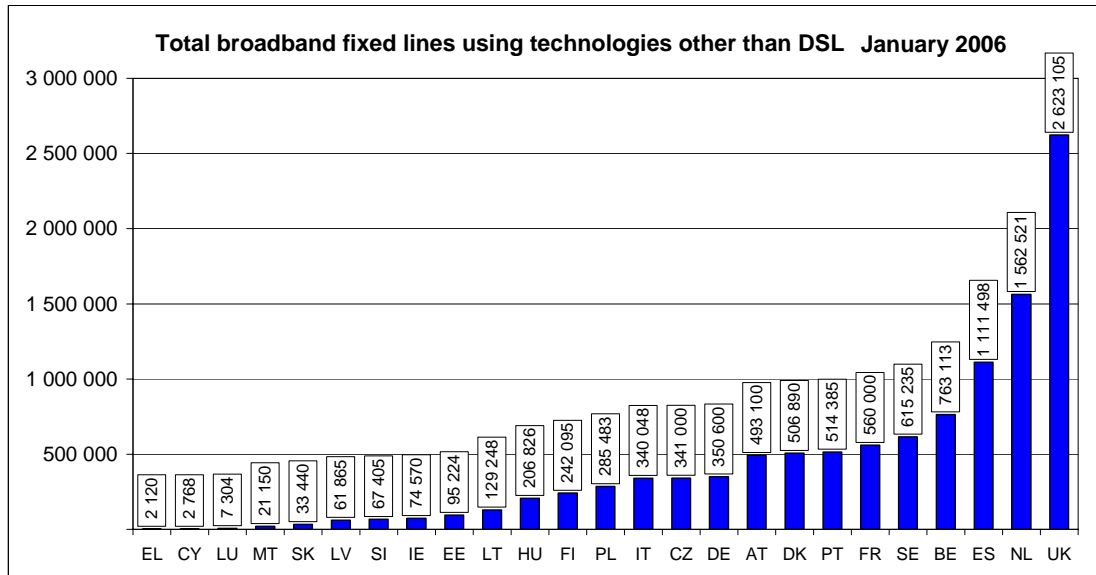
Table 3 shows how the non-DSL broadband lines in the EU were distributed between the EU Member States at 1 January 2003, 1 July 2003, 1 January 2004, 1 July 2004, 1 January 2005, 1 July 2005 and 1 January 2006.

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

	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	353 745	417 897	479 553	555 379	623 638	690 492	763 113
CZ			80 000	85 000	122 200	255 000	341 000
DK	152 729	215 765	254 547	359 468	400 417	473 902	506 890
DE	59 415	87 262	169 371	129 106	195 476	296 428	350 600
EE		20 957	20 957	51 865	73 989	75 113	95 224
EL	1 763	1 796	1 895	2 449	4 908	1 714	2 120
ES	347 566	478 855	551 703	681 455	848 639	971 737	1 111 498
FR	249 519	313 707	393 854	425 000	500 000	520 000	560 000
IE	4 100	4 100	9 650	10 085	22 533	32 745	74 570
IT	140 494	198 536	243 481	280 309	298 647	346 104	340 048
CY			30	30	973	973	2 768
LV				7 089	17 167	35 916	61 865
LT		27 074	38 544	54 205	78 365	100 815	129 248
LU	597	1 322	2 082	3 206	4 412	6 001	7 304
HU			69 859	91 036	125 931	160 320	206 826
MT				2 312	15 909	17 752	21 150
NL	800 000	900 000	930 000	998 400	1 200 000	1 438 248	1 562 521
AT	272 200	302 400	333 000	352 000	385 600	412 600	493 100
PL			93 000	111 000	126 551	178 442	285 483
PT	207 486	262 339	315 577	370 610	429 961	478 295	514 385
SI			22 068	22 499	43 109	60 737	67 405
SK			4 065	4 585	13 535	15 846	33 440
FI	54 500	63 950	118 740	172 100	194 279	211 331	242 095
SE	304 000	351 800	415 200	445 200	501 900	494 900	615 235
UK	742 778	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109	2 623 105
EU15	3 690 892	4 705 714	5 586 153	6 427 267	7 543 910	8 653 606	9 766 584
EU10		48 031	328 523	429 621	617 729	900 914	1 244 409
EU25		4 753 745	5 914 676	6 856 888	8 161 639	9 554 520	11 010 993

Figure 18 displays the distribution by country, Figure 19 presents this distribution in percentage terms at 1 January 2004 and Figure 20 shows the growth rate since January 2003.

Figure 18 EU countries by number of broadband lines using other technologies



The UK accounts for 24% of all broadband lines using other technologies, as shown in Figure 19. The Netherlands has the second largest individual share, with 14%, followed by Spain and Belgium with 10% and 7% respectively. These four countries account for 55% of this category of broadband line in the EU.

Figure 19 EU distribution of broadband lines using other technologies by country (% of lines)

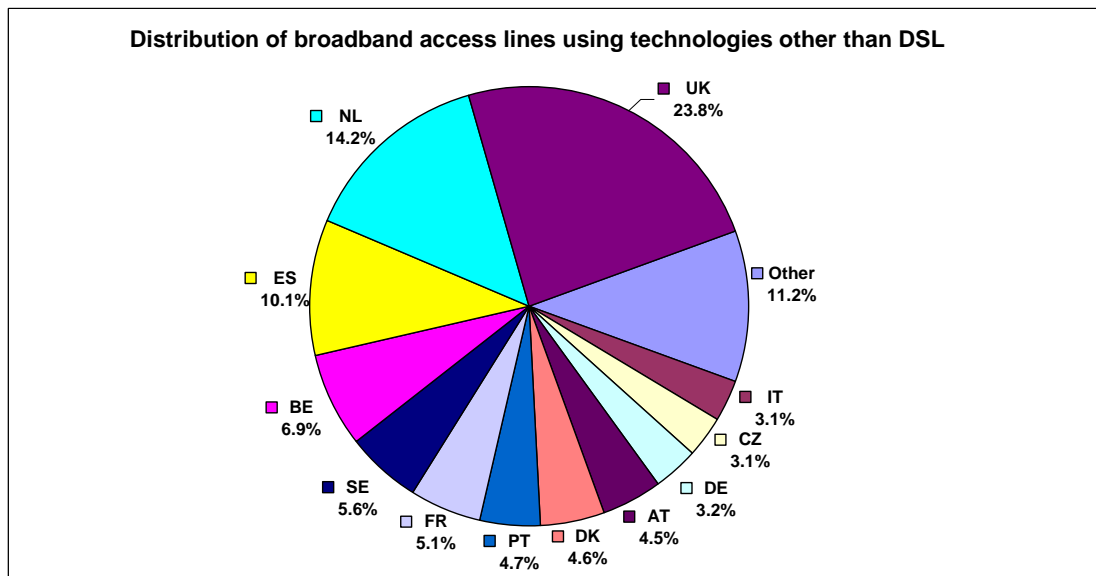
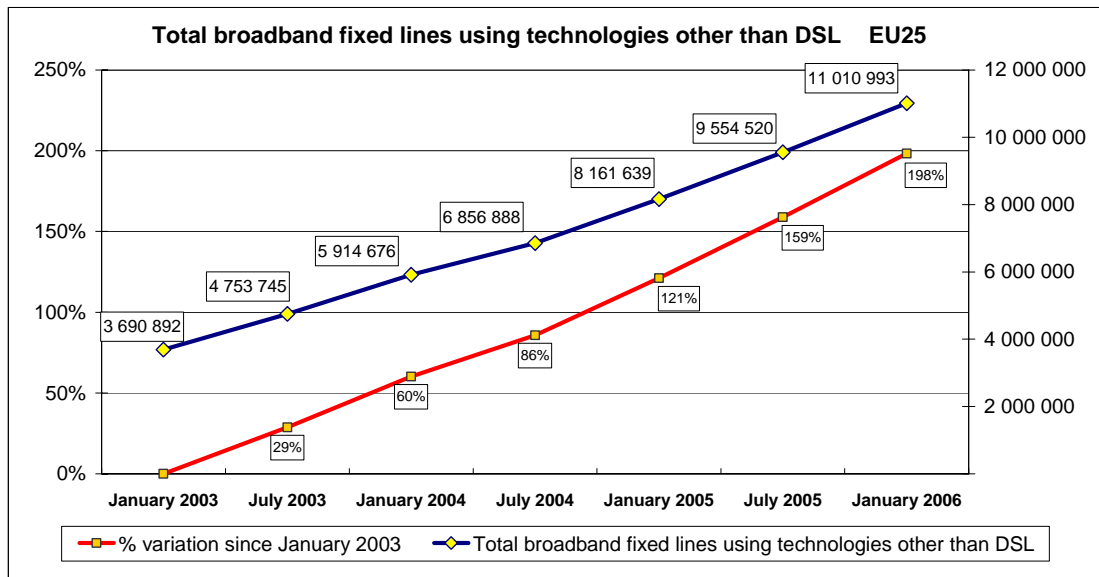


Figure 20 Growth trend since January 2003



7 806 broadband lines using other technologies were added each day in the period between January 2005 and January 2006. This compares to the 6 156 new lines per day between January 2004 and January 2005 and represents a 26.8% increase.

The UK added 689 605 lines using technologies other than DSL. The Netherlands and Spain altogether also added over half a million lines. In all the other countries combined the total number of new lines was 1.5 million. In Greece the growth was negative due to the reduction in the number of leased lines reported.

Figure 21 Broadband lines using other technologies added by country

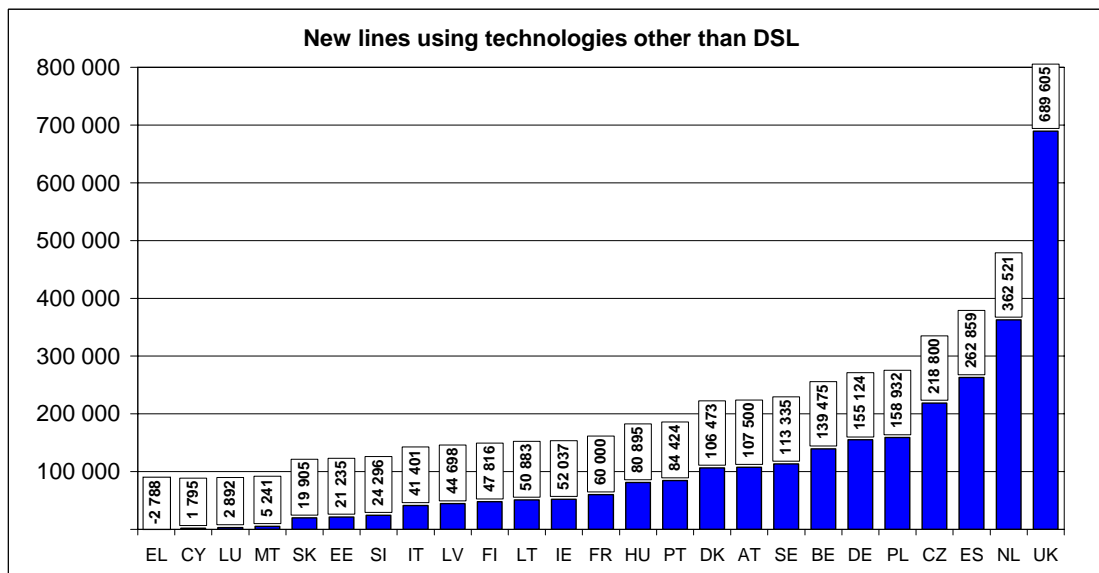


Figure 22 and 23 show the percentage of broadband lines using other technologies provided by the incumbent fixed operators and the alternative operators and the trend since January 2003.

Figure 22 Broadband lines using other technologies: market share

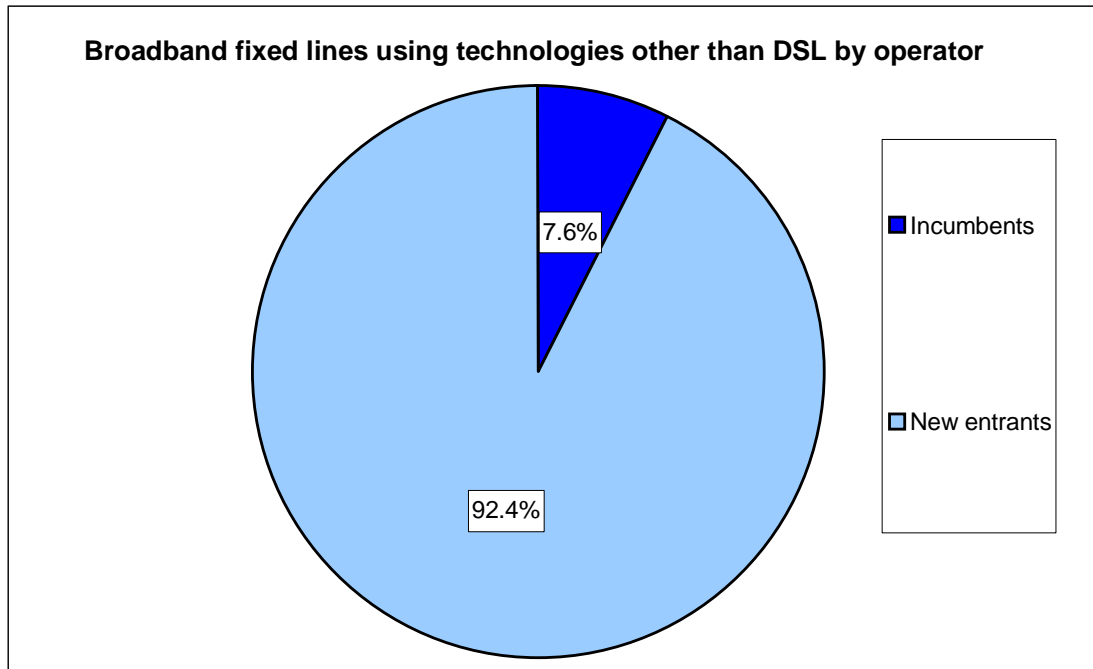
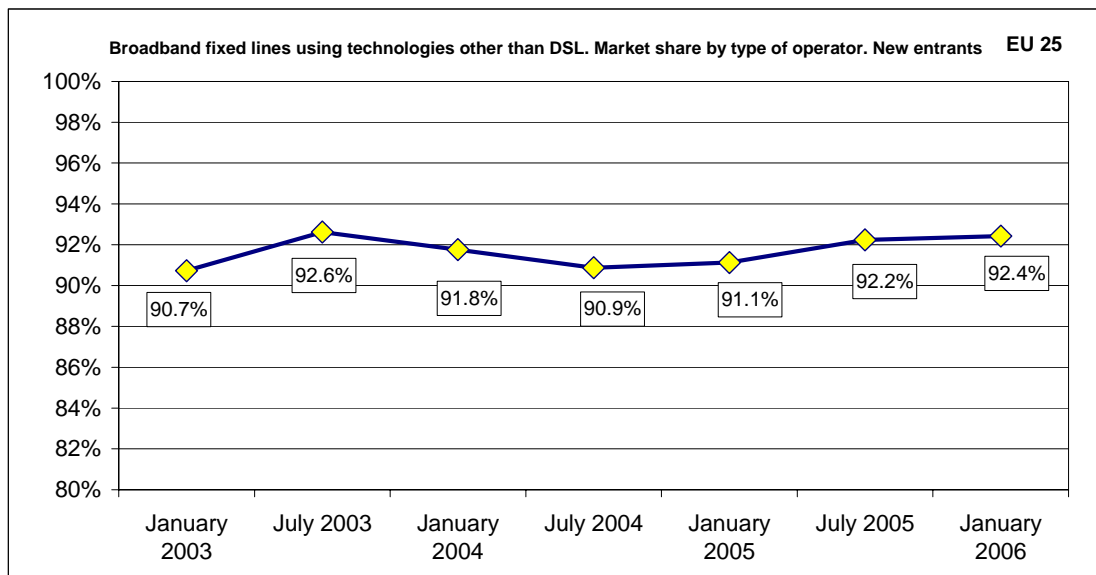


Figure 23 Trend in the % of lines using technologies other than DSL provided by new entrants



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 January 2006

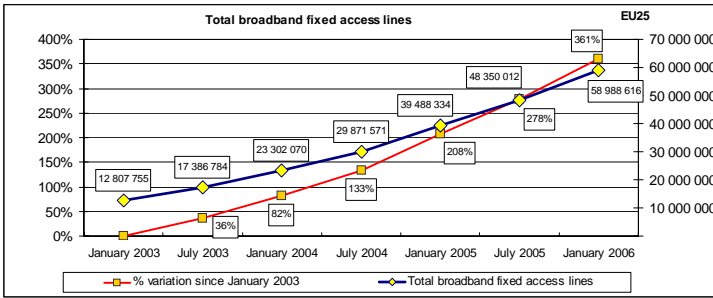
Country	Incumbent's PSTN activated main lines	Fully unbundled lines supplied by the incumbent to new entrants			Shared access lines supplied by the incumbent to new entrants			Wholesale DSL lines supplied			
		Unbundled lines	Requested lines	N. of agreements	Shared lines	Requested lines	N. of agreements	Bitstream access		Simple resale	
								No. of lines	No. of agreements	No. of lines	No. of agreements
Belgium	4 299 861	7 428	250	8	1 854	2	8	205 093	11	74 470	18
Czech Republic	3 149 000	1 900	n.a.	4	4 980	n.a.	4	n.a.	n.a.	61 300	19
Denmark	3 272 341	66 555	n.a.	21	69 021	n.a.	7	96 593	11	13 875	11
Germany	35 600 000	3 250 000		100	6 000		18	1 500	3	1 600 000	n.a.
Estonia	409 000	3 610	3 790	n.a.						n.a.	
Greece	5 500 000	5 018	244	12	1 866	50	2	40 439	10		
Spain	15 642 543	155 731	21 272	13	279 029	14,212	10	809 036	30		
France	33 150 028	597 857		21	2 229 031		21	1 939 928	5	167 210	20
Ireland	1 453 000	3 494	440	3	1 484	3	4	45 757	9		
Italy	25 206 000	1 341 567	37 490	25	159 616	13,511	6	890 000	239		
Cyprus	401 368										n.a.
Latvia	600 000			2			2	1 143	11		
Lithuania	765 006							2 681	12		
Luxembourg	241 000	3 537	741	4	114	1	4			7 528	6
Hungary	3 356 000	14	18	6	26	43	4	105 535	20		
Malta	203 000									14 470	19
Netherlands	6 907 000	121 626	n.a.	10	596 620	n.a.	10	n.a.	5		
Austria	2 750 000	127 800	6 411	29	83	n.a.	29	106 000	n.a.	n.a.	n.a.
Poland	8 741 000										
Portugal	3 769 410	72 013	3 708	3	6		2	50 961	8		
Slovenia	600 000	847	636	3		10,380		10 243	12		
Slovakia	1 176 673										
Finland	2 088 640	258 229	n.a.	n.a.	58 466	n.a.	n.a.	103 747	n.a.	n.a.	n.a.
Sweden	5 000 000	58 561	n.a.	131	315 680	n.a.	1312	3 200	26	156 000	n.a.
United Kingdom	28 700 000	99 022		53	92 978		29	876 008	24	3 746 935	619
EU15	173 579 823	6 168 438	70556	433	3 811 848	27 779	1 462	5 168 262	381	5 766 018	674
EU10	19 401 047	6 371	4 444	15	5 006	10 423	10	119 602	55	75 770	38
EU25	192 980 870	6 174 809	75 000	448	3 816 854	38 202	1 472	5 287 864	436	5 841 788	712

BROADBAND RETAIL LINES, 1 January 2006

January 06		New entrants' DSL lines on PSTN January 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	Fibre to the home	Satellite	PLC	Other	Public access WIFI Hotspots	Total (exc. WIFI)	WLL	Cable modem	Leased lines	3G	Fibre to the home	Satellite	PLC	Other	Public access WIFI Hotspots	Total (exc. WIFI)
BE	970 668		4 205	2 010	196 118	74 470	276 803											3 597	757 388	2 047						81	763 113
CZ	275 000		34 000				34 000			n.a.								188 000	138 000	n.a.		11 000	4 000	n.a.			341 000
DK	597 035		62 179	79 415	81 979	10 089	233 662	3 477	177 394	3 348					3 431	711	187 650	6 822	212 207	4 953		11 841	111	105	83 201	268	319 240
DE	6 300 000		2 300 000	6 000	1 500	1 600 000	3 907 500			44 000		n.a.	3 000				47 000	n.a.	240 000	n.a.		n.a.	54 000	9 600			303 600
EE	82 135		1 685			60	1 745	1 113				9 700				83	10 896	3 480	49 480	963		19 669			10 736		84 328
EL	110 670		5 018	1 866	40 439		47 323			760							760	419		721		220					1 360
ES	2 671 639		155 731	279 029	809 036		1 243 796	1 549		n.a.		n.a.	4 023				5 572	11 003	1 052 996	32 659		3 095	1 047	3 143	1 983		1 105 926
FR	4 456 535		597 857	2 229 031	1 939 928	167 210	4 934 026	n.a.		n.a.		n.a.	n.a.	n.a.	n.a.		n.a.	560 000	n.a.		n.a.	n.a.	n.a.	n.a.	n.a.		560 000
IE	151 555		3 494	1 484	45 757		50 735	n.a.	n.a.	2 340		n.a.	n.a.	n.a.	n.a.		2 340	40 000	25 000	3 830			2 950		450		72 230
IT	4 901 000		669 706	145 812	838 591	1 539	1 655 648			505		152	41 426		218		42 301	831	20	4 067		205 827	87 000		2		297 747
CY	44 322							n.a.	n.a.	2 511		n.a.	n.a.	n.a.	257		2 768	n.a.		n.a.		n.a.	n.a.	n.a.	n.a.		
LV	68 771		99	1	290	303	693	292		n.a.		n.a.	n.a.		n.a.		292	4 331	16 015	6 990		980		44	33 213		61 573
LT	102 117				2 681		2 681			163		78					241	17 937	49 631	1 256		12 859	1		47 323		129 007
LU	52 402		3 088	114		7 528	10 730		658	177		150					985	69	6 219	10					21		6 319
HU	307 325			26	105 535		105 561	1 400	23 126	1 500		n.a.	n.a.		n.a.		26 026	8 800	167 500	3 500		1 000	n.a.		n.a.		180 800
MT	15 669					14 470	14 470												21 150								21 150
NL	1 832 806		121 626	596 620			718 246			n.a.		n.a.	n.a.				n.a.	1 562 521	n.a.			n.a.	n.a.	n.a.	n.a.		1 562 521
AT	467 000		110 000	83	106 000		216 083	n.a.	n.a.	n.a.		n.a.	n.a.	n.a.	n.a.	n.a.	15 000	472 000	n.a.			1 000	n.a.	5 100	n.a.	n.a.	493 100
PL	646 738	48 404			35 216		83 620								6 575		6 575	5 406	234 323	36 543		354	93		2 189		278 908
PT	585 579		68 602	6	53 729		122 337	n.a.	346 077	1 246		n.a.	n.a.		n.a.		347 323	1 644	161 944	1 974		n.a.	n.a.	1 500	n.a.		167 062
SI	118 191		847		10 243		11 090		571	n.a.		300				54	871	525	64 971			888	15		135		66 534
SK	104 487									208							208	1 500	20 862	2 370			n.a.		8 500	25	33 232
FI	625 257		141 798	58 466	103 747		304 011	451	81 498			n.a.			70 002		151 951	2 709	67 423			356		752	18 904		90 144
SE	717 000		58 561	315 680	3 200	156 000	533 441	n.a.	n.a.	n.a.		n.a.	n.a.	n.a.	n.a.			9 000	300 000	n.a.		305 000	1 150	85	n.a.		615 235
UK	2 450 578		99 022	92 978	876 008	3 746 935	4 814 943											2 500	2 614 605				6 000				2 623 105
EU15	26 889 724		4 400 887	3 808 594	5 096 032	5 763 771	19 069 284	5 477	605 627	52 376		302	48 449	0	73 651	711	785 882	93 594	8 032 323	50 261		527 339	152 258	20 285	104 642	268	8 980 702
EU10	1 764 755	48 404	36 631	27	153 965	14 833	253 860	2 805	23 697	4 382		10 078			6 915	54	47 877	229 979	761 932	51 622		46 750	4 109	44	102 096	25	1 196 532
EU25	28 654 479	48 404	4 437 518	3 808 621	5 249 997	5 778 604	19 323 144	8 282	629 324	56 758		10 380	48 449		80 566	765	833 759	323 573	8 794 255	101 883		574 089	156 367	20 329	206 738	293	10 177 234

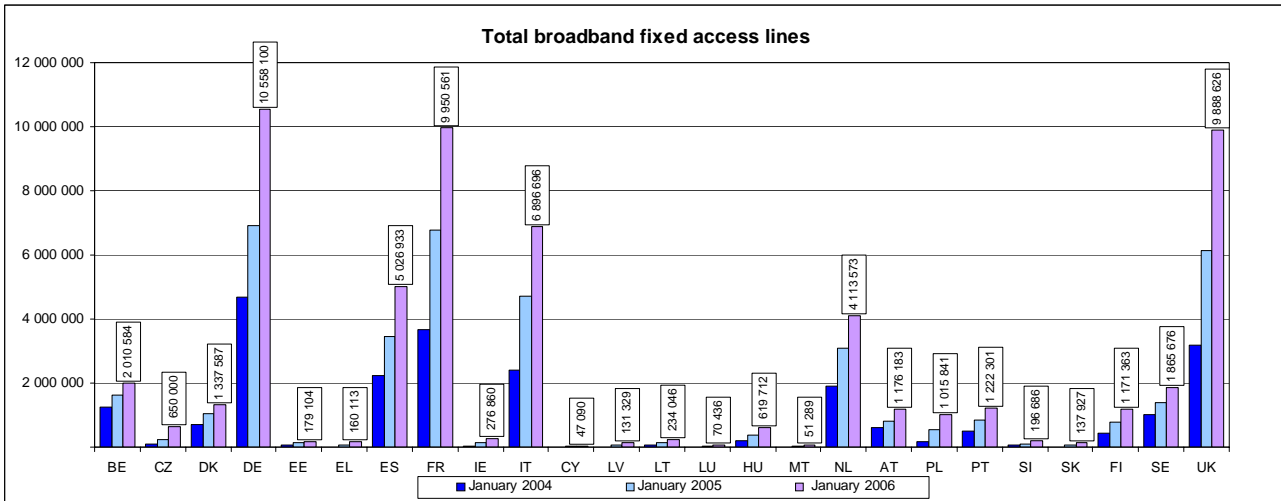
Broadband access in the EU as at 1 January 2006

Total broadband access retail fixed lines in EU25



Total broadband lines		% variation since January 2003	Variation January 05-January 06	
			%	
January 2003	12 807 755			49.38%
July 2003	17 386 784	36%	New lines	19 500 282
October 2003	19 394 275	51%	Lines/day	53 425
January 2004	23 302 070	82%	Variation January 04-January 05	
July 2004	29 871 571	133%	%	69.46%
October 2004	33 438 076	161%	New lines	16 186 263
January 2005	39 488 334	208%	Lines/day	44 346
July 2005	48 350 012	278%	Variation January 03-January 04	
October 2005	52 594 188	311%	%	81.94%
January 2006	58 988 616	361%	New lines	10 494 315
			Lines/day	28 752

Variation lines/day: 20.5%

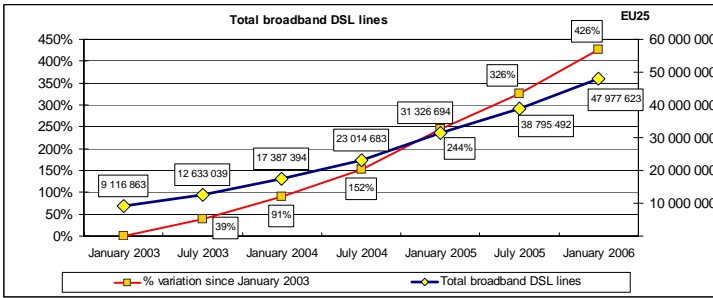


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	1 045 867	1 244 736	1 444 673	1 619 756	1 804 133	2 010 584
CZ		101 000	121 000	228 200	436 000	650 000
DK	606 457	727 906	921 477	1 039 378	1 188 431	1 337 587
DE	3 971 282	4 667 457	5 415 247	6 905 159	8 435 369	10 558 100
EE	58 515	58 515	102 771	138 617	150 246	179 104
EL	2 155	10 483	25 386	51 455	93 583	160 113
ES	1 776 418	2 228 169	2 767 627	3 452 706	4 240 339	5 026 933
FR	2 413 640	3 656 654	4 915 487	6 793 249	8 322 442	9 950 561
IE	9 469	34 050	67 530	138 116	177 121	276 860
IT	1 586 194	2 401 939	3 503 497	4 701 232	5 521 374	6 886 696
CY		10 063	14 520	18 967	18 967	47 090
LV			33 904	56 448	85 381	131 329
LT	42 518	64 982	88 279	129 053	170 619	234 046
LU	10 282	15 942	25 334	37 019	53 049	70 436
HU		187 228	257 016	365 741	457 557	619 712
MT			13 738	38 054	41 551	51 289
NL	1 579 508	1 908 044	2 372 529	3 084 561	3 642 315	4 113 573
AT	527 050	612 600	707 725	827 675	937 830	1 176 183
PL		173 239	219 901	536 738	710 726	1 015 841
PT	369 876	500 437	664 045	854 130	1 054 553	1 222 301
SI		60 398	76 339	118 031	156 669	196 686
SK		8 275	14 485	51 869	80 385	137 927
FI	334 950	447 444	572 100	779 929	974 614	1 171 363
SE	847 100	1 010 400	1 131 400	1 385 100	1 533 647	1 866 676
UK	2 205 503	3 172 109	4 395 561	6 137 151	8 063 111	9 888 626
EU 15	17 285 751	22 638 370	28 929 618	37 806 616	46 041 911	55 725 592
EU10	101 033	663 700	941 953	1 681 718	2 308 101	3 263 024
EU25	17 386 784	23 302 070	29 871 571	39 488 334	48 350 012	58 988 616

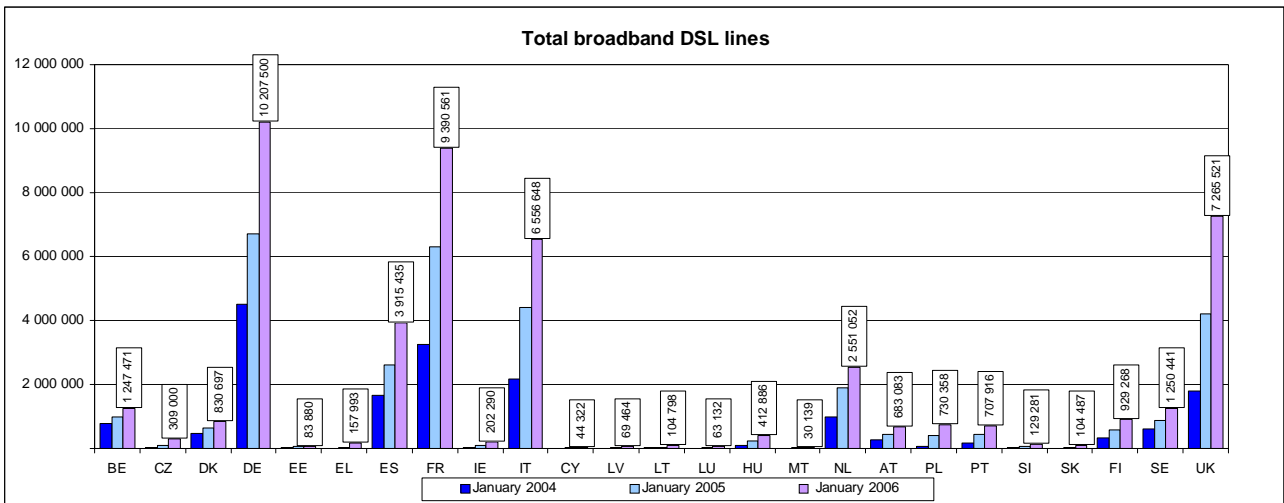
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	January 2004 - January 2005		January 2005 - January 2006			
BE	375 020	30%	1 027	390 828	24%	1 071
CZ	127 200	126%	348	421 800	185%	1 156
DK	311 472	43%	853	298 209	29%	817
DE	2 237 702	48%	6 131	3 652 941	53%	10 008
EE	80 102	137%	219	40 487	29%	111
EL	40 972	391%	112	108 658	211%	298
ES	1 224 537	55%	3 355	1 574 227	46%	4 313
FR	3 136 595	86%	8 593	3 157 312	46%	8 650
IE	104 066	306%	285	138 744	100%	380
IT	2 299 293	96%	6 299	2 195 464	47%	6 015
CY	8 904	88%	24	28 123	148%	77
LV	56 448		155	74 881	133%	205
LT	64 071	99%	176	104 993	81%	288
LU	21 077	132%	58	33 417	90%	92
HU	178 513	95%	489	253 971	69%	696
MT	38 054		104	13 235	35%	36
NL	1 176 517	62%	3 223	1 029 012	33%	2 819
AT	215 075	35%	589	348 508	42%	955
PL	363 498	210%	996	479 103	89%	1 313
PT	353 693	71%	969	368 171	43%	1 009
SI	57 633	95%	158	78 655	67%	215
SK	43 594	527%	119	86 058	166%	236
FI	332 485	74%	911	391 434	50%	1 072
SE	374 700	37%	1 027	480 576	35%	1 317
UK	2 965 042	93%	8 123	3 751 475	61%	10 278
EU 15	15 168 246	67%	41 557	17 918 976	47%	49 093
EU10	1 018 017	153%	2 789	1 581 306	94%	4 332
EU25	16 186 263	69%	44 346	19 500 282	49%	53 425

Broadband access in the EU as at 1 January 2006

Total DSL retail lines in EU25



Total broadband DSL lines		% variation since January 2003	Variation January 05-January 06	
			%	New lines
January 2003	9 116 863		53.15%	16 650 929
July 2003	12 633 039	39%		45 619
October 2003	14 385 871	58%	Variation January 04-January 05	
January 2004	17 387 394	91%	80.17%	13 939 300
July 2004	23 014 683	152%		38 190
October 2004	26 194 876	187%	Variation January 03-January 04	
January 2005	31 326 694	244%	90.72%	8 270 531
July 2005	38 795 492	326%		22 659
October 2005	42 284 347	364%	Variation lines/day: 19.5%	
January 2006	47 977 623	426%		

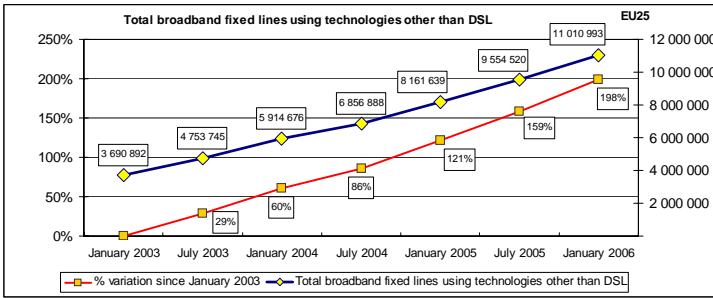


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	627 970	765 183	889 294	996 118	1 113 641	1 247 471
CZ		21 000	36 000	106 000	181 000	309 000
DK	390 692	473 359	562 009	638 961	714 529	830 697
DE	3 884 020	4 498 086	5 286 141	6 709 683	8 138 941	10 207 500
EE	37 558	37 558	50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

	January 2004 - January 2005			January 2005 - January 2006		
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
BE	230 935	30%	633	251 353	25%	689
CZ	85 000	405%	233	203 000	192%	556
DK	165 602	35%	454	191 736	30%	525
DE	2 211 597	49%	6 059	3 497 817	52%	9 583
EE	27 070	72%	74	19 252	30%	53
EL	37 959	442%	104	111 446	239%	305
ES	927 601	55%	2 541	1 311 368	50%	3 593
FR	3 030 449	93%	8 303	3 097 312	49%	8 486
IE	91 183	374%	250	86 707	75%	238
IT	2 244 127	104%	6 148	2 154 063	49%	5 902
CY	7 961	79%	22	26 328	146%	72
LV	39 281		108	30 183	77%	83
LT	24 250	92%	66	54 110	107%	148
LU	18 747	135%	51	30 525	94%	84
HU	122 441	104%	335	173 076	72%	474
MT	22 145		61	7 994	36%	22
NL	906 517	93%	2 484	666 491	35%	1 826
AT	162 475	58%	445	241 008	55%	660
PL	329 947	411%	904	320 172	78%	877
PT	239 309	129%	656	283 747	67%	777
SI	36 592	95%	100	54 359	73%	149
SK	34 124	811%	93	66 153	173%	181
FI	256 946	78%	704	343 618	59%	941
SE	288 000	48%	789	367 241	42%	1 006
UK	2 399 042	133%	6 573	3 061 870	73%	8 389
EU 15	13 210 489	77%	36 193	15 696 302	52%	43 004
EU10	728 811	217%	1 997	954 627	90%	2 615
EU25	13 939 300	80%	38 190	16 650 929	53%	45 619

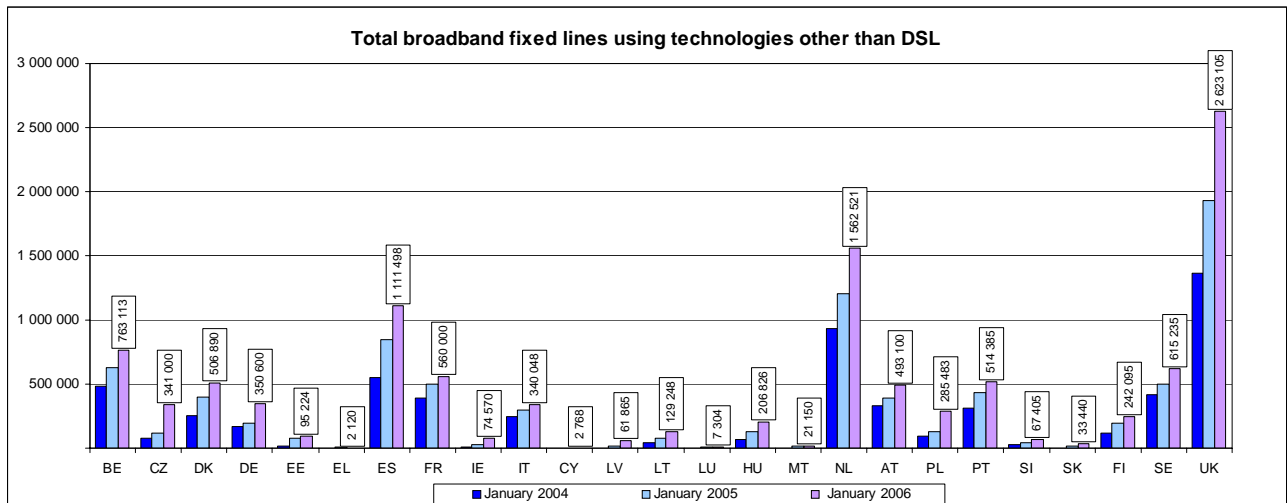
Broadband access in the EU as at 1 January 2006

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 January 05 - January 06	
		%	Lines/day
January 2003		34.91%	2 849 354
July 2003	29%		7 806
October 2003	36%		
January 2004	60%	37.99%	
July 2004	86%		2 246 963
October 2004	96%		6 156
January 2005	121%		
July 2005	159%	60.25%	
October 2005	179%		2 223 784
January 2006	198%		6 093

Variation lines/day: 26.8%

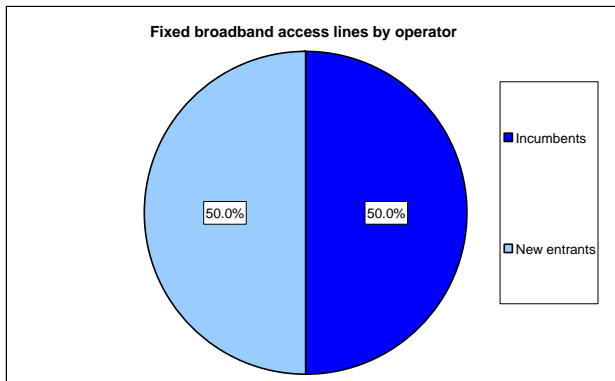


	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	417 897	479 553	555 379	623 638	690 492	763 113
CZ		80 000	85 000	122 200	255 000	341 000
DK	215 765	254 547	359 468	400 417	473 902	506 890
DE	87 262	169 371	129 106	195 476	296 428	350 600
EE	20 957	20 957	51 865	73 989	75 113	95 224
EL	1 796	1 895	2 449	4 908	1 714	2 120
ES	478 855	551 703	681 455	848 639	971 737	1 111 498
FR	313 707	393 854	425 000	500 000	520 000	560 000
IE	4 100	9 650	10 085	22 533	32 745	74 570
IT	198 536	243 481	280 309	298 647	346 104	340 048
CY		30	30	973	973	2 768
LV			7 089	17 167	35 916	61 865
LT	27 074	38 544	54 205	78 365	100 815	129 248
LU	1 322	2 082	3 206	4 412	6 001	7 304
HU		69 959	91 036	125 931	160 320	206 826
MT			2 312	15 909	17 752	21 150
NL	900 000	930 000	998 400	1 200 000	1 438 248	1 562 521
AT	302 400	333 000	352 000	385 600	412 600	493 100
PL		93 000	111 000	126 551	178 442	285 483
PT	262 339	315 577	370 610	429 961	478 295	514 385
SI		22 068	22 499	43 109	60 737	67 405
SK		4 065	4 585	13 535	15 846	33 440
FI	63 950	118 740	172 100	194 279	211 331	242 095
SE	351 800	415 200	445 200	501 900	494 900	615 235
UK	1 105 985	1 367 500	1 642 500	1 933 500	2 279 109	2 623 105
EU 15	4 705 714	5 586 153	6 427 267	7 543 910	8 653 606	9 766 584
EU10	48 031	328 523	429 621	617 729	900 914	1 244 409
EU25	4 753 745	5 914 676	6 856 888	8 161 639	9 554 520	11 010 993

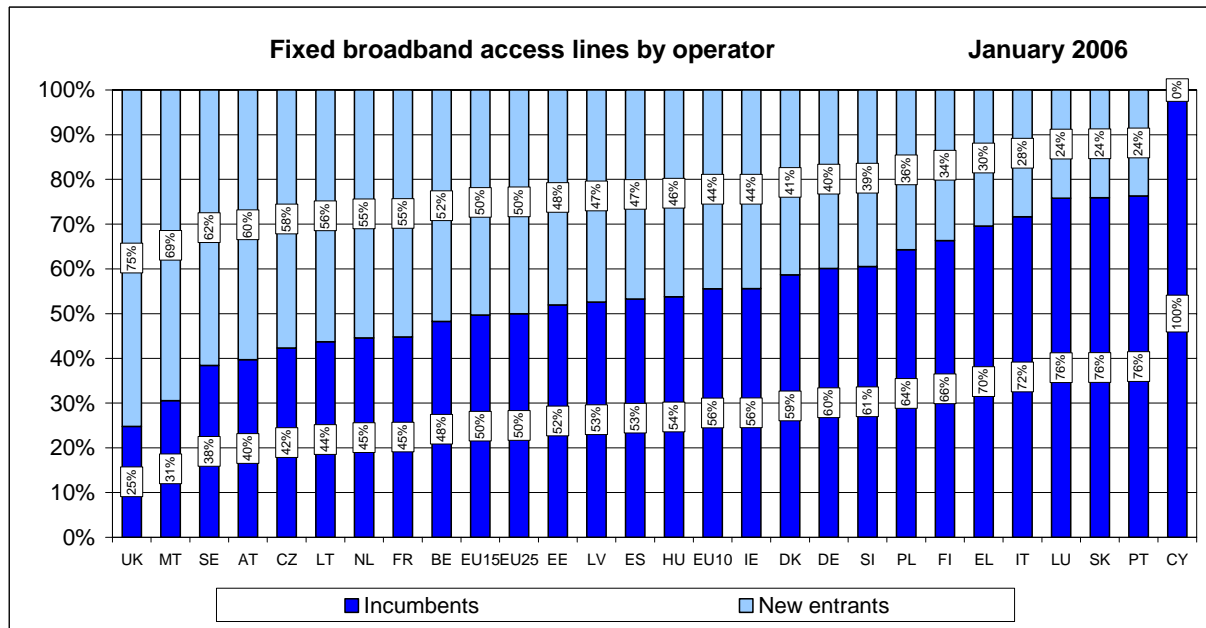
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
BE	144 085	30%	395	139 475	22%	382
CZ	42 200	53%	116	218 800	179%	599
DK	145 870	57%	400	106 473	27%	292
DE	26 105	15%	72	155 124	79%	425
EE	53 032	253%	145	21 235	29%	58
EL	3 013	159%	8	- 2 788	-57%	- 8
ES	296 936	54%	814	262 859	31%	720
FR	106 146	27%	291	60 000	12%	164
IE	12 883	134%	35	52 037	231%	143
IT	55 166	23%	151	41 401	14%	113
CY	943	3143%	3	1 795	184%	5
LV	17 167		47	44 698	260%	122
LT	39 821	103%	109	50 883	65%	139
LU	2 330	112%	6	2 892	66%	8
HU	56 072	80%	154	80 895	64%	222
MT	15 909		44	5 241	33%	14
NL	270 000	29%	740	362 521	30%	993
AT	52 600	16%	144	107 500	28%	295
PL	33 551	36%	92	158 932	126%	435
PT	114 384	36%	313	84 424	20%	231
SI	21 041	95%	58	24 296	56%	67
SK	9 470	233%	26	19 905	147%	55
FI	75 539	64%	207	47 816	25%	131
SE	86 700	21%	238	113 335	23%	311
UK	566 000	41%	1 551	689 605	36%	1 889
EU 15	1 957 757	35%	5 364	2 222 674	29%	6 090
EU10	289 206	88%	792	626 680	101%	1 717
EU25	2 246 963	38%	6 156	2 849 354	35%	7 806

Broadband access in the EU as at 1 January 2006

Fixed broadband access lines by operator in EU25



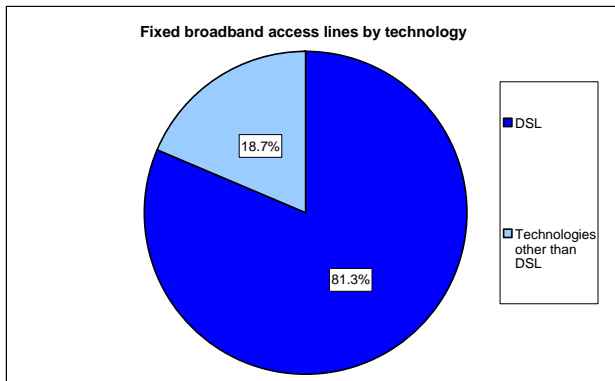
Fixed broadband access lines by operator		
	Incumbents	New entrants
January 2006	50%	50%



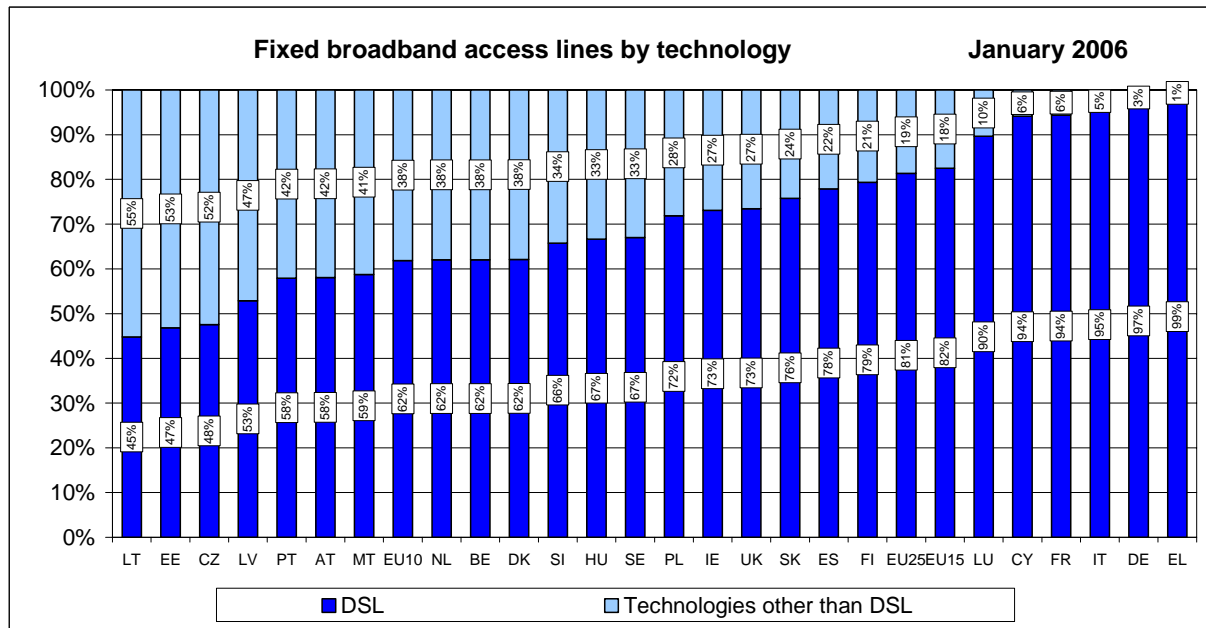
	Incumbents	New entrants
BE	48%	52%
CZ	42%	58%
DK	59%	41%
DE	60%	40%
EE	52%	48%
EL	70%	30%
ES	53%	47%
FR	45%	55%
IE	56%	44%
IT	72%	28%
CY	100%	0%
LV	53%	47%
LT	44%	56%
LU	76%	24%
HU	54%	46%
MT	31%	69%
NL	45%	55%
AT	40%	60%
PL	64%	36%
PT	76%	24%
SI	61%	39%
SK	76%	24%
FI	66%	34%
SE	38%	62%
UK	25%	75%
EU15	50%	50%
EU10	56%	44%
EU25	50%	50%

Broadband access in the EU as at 1 January 2006

Fixed broadband access lines by technology in EU25



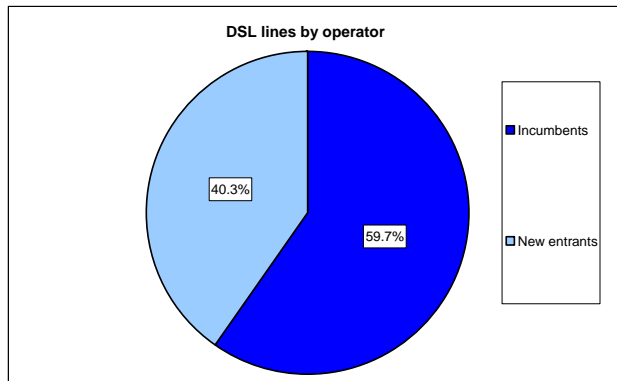
Fixed broadband access lines by technology		
	DSL	Technologies other than DSL
January 2006	81.3%	18.7%



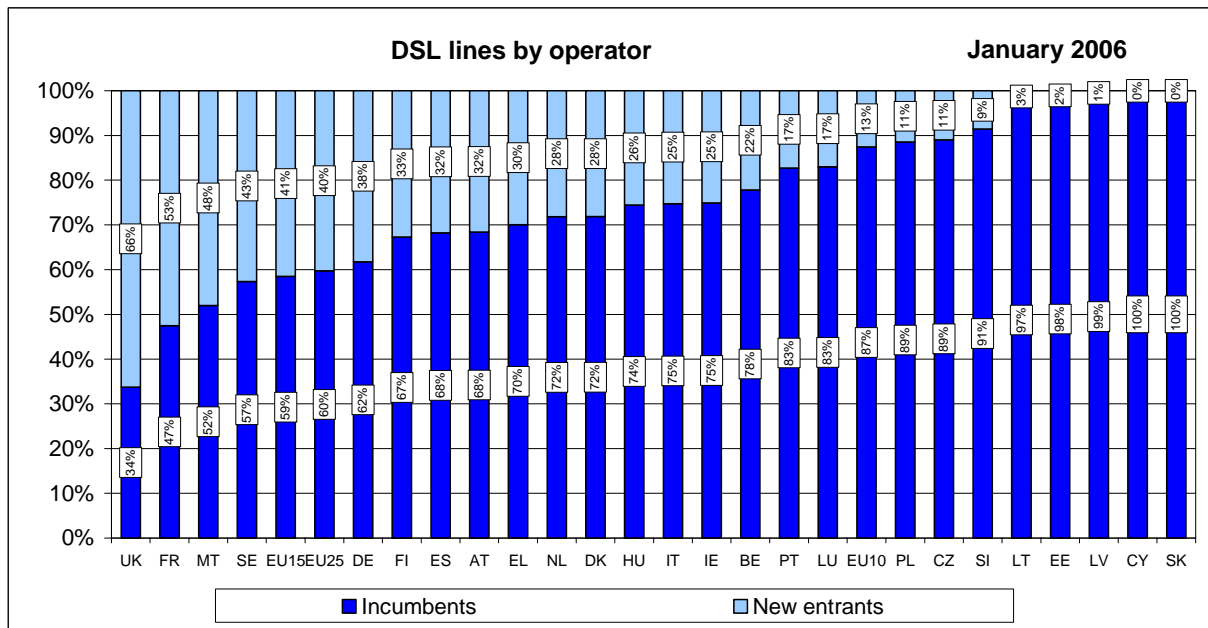
	DSL	Technologies other than DSL
BE	62%	38%
CZ	48%	52%
DK	62%	38%
DE	97%	3%
EE	47%	53%
EL	99%	1%
ES	78%	22%
FR	94%	6%
IE	73%	27%
IT	95%	5%
CY	94%	6%
LV	53%	47%
LT	45%	55%
LU	90%	10%
HU	67%	33%
MT	59%	41%
NL	62%	38%
AT	58%	42%
PL	72%	28%
PT	58%	42%
SI	66%	34%
SK	76%	24%
FI	79%	21%
SE	67%	33%
UK	73%	27%
EU15	82%	18%
EU10	62%	38%
EU25	81%	19%

Broadband access in the EU as at 1 January 2006

DSL access lines by operator in EU25



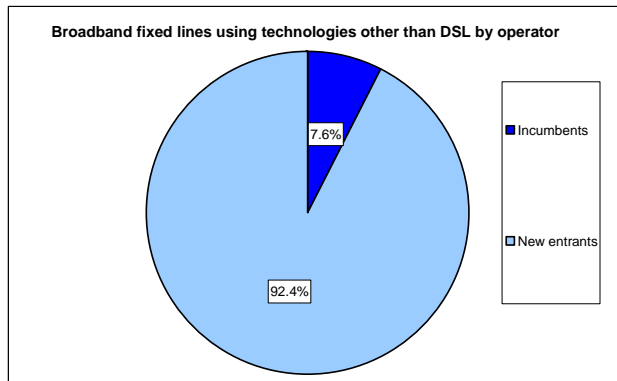
	DSL lines by operator	
	Incumbents	New entrants
January 2006	59.7%	40.3%



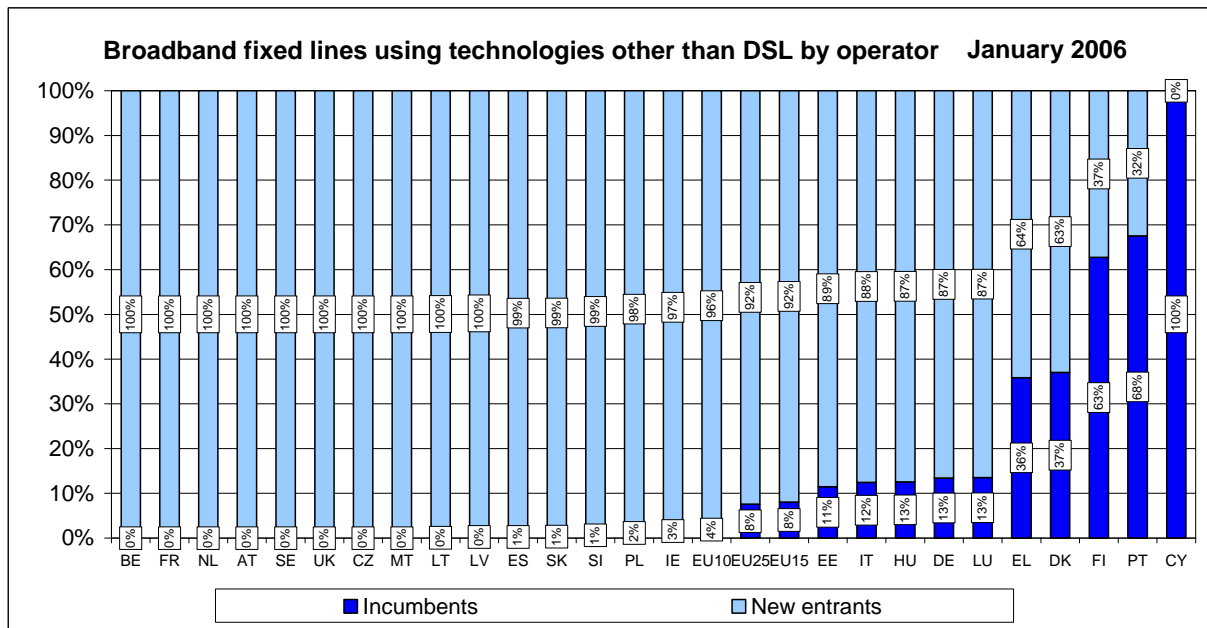
	Incumbents	New entrants
BE	78%	22%
CZ	89%	11%
DK	72%	28%
DE	62%	38%
EE	98%	2%
EL	70%	30%
ES	68%	32%
FR	47%	53%
IE	75%	25%
IT	75%	25%
CY	100%	0%
LV	99%	1%
LT	97%	3%
LU	83%	17%
HU	74%	26%
MT	52%	48%
NL	72%	28%
AT	68%	32%
PL	89%	11%
PT	83%	17%
SI	91%	9%
SK	100%	0%
FI	67%	33%
SE	57%	43%
UK	34%	66%
EU15	59%	41%
EU10	87%	13%
EU25	60%	40%

Broadband access in the EU as at 1 January 2006

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



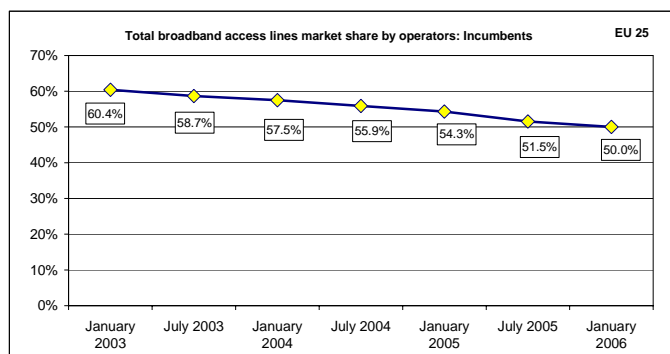
	Broadband fixed lines using technologies other than DSL by operator	
	Incumbents	New entrants
January 2006	7.6%	92.4%



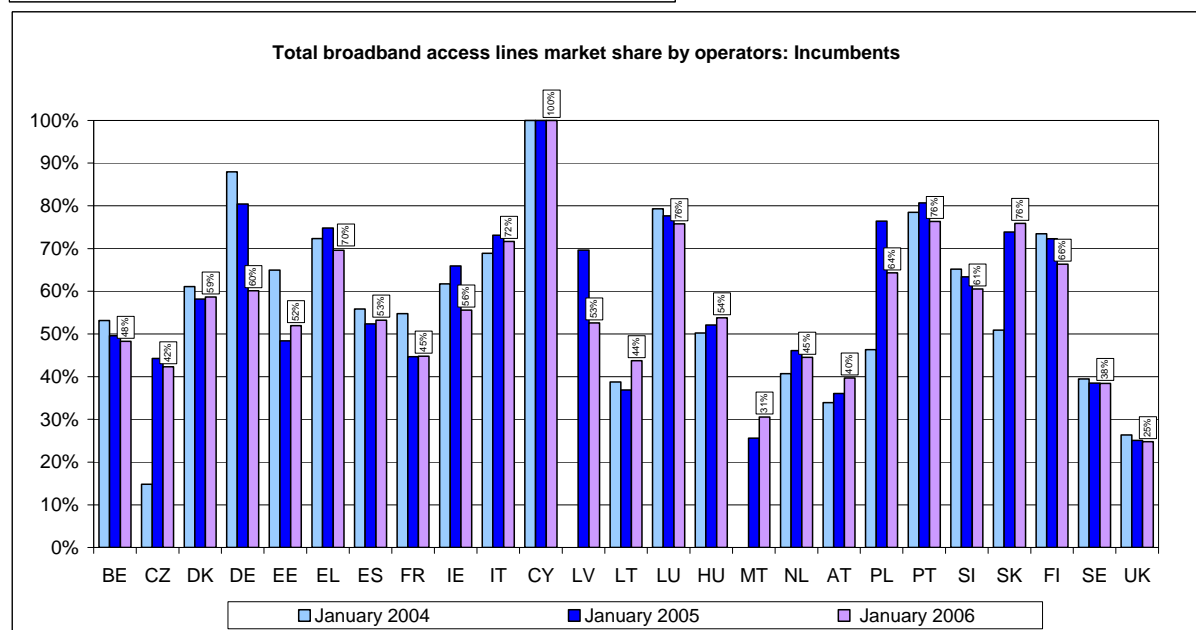
	Incumbents	New entrants
BE	0%	100%
CZ	0%	100%
DK	37%	63%
DE	13%	87%
EE	11%	89%
EL	36%	64%
ES	1%	99%
FR	0%	100%
IE	3%	97%
IT	12%	88%
CY	100%	0%
LV	0%	100%
LT	0%	100%
LU	13%	87%
HU	13%	87%
MT	0%	100%
NL	0%	100%
AT	0%	100%
PL	2%	98%
PT	68%	32%
SI	1%	99%
SK	1%	99%
FI	63%	37%
SE	0%	100%
UK	0%	100%
EU15	8%	92%
EU10	4%	96%
EU25	8%	92%

Broadband access in the EU as at 1 January 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)	
	January 2003	January 2006
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%

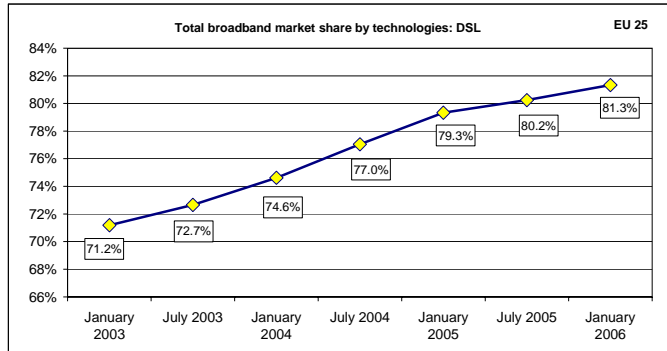


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	48.7%	50.5%	51.1%	53.2%	50.7%	49.6%	48.8%	48.3%
CZ				14.9%	24.8%	44.3%	34.9%	42.3%
DK	61.6%	63.7%	62.0%	61.1%	58.5%	58.2%	55.4%	58.7%
DE	93.9%	92.6%	90.8%	88.0%	86.9%	80.4%	71.6%	60.1%
EE				65.0%	50.5%	48.4%	51.1%	51.9%
EL		17.8%	17.9%	72.3%	79.7%	74.8%	74.5%	69.6%
ES	61.4%	56.3%	55.5%	55.8%	55.5%	52.3%	51.5%	53.3%
FR	72.0%	62.7%	57.5%	54.8%	48.0%	44.7%	44.0%	44.8%
IE	72.8%	35.8%	44.9%	61.7%	70.0%	65.9%	63.0%	55.6%
IT	76.5%	64.5%	66.7%	68.9%	70.7%	73.1%	70.8%	71.7%
CY				100.0%	100.0%	100.0%	100.0%	100.0%
LV					80.9%	69.6%	57.5%	52.6%
LT				38.8%	36.2%	36.9%	39.4%	43.7%
LU		90.5%	83.7%	79.3%	73.5%	77.7%	78.0%	75.8%
HU				50.2%	51.3%	52.1%	51.9%	53.8%
MT					32.8%	25.6%	24.7%	30.6%
NL	19.3%	29.9%	36.1%	40.7%	44.4%	46.1%	44.5%	44.6%
AT	30.4%	31.7%	33.1%	33.9%	35.2%	36.1%	37.2%	39.7%
PL				46.3%	49.5%	76.4%	74.9%	64.3%
PT	66.5%	70.7%	75.2%	78.5%	79.9%	80.7%	79.1%	76.3%
SI				65.2%	71.0%	63.3%	61.0%	60.5%
SK				50.9%	68.3%	73.9%	80.5%	75.9%
FI	72.9%	74.0%	69.9%	73.5%	72.0%	72.3%	66.8%	66.4%
SE	54.7%	52.7%	43.1%	39.5%	38.8%	38.5%	39.1%	38.4%
UK	25.5%	22.6%	25.6%	26.4%	25.4%	25.1%	24.8%	24.8%
EU15	62.6%	60.4%	58.7%	57.8%	56.1%	54.1%	51.3%	49.7%
EU10				46.1%	49.4%	59.3%	56.5%	55.6%
EU25	62.6%	60.4%	58.7%	57.5%	55.9%	54.3%	51.5%	50.0%

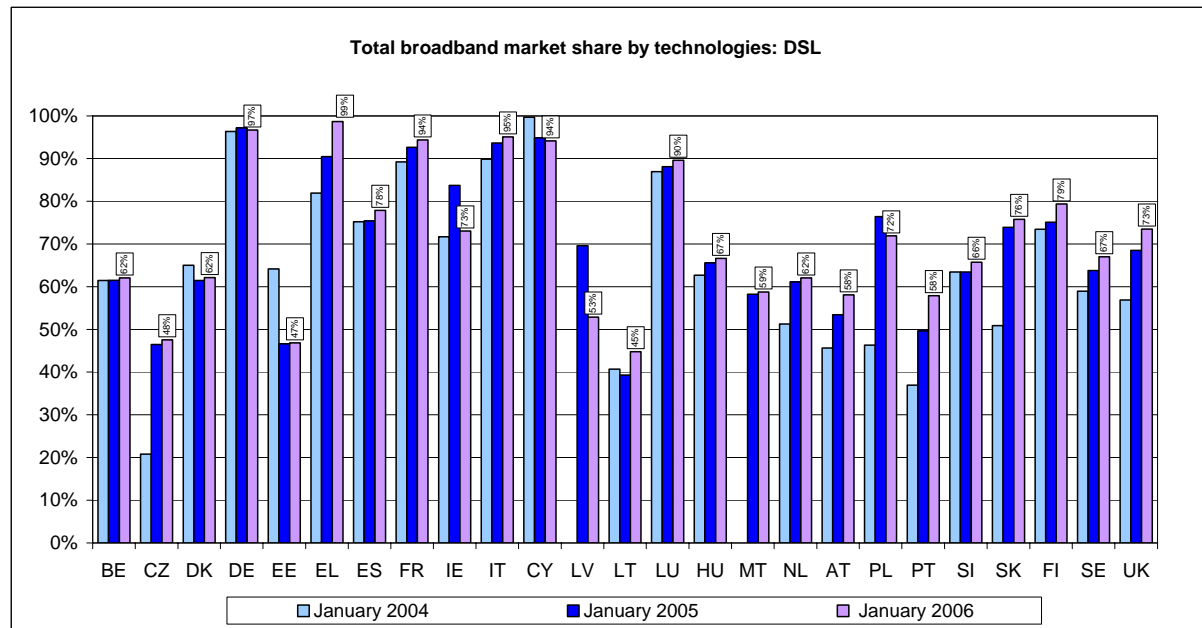
	Variation	
	January 06-05	January 05-04
BE	-1.3%	-3.5%
CZ	-2.0%	29.4%
DK	0.5%	-2.9%
DE	-20.3%	-7.5%
EE	3.6%	-16.6%
EL	-5.2%	2.5%
ES	0.9%	-3.5%
FR	0.1%	-10.1%
IE	-10.4%	4.2%
IT	-1.4%	4.3%
CY		
LV	-17.0%	
LT	6.8%	-1.9%
LU	-1.9%	-1.7%
HU	1.7%	1.8%
MT	4.9%	
NL	-1.6%	5.4%
AT	3.7%	2.1%
PL	-12.1%	30.1%
PT	-4.4%	2.2%
SI	-2.8%	-1.9%
SK	2.0%	23.0%
FI	-5.9%	-1.2%
SE	0.0%	-1.0%
UK	-0.3%	-1.3%
EU15	-4.4%	-3.8%
EU10	-3.8%	13.2%
EU25	-4.3%	-3.2%

Broadband access in the EU as at 1 January 2006

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



Period	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%

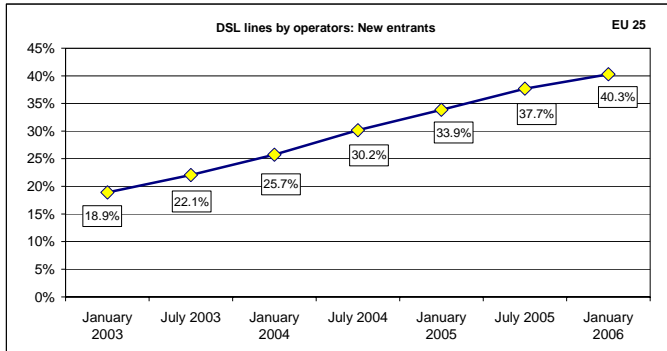


Country	Market Share (%)							
	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	58.0%	59.7%	60.0%	61.5%	61.6%	61.5%	61.7%	62.0%
CZ				20.8%	29.8%	46.5%	41.5%	47.5%
DK	62.7%	66.8%	64.4%	65.0%	61.0%	61.5%	60.1%	62.1%
DE	98.4%	98.2%	97.8%	96.4%	97.6%	97.2%	96.5%	96.7%
EE				64.2%	49.5%	46.6%	50.0%	46.8%
EL	20.2%	5.0%	16.7%	81.9%	90.4%	90.5%	98.2%	98.7%
ES	79.0%	73.4%	73.0%	75.2%	75.4%	75.4%	77.1%	77.9%
FR	71.5%	84.9%	87.0%	89.2%	91.4%	92.6%	93.8%	94.4%
IE	73.7%	44.5%	56.7%	71.7%	85.1%	83.7%	81.5%	73.1%
IT	88.8%	85.6%	87.5%	89.9%	92.0%	93.6%	93.7%	95.1%
CY				99.7%	99.8%	94.9%	94.9%	94.1%
LV					79.1%	69.6%	57.9%	52.9%
LT				40.7%	38.6%	39.3%	40.9%	44.8%
LU		92.0%	87.1%	86.9%	87.3%	88.1%	88.7%	89.6%
HU				62.7%	64.6%	65.6%	65.0%	66.6%
MT					83.2%	58.2%	57.3%	58.8%
NL	21.3%	34.1%	43.0%	51.3%	57.9%	61.1%	60.5%	62.0%
AT	37.0%	39.8%	42.6%	45.6%	50.3%	53.4%	56.0%	58.1%
PL				46.3%	49.5%	76.4%	74.9%	71.9%
PT	3.7%	20.3%	29.1%	36.9%	44.2%	49.7%	54.6%	57.9%
SI				63.5%	70.5%	63.5%	61.2%	65.7%
SK				50.9%	68.3%	73.9%	80.3%	75.8%
FI	73.7%	79.8%	80.9%	73.5%	69.9%	75.1%	78.3%	79.3%
SE	60.7%	59.1%	58.5%	58.9%	60.7%	63.8%	67.7%	67.0%
UK	41.0%	44.3%	49.9%	56.9%	62.6%	68.5%	71.7%	73.5%
EU15	68.2%	71.2%	72.8%	75.3%	77.8%	80.0%	81.2%	82.5%
EU10				50.5%	54.4%	63.3%	61.0%	61.9%
EU25	68.2%	71.2%	72.7%	74.6%	77.0%	79.3%	80.2%	81.3%

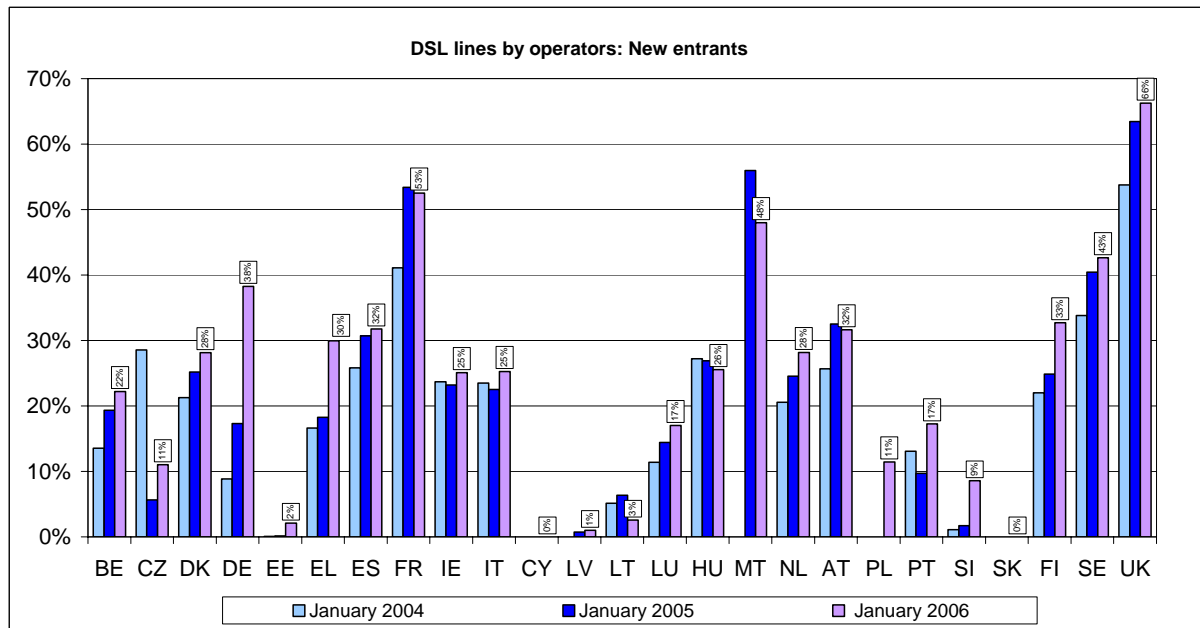
Country	Variation	
	January 06-05	January 05-04
BE	0.5%	0.0%
CZ	1.1%	25.7%
DK	0.6%	-3.6%
DE	-0.5%	0.8%
EE	0.2%	-17.6%
EL	8.2%	8.5%
ES	2.5%	0.2%
FR	1.7%	3.4%
IE	-10.6%	12.0%
IT	1.4%	3.8%
CY	-0.7%	-4.8%
LV	-16.7%	
LT	5.5%	-1.4%
LU	1.5%	1.1%
HU	1.1%	2.9%
MT	0.6%	
NL	0.9%	9.8%
AT	4.7%	7.8%
PL	-4.5%	30.1%
PT	8.3%	12.7%
SI	2.3%	0.0%
SK	1.8%	23.0%
FI	4.2%	1.6%
SE	3.3%	4.9%
UK	5.0%	11.6%
EU15	2.4%	4.7%
EU10	-1.4%	12.8%
EU25	2.0%	4.7%

Broadband access in the EU as at 1 January 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%

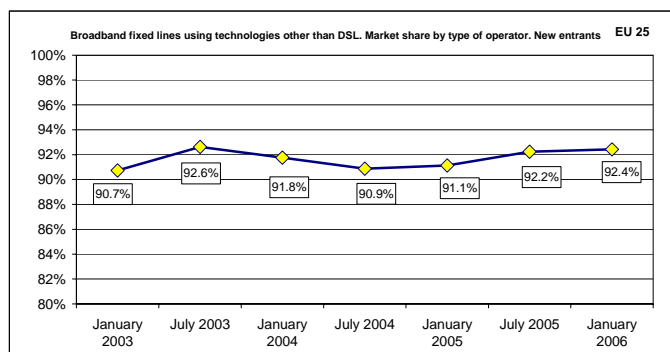


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	16.2%	15.5%	15.0%	13.5%	17.7%	19.3%	20.9%	22.2%
CZ				28.6%	16.7%	5.7%	16.6%	11.0%
DK	20.5%	18.9%	17.7%	21.3%	24.0%	25.2%	27.3%	28.1%
DE	4.6%	5.8%	7.3%	8.9%	11.1%	17.3%	26.3%	38.3%
EE				0.1%	0.2%	0.1%	3.9%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

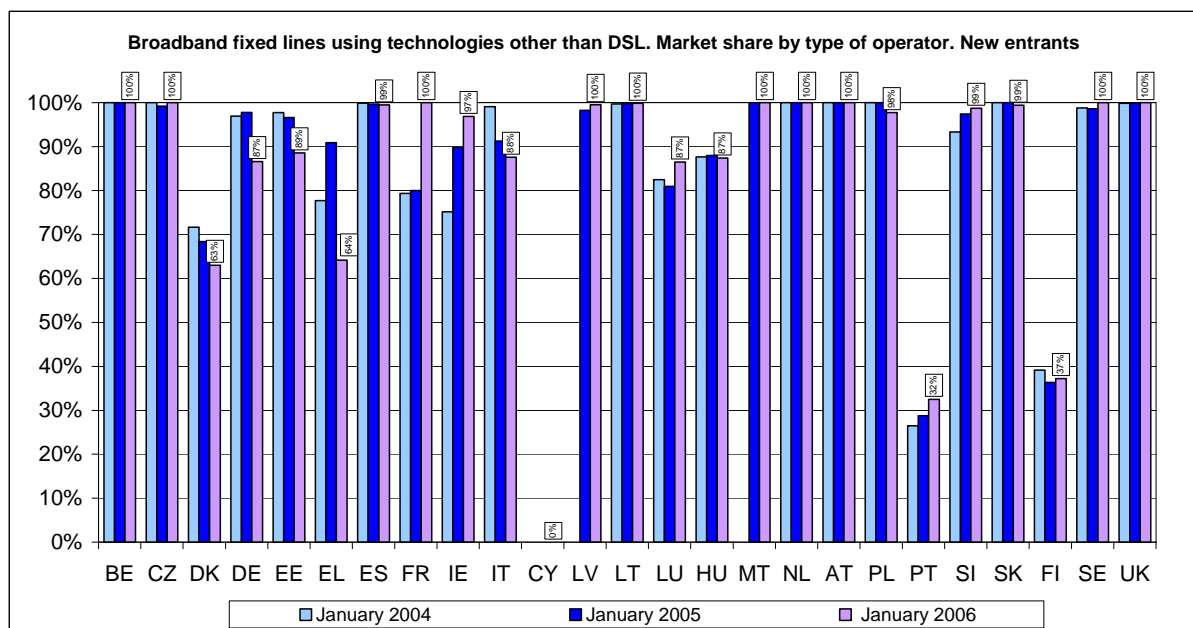
	Variation	
	January 06-05	January 05-04
BE	2.9%	5.8%
CZ	5.3%	-22.9%
DK	3.0%	3.9%
DE	21.0%	8.4%
EE	1.9%	0.1%
EL	11.7%	1.6%
ES	1.0%	4.9%
FR	-0.8%	12.3%
IE	1.9%	-0.5%
IT	2.7%	-1.0%
CY		
LV	0.3%	
LT	-3.8%	1.2%
LU	2.6%	3.0%
HU	-1.3%	-0.3%
MT	-8.0%	
NL	3.6%	4.0%
AT	-0.9%	6.8%
PL	11.4%	
PT	7.6%	-3.4%
SI	6.9%	0.6%
SK		
FI	7.8%	2.9%
SE	2.2%	6.6%
UK	2.8%	9.7%
EU15	6.7%	8.8%
EU10	4.3%	-3.6%
EU25	6.4%	8.1%

Broadband access in the EU as at 1 January 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)	
	January 2003	January 2006
January 2003	90.7%	
July 2003	92.6%	1.9%
January 2004	91.8%	1.0%
July 2004	90.9%	0.1%
January 2005	91.1%	0.4%
July 2005	92.2%	1.5%
January 2006	92.4%	1.7%

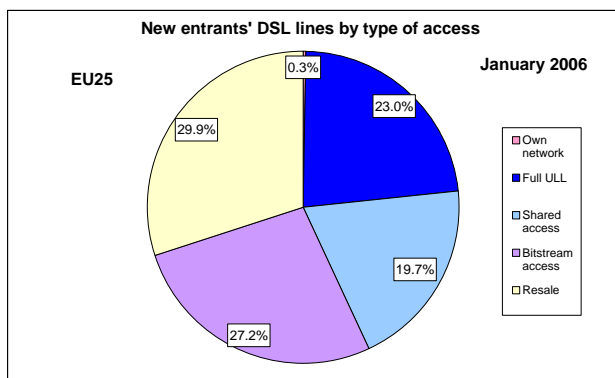


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005	July 2005	January 2006
BE	99.7%	99.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
CZ	100.0%	100.0%	100.0%	100.0%	100.0%	99.2%	99.6%	100.0%
DK	68.3%	71.3%	74.8%	71.6%	68.8%	68.4%	70.7%	63.0%
DE	100.0%	91.2%	94.0%	96.9%	96.2%	97.8%	85.2%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

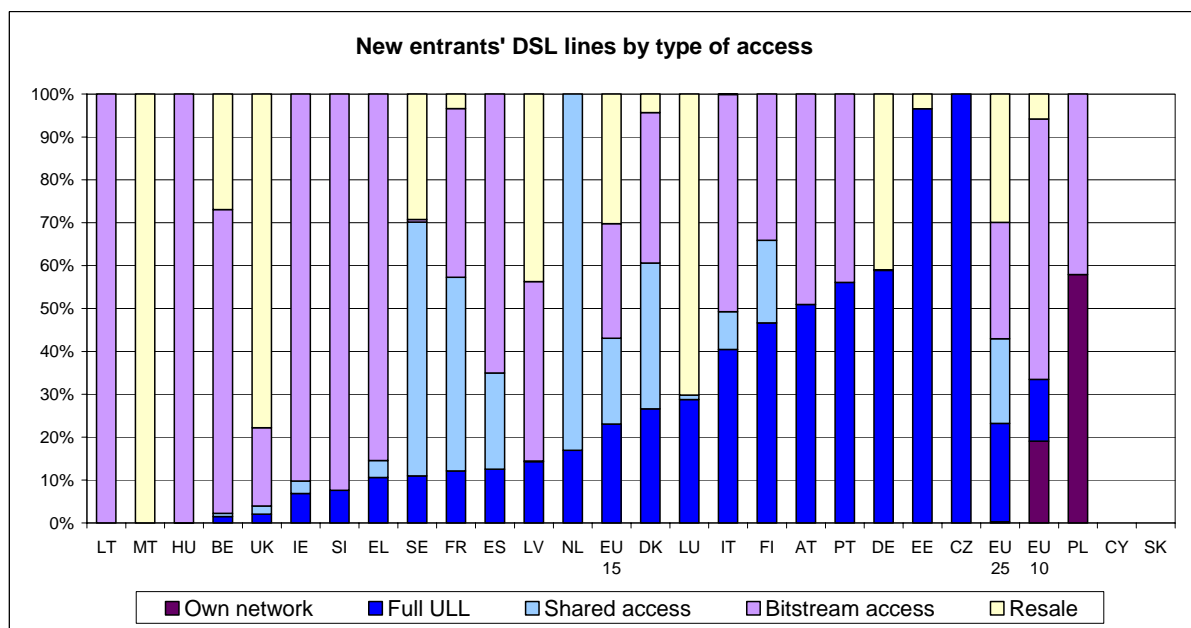
	Variation	
	January 06-05	January 05-04
BE	0.0%	0.0%
CZ	0.8%	-0.8%
DK	-5.4%	-3.3%
DE	-11.2%	0.8%
EE	-8.0%	-1.1%
EL	-26.7%	13.2%
ES	-0.2%	-0.2%
FR	20.0%	0.7%
IE	7.1%	14.6%
IT	-3.7%	-7.8%
CY		
LV	1.3%	
LT	0.0%	0.1%
LU	5.6%	-1.5%
HU	-0.6%	0.3%
MT		
NL		
AT		
PL	-2.3%	
PT	3.7%	2.3%
SI	1.3%	4.1%
SK	-0.6%	
FI	0.9%	-2.8%
SE	1.4%	-0.2%
UK	0.1%	0.1%
EU15	1.3%	-0.8%
EU10	-0.4%	-0.2%
EU25	1.3%	-0.6%

Broadband access in the EU as at 1 January 2006

New entrants DSL lines by access type in EU 25



January 2006	
Own network	0.3%
Full ULL	23%
Shared access	19.7%
Bitstream access	27.2%
Resale	29.9%
Total LLU	42.7%



	Own network	Full ULL	Shared access	Bitstream access	Resale
BE	0.0%	1.5%	0.7%	70.9%	26.9%
CZ	0.0%	100.0%	0.0%	0.0%	0.0%
DK	0.0%	26.6%	34.0%	35.1%	4.3%
DE	0.0%	58.9%	0.2%	0.0%	40.9%
EE	0.0%	96.6%	0.0%	0.0%	3.4%
EL	0.0%	10.6%	3.9%	85.5%	0.0%
ES	0.0%	12.5%	22.4%	65.0%	0.0%
FR	0.0%	12.1%	45.2%	39.3%	3.4%
IE	0.0%	6.9%	2.9%	90.2%	0.0%
IT	0.0%	40.4%	8.8%	50.7%	0.1%
CY					
LV	0.0%	14.3%	0.1%	41.8%	43.7%
LT	0.0%	0.0%	0.0%	100.0%	0.0%
LU	0.0%	28.8%	1.1%	0.0%	70.2%
HU	0.0%	0.0%	0.0%	100.0%	0.0%
MT	0.0%	0.0%	0.0%	0.0%	100.0%
NL	0.0%	16.9%	83.1%	0.0%	0.0%
AT	0.0%	50.9%	0.0%	49.1%	0.0%
PL	57.9%	0.0%	0.0%	42.1%	0.0%
PT	0.0%	56.1%	0.0%	43.9%	0.0%
SI	0.0%	7.6%	0.0%	92.4%	0.0%
SK					
FI	0.0%	46.6%	19.2%	34.1%	0.0%
SE	0.0%	11.0%	59.2%	0.6%	29.2%
UK	0.0%	2.1%	1.9%	18.2%	77.8%
EU15	0.0%	23.1%	20.0%	26.7%	30.2%
EU10	19.1%	14.4%	0.0%	60.6%	5.8%
EU25	0.3%	23.0%	19.7%	27.2%	29.9%

Data on national population used in this report

	2002	2003	2004	2005
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