

ECTA Broadband scorecard end of March 09

Incumbent connections					
	total broadband connections retailed by incumbent or its ISP	of which lines offering VoB	of which lines offering TV	of which >2Mbit/s	of which >10Mbit/s
Austria	840,127				689
Belgium	1,389,053				
Bulgaria	247,751				
Cyprus	108,938		26,819	35,641	
Czech Rep.	592,539				
Denmark	1,134,342		334,304	1,047,383	173,797
Estonia	169,127		84,880	130,336	73,208
Finland	915,800	45,000		726,300	112,300
France	8,561,600	6,100,000	2,200,000		
Germany	11,000,000		450,000		
Greece	864,021				
Hungary	704,089				
Ireland	470,907			291,025	6,946
Italy	6,843,588	1,789,306	204,000	2,913,000	433,000
Latvia	183,316			102,122	28
Lithuania	278,419	1,729	45,215	114,152	17,703
Luxembourg	98,350				
Malta	43,638			43,638	3,875
Netherlands	3,034,000				
Poland	2,110,769			205,547	11,440
Portugal	753,586	233,427	233,427	636,160	357,132
Romania	655,218	91	17	5,478	258
Slovakia	356,322		38,579	350,420	4,325
Slovenia	212,362	124,472	97,607	47,497	21,423
Spain	5,195,477	14,820	604,819	4,204,259	17,925
Sweden	1,135,000	59,000	312,000	932,000	229,000
UK	4,756,565			3,881,203	
Turkey	6,000,174	0	0	600,018	0

 **No update available**

 There is an **update available but not directly comparable with the rest of the Sc**

	Competitive Cable connections				
of which >20Mbit/s	total connections (all services) retailed by competitive cable operators	of which lines offering VoB	of which lines offering TV	of which lines offering broadband	of which >2Mbit/s
	565,068			565,068	
	1,132,075			1,132,075	
	1,218,652		1,218,652	103,048	99,821
	4,358	2,079	2,279	4,358	295
	382,512			382,512	
56,631	1,094,000		1,094,000	232,339	211,984
143	220,084	65,023	220,084	73,845	43,770
	106,200			106,200	
	950,000			950,000	
	18,250,000	2,000,000	18,250,000	2,000,000	
	0			0	
	676,186			676,186	
	112,966		112,966	112,966	112,001
	0			0	
	37,217			37,217	12,393
	402,271	1,096	402,271	64,920	16,361
				16,259	
118	196,169	53,151	90,147	52,871	46,634
	5,950,000		5,950,000	2,211,000	
0	3,945,494		3,945,494	1,248,984	1,216,497
165,931	1,459,192	400,953	1,459,192	688,765	629,711
0	4,763,942		3,493,829	1,735,565	
488	807,556		738,556	69,000	55,214
	285,758	47,747	285,758	97,484	41,123
373	3,163,731		1,269,121	1,807,160	1,399,011
	2,500,000	320,000	2,500,000	586,000	434,000
	3,737,617			3,737,617	1,336,987
0	1,220,775	0	1,220,775	80,211	150

Record- because of data collection timing differing from the ECTA's collection exercise. Please see

		Competitive xDSL and FTTH connections				
of which >10Mbit/s	of which >20Mbit/s	total broadband connections retailed by competitive xDSL and FTTH/B operators	of which lines offering VoB	of which lines offering TV	of which >2Mbit/s	of which >10Mbit/s
204,763		339,955				
		380,362				
72,763	17,318	14,413			8,439	5,380
		24,316				
		195,360				
19,389	2,052	509,701			453,983	124,857
29,235	840	36,403			36,403	29,845
		433,000			130,600	28,000
	130,000	8,755,400				
		9,000,000				
		740,537				
		217,248				
42,154		214,156			94,820	1,526
		5,019,000				
202		6,737			5,817	1,886
1,079		162,839	1,744	955	140,542	94,346
		70				
6,007	938	3,986				
		817,000				
367,687	0	698,085			168,308	3,977
195,658	48,100	288,416		11,790	224,460	166,904
		88,198			929	929
25,655		131,518			94,007	67,206
10,162		129,276	96,227	57,825	76,460	46,552
259,022	4,713	2,146,438	799,402	107,014	1,045,557	693,189
100,000		1,214,000	301,000	28,000	1,145,000	688,000
407,496	3384.1542	9,026,749			5,608,654	0
0	0	298,865	0	0	29,887	0

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	Competitive fixed wireless connections					
of which >20Mbit/s	total broadband connections retailed by competitive Broadband fixed wireless operators	of which lines offering VoB	of which lines offering TV	of which >2Mbit/s	of which >10Mbit/s	of which >20Mbit/s
	37,585				0	
	8,349					
2,379	5,078					
	0					
58,455	20,870			7,721	1,884	77
1,810	35,261			35,261		
	19,555					
	1,087					
	86,000					
	116,461			57,636	293	
	0					
	16,067			6,998	1,717	
	37,132	1,428	0	3,020	917	
	150					
	3,296	3,296		3,296		
0	1,452			416	2	0
86,765	22,604	22,604	22,510	17,496	3,255	3,255
	27,443		782	1,735,565	673	
15,000	84,778			19,903	2,000	200
	1,495	484	631	547	13	
5,565	54,524		0	2,768	0	0
	4,000			2,000	0	
0	30,000					
0	0	0	0	0	0	0

Satellite

satellite TV subscriptions

232,700

10,000

358,000

660,939

578,730

329

0

25,600

0

584,295

2,152,512

380,000

105,000

2,001,295

359,000

8,918,000

2,841,500

	<u>Population (Eurostat 2001)</u>	BB lines (Apr 09)	BB lines (Q3 2008)
Austria	8,265,900	1,788,366	1,746,039
Belgium	10,511,400	2,909,839	2,868,092
Bulgaria	7679290	851,827	795,500
Cyprus	766,400	137,633	128,429
Czech Rep.	10,251,100	1,780,311	1,770,184
Denmark	5,427,500	2,016,297	2,035,114
Estonia	1,344,700	331,810	325,002
Finland	5,255,600	1,617,600	1,616,354
France	62,886,200	17,426,000	17,008,000
Germany	82,438,000	24,432,000	22,691,250
Greece	11,125,200	1,610,291	1,411,561
Hungary	10,076,600	1,683,723	1,667,103
Ireland	4,209,000	917,492	856,375
Italy	58,751,700	11,935,588	11,160,248
Latvia	2,294,600	395,473	370,360
Lithuania	3,403,300	606,786	567,663
Luxembourg	459,500	128,994	129,698
Malta	404,300	104,168	97,556
Netherlands	16,334,200	6,062,000	5,935,000
Poland	38,157,100	4,059,290	3,848,377
Portugal	10,569,592	1,809,566	1,719,464
Romania	22,276,506	2,507,773	2,265,154
Slovakia	5,389,200	651,827	569,256
Slovenia	2,003,400	440,662	396,954
Spain	43,758,300	9,199,149	8,807,039
Sweden	9,047,800	3,029,000	2,806,000
UK	60,393,100	17,572,433	16,941,500
EU total/average	493,479,488	116,005,898	110,533,272

BB lines (Q1 2008)	BB penetration Apr 2009	Growth (half year)	Growth (full year)
1,732,758	21.6%	2.4%	3.2%
2,671,826	27.7%	1.5%	8.9%
259583	11.1%	7.1%	228.2%
87,011	18.0%	7.2%	58.2%
631,675	17.4%	0.6%	181.8%
1,977,366	37.1%	-0.9%	2.0%
284,194	24.7%	2.1%	16.8%
1,615,270	30.8%	0.1%	0.1%
16,258,000	27.7%	2.5%	7.2%
21,374,000	29.6%	7.7%	14.3%
1,125,257	14.5%	14.1%	43.1%
1,667,103	16.7%	1.0%	1.0%
805,932	21.8%	7.1%	13.8%
10,686,625	20.3%	6.9%	11.7%
343,227	17.2%	6.8%	15.2%
520,791	17.8%	6.9%	16.5%
120,955	28.1%	-0.5%	6.6%
91,989	25.8%	6.8%	13.2%
5,289,000	37.1%	2.1%	14.6%
3,183,430	10.6%	5.5%	27.5%
1,731,640	17.1%	5.2%	4.5%
957996	11.3%	10.7%	161.8%
486,648	12.1%	14.5%	33.9%
368,309	22.0%	11.0%	19.6%
8,394,418	21.0%	4.5%	9.6%
2,756,000	33.5%	7.9%	9.9%
16,257,750	29.1%	3.7%	8.1%
101,678,753	23.5%	5.0%	14.1%

Lines by technology

	DSL	Cable	Fibre	Other fixed	Total fixed
Austria	1,174,293	565,068	5,789	43,216	1,788,366
Belgium	1,768,804	1,132,075	611	8,349	2,909,839
Bulgaria	256,126	103,048	14,413	478,240	851,827
Cyprus	133,254	4,358	0	21	137,633
Czech Rep.	707,899	382,512	80,000	609,900	1,780,311
Denmark	1,240,153	538,936	87,991	149,217	2,016,297
Estonia	137,761	73,845	67,789	52,415	331,810
Finland	1,240,300	214,700	0	162,600	1,617,600
France	16,436,000	950,000	40,000	0	17,426,000
Germany	22,200,000	2,000,000	0	232,000	24,432,000
Greece	1,604,558	0	0	5,733	1,610,291
Hungary	815,990	779,733	2,000	86,000	1,683,723
Ireland	679,578	112,966	5,485	119,463	917,492
Italy	11,550,000	0	312,588	73,000	11,935,588
Latvia	183,972	37,217	6,637	167,647	395,473
Lithuania	248,286	64,920	193,172	100,408	606,786
Luxembourg	111,501	17,020	333	140	128,994
Malta	47,624	52,871	0	3,673	104,168
Netherlands	3,711,000	2,211,000	140,000	0	6,062,000
Poland	2,798,782	1,248,984	10,072	1,452	4,059,290
Portugal	1,091,800	688,765	3,617	25,384	1,809,566
Romania	656,563	1,736,347	87,000	27,863	2,507,773
Slovakia	376,259	69,000	119,701	86,867	651,827
Slovenia	287,237	97,484	54,385	1,556	440,662
Spain	7,330,128	1,807,160	5,210	56,651	9,199,149
Sweden	1,759,000	586,000	669,000	15,000	3,029,000
UK	13,798,816	3,737,617	0	36,000	17,572,433
EU total/average	92,345,684	19,211,626	1,905,793	2,542,795	116,005,898

Lines by technology % total fixed

DSL	Cable	Fibre	Other fixed
65.7%	31.6%	0.3%	2.4%
60.8%	38.9%	0.0%	0.3%
30.1%	12.1%	1.7%	56.1%
96.8%	3.2%	0.0%	0.0%
39.8%	21.5%	4.5%	34.3%
61.5%	26.7%	4.4%	7.4%
41.5%	22.3%	20.4%	15.8%
76.7%	13.3%	0.0%	10.1%
94.3%	5.5%	0.2%	0.0%
90.9%	8.2%	0.0%	0.9%
99.6%	0.0%	0.0%	0.4%
48.5%	46.3%	0.1%	5.1%
74.1%	12.3%	0.6%	13.0%
96.8%	0.0%	2.6%	0.6%
46.5%	9.4%	1.7%	42.4%
40.9%	10.7%	31.8%	16.5%
86.4%	13.2%	0.3%	0.1%
45.7%	50.8%	0.0%	3.5%
61.2%	36.5%	2.3%	0.0%
68.9%	30.8%	0.2%	0.0%
60.3%	38.1%	0.2%	1.4%
26.2%	69.2%	3.5%	1.1%
57.7%	10.6%	18.4%	13.3%
65.2%	22.1%	12.3%	0.4%
79.7%	19.6%	0.1%	0.6%
58.1%	19.3%	22.1%	0.5%
78.5%	21.3%	0.0%	0.2%
79.6%	16.6%	1.6%	2.2%

Lines by technology penetration

DSL	Cable	Fibre	Other fixed
14.2%	6.8%	0.1%	0.5%
16.8%	10.8%	0.0%	0.1%
3.3%	1.3%	0.2%	6.2%
17.4%	0.6%	0.0%	0.0%
6.9%	3.7%	0.8%	5.9%
22.8%	9.9%	1.6%	2.7%
10.2%	5.5%	5.0%	3.9%
23.6%	4.1%	0.0%	3.1%
26.1%	1.5%	0.1%	0.0%
26.9%	2.4%	0.0%	0.3%
14.4%	0.0%	0.0%	0.1%
8.1%	7.7%	0.0%	0.9%
16.1%	2.7%	0.1%	2.8%
19.7%	0.0%	0.5%	0.1%
8.0%	1.6%	0.3%	7.3%
7.3%	1.9%	5.7%	3.0%
24.3%	3.7%	0.1%	0.0%
11.8%	13.1%	0.0%	0.9%
22.7%	13.5%	0.9%	0.0%
7.3%	3.3%	0.0%	0.0%
10.3%	6.5%	0.0%	0.2%
2.9%	7.8%	0.4%	0.1%
7.0%	1.3%	2.2%	1.6%
14.3%	4.9%	2.7%	0.1%
16.8%	4.1%	0.0%	0.1%
19.4%	6.5%	7.4%	0.2%
22.8%	6.2%	0.0%	0.1%
18.7%	3.9%	0.4%	0.5%

Total fixed

21.6%

27.7%

11.1%

18.0%

17.4%

37.1%

24.7%

30.8%

27.7%

29.6%

14.5%

16.7%

21.8%

20.3%

17.2%

17.8%

28.1%

25.8%

37.1%

10.6%

17.1%

11.3%

12.1%

22.0%

21.0%

33.5%

29.1%

23.5%

Incumbent access lines used for broadband

Total incumbent access: Incumbent BB access Incumbent retail BB lines (excl

Denmark	1,546,675	1,243,674	1,134,342
Netherlands	3,711,000	3,034,000	3,034,000
Sweden	1,839,000	1,228,000	1,135,000
Finland	1,348,800	974,600	915,800
Germany	22,200,000	13,500,000	11,000,000
UK	13,798,816	8,049,123	4,756,565
Luxembourg	112,525	112,482	98,350
France	16,457,600	9,793,600	8,561,600
Belgium	1,768,804	1,671,647	1,389,053
Malta	47,624	47,624	43,638
Estonia	174,660	169,253	169,127
Slovenia	305,345	233,264	212,362
Ireland	679,578	656,325	470,907
Austria	1,174,740	903,479	839,680
Spain	7,335,338	5,604,845	5,195,477
Italy	11,550,588	8,328,588	6,843,588
Cyprus	133,254	108,938	108,938
Lithuania	280,957	280,490	278,419
Czech Rep.	707,399	647,097	592,539
Latvia	184,124	183,917	183,316
Portugal	1,092,246	800,901	753,586
Hungary	920,337	900,702	704,089
Greece	1,604,558	958,434	864,021
Slovakia	382,161	382,161	356,322
Romania	657,076	655,218	655,218
Bulgaria	256,126	256,124	247,751
Poland	2,524,583	2,516,638	2,110,769
EU total/average	92,793,914	63,241,124	52,654,457

inc access lines % total

Competitors BB lines means of access

Incumbent	Incumbent	Incumbent retail	BB sh	Own wireline	LLU + shared	ε Bitstream	Resale	Total compe
76.7%	61.7%	56.3%		469,622	303,001	75,794	33,538	881,955
61.2%	50.0%	50.0%		2,351,000	677,000	0	0	3,028,000
60.7%	40.5%	37.5%		1,190,000	611,000	0	93,000	1,894,000
83.4%	60.2%	56.6%		268,800	374,200	58,800	0	701,800
90.9%	55.3%	45.0%		2,232,000	8,700,000	300,000	2,200,000	13,432,000
78.5%	45.8%	27.1%		3,773,617	5,749,693	612,263	2,680,295	12,815,868
87.2%	87.2%	76.2%		16,469	43	0	14,132	30,644
94.4%	56.2%	49.1%		968,400	6,664,000	1,232,000	0	8,864,400
60.8%	57.4%	47.7%		1,141,035	97,157	282,594	0	1,520,786
45.7%	45.7%	41.9%		56,544	0	3,986	0	60,530
52.6%	51.0%	51.0%		157,150	5,407	106	20	162,683
69.3%	52.9%	48.2%		135,317	72,081	20,902	0	228,300
74.1%	71.5%	51.3%		237,914	23,253	185,418	0	446,585
65.7%	50.5%	47.0%		613,626	271,261	63,352	0	948,239
79.7%	60.9%	56.5%		1,863,811	1,730,493	353,657	55,711	4,003,672
96.8%	69.8%	57.3%		385,000	3,222,000	1,485,000	0	5,092,000
96.8%	79.2%	79.2%		4,379	24,316	0	0	28,695
46.3%	46.2%	45.9%		325,829	467	2,071	0	328,367
39.7%	36.3%	33.3%		1,072,912	60,302	54,558	0	1,187,772
46.6%	46.5%	46.4%		211,349	207	45	556	212,157
60.4%	44.3%	41.6%		717,320	291,345	47,119	196	1,055,980
54.7%	53.5%	41.8%		763,386	19,635	196,613	0	979,634
99.6%	59.5%	53.7%		5,733	646,124	94,413	0	746,270
58.6%	58.6%	54.7%		269,666	0	0	25,839	295,505
26.2%	26.1%	26.1%		1,850,697	1,858	0	0	1,852,555
30.1%	30.1%	29.1%		595,701	2	161	8,212	604,076
62.2%	62.0%	52.0%		1,534,707	7,945	405,869	0	1,948,521
80.0%	54.5%	45.4%		23,211,984	29,552,790	5,474,721	5,111,499	63,350,994

Comp BB lines means of access (% competitive lines) BB lines means of access (% all B

titive lines	Competitor	Unbundling	Bitstream	Resale	Incumbent	Competitor	Unbundling
	53.2%	34.4%	8.6%	3.8%	57.9%	23.3%	15.0%
	77.6%	22.4%	0.0%	0.0%	50.0%	38.8%	11.2%
	62.8%	32.3%	0.0%	4.9%	40.5%	39.3%	20.2%
	38.3%	53.3%	8.4%	0.0%	56.6%	16.6%	23.1%
	16.6%	64.8%	2.2%	16.4%	54.0%	9.1%	35.6%
	29.4%	44.9%	4.8%	20.9%	42.3%	21.5%	32.7%
	53.7%	0.1%	0.0%	46.1%	87.2%	12.8%	0.0%
	10.9%	75.2%	13.9%	0.0%	49.1%	5.6%	38.2%
	75.0%	6.4%	18.6%	0.0%	47.7%	39.2%	3.3%
	93.4%	0.0%	6.6%	0.0%	41.9%	54.3%	0.0%
	96.6%	3.3%	0.1%	0.0%	51.0%	47.4%	1.6%
	59.3%	31.6%	9.2%	0.0%	48.2%	30.7%	16.4%
	53.3%	5.2%	41.5%	0.0%	51.3%	25.9%	2.5%
	64.7%	28.6%	6.7%	0.0%	47.0%	34.3%	15.2%
	46.6%	43.2%	8.8%	1.4%	57.1%	20.3%	18.8%
	7.6%	63.3%	29.2%	0.0%	57.3%	3.2%	27.0%
	15.3%	84.7%	0.0%	0.0%	79.2%	3.2%	17.7%
	99.2%	0.1%	0.6%	0.0%	45.9%	53.7%	0.1%
	90.3%	5.1%	4.6%	0.0%	33.3%	60.3%	3.4%
	99.6%	0.1%	0.0%	0.3%	46.5%	53.4%	0.1%
	67.9%	27.6%	4.5%	0.0%	41.7%	39.6%	16.1%
	77.9%	2.0%	20.1%	0.0%	41.8%	45.3%	1.2%
	0.8%	86.6%	12.7%	0.0%	53.7%	0.4%	40.1%
	91.3%	0.0%	0.0%	8.7%	58.6%	41.4%	0.0%
	99.9%	0.1%	0.0%	0.0%	26.1%	73.8%	0.1%
	98.6%	0.0%	0.0%	1.4%	30.0%	69.9%	0.0%
	78.8%	0.4%	20.8%	0.0%	52.0%	37.8%	0.2%
	36.6%	46.6%	8.6%	8.1%	49.8%	20.0%	25.5%

iB lines)

Penetration by competitive type

Bitstream	Incumbent Competitor Regulated access			Incumbent Competitor Unbundling		
	Incumbent	Competitor	Regulated access	Incumbent	Competitor	Unbundling
3.8%	56.3%	23.3%	20.5%	22.9%	8.7%	5.6%
0.0%	50.0%	38.8%	11.2%	18.6%	14.4%	4.1%
0.0%	37.5%	39.3%	23.2%	13.6%	13.2%	6.8%
3.6%	56.6%	16.6%	26.8%	18.5%	5.1%	7.1%
1.2%	45.0%	9.1%	45.8%	16.4%	2.7%	10.6%
3.5%	27.1%	21.5%	51.5%	13.3%	6.2%	9.5%
0.0%	76.2%	12.8%	11.0%	24.5%	3.6%	0.0%
7.1%	49.1%	5.6%	45.3%	15.6%	1.5%	10.6%
9.7%	47.7%	39.2%	13.1%	15.9%	10.9%	0.9%
3.8%	41.9%	54.3%	3.8%	11.8%	14.0%	0.0%
0.0%	51.0%	47.4%	1.7%	12.6%	11.7%	0.4%
4.7%	48.2%	30.7%	21.1%	11.6%	6.8%	3.6%
20.2%	51.3%	25.9%	22.7%	15.6%	5.7%	0.6%
3.5%	47.0%	34.3%	18.7%	10.9%	7.4%	3.3%
3.8%	56.5%	20.3%	23.3%	12.8%	4.3%	4.0%
12.4%	57.3%	3.2%	39.4%	14.2%	0.7%	5.5%
0.0%	79.2%	3.2%	17.7%	14.2%	0.6%	3.2%
0.3%	45.9%	53.7%	0.4%	8.2%	9.6%	0.0%
3.1%	33.3%	60.3%	6.5%	6.3%	10.5%	0.6%
0.0%	46.4%	53.4%	0.2%	8.0%	9.2%	0.0%
2.6%	41.6%	39.6%	18.7%	7.6%	6.8%	2.8%
11.7%	41.8%	45.3%	12.8%	8.9%	7.6%	0.2%
5.9%	53.7%	0.4%	46.0%	8.6%	0.1%	5.8%
0.0%	54.7%	41.4%	4.0%	7.1%	5.0%	0.0%
0.0%	26.1%	73.8%	0.1%	2.9%	8.3%	0.0%
0.0%	29.1%	69.9%	1.0%	3.3%	7.8%	0.0%
10.0%	52.0%	37.8%	10.2%	6.6%	4.0%	0.0%
4.7%	45.4%	20.0%	34.6%			

Total

- 37.1%
- 37.1%
- 33.5%
- 30.8%
- 29.6%
- 29.1%
- 28.1%
- 27.7%
- 27.7%
- 25.8%
- 24.7%
- 22.0%
- 21.8%
- 21.6%
- 21.0%
- 20.3%
- 18.0%
- 17.8%
- 17.4%
- 17.2%
- 17.1%
- 16.7%
- 14.5%
- 12.1%
- 11.3%
- 11.1%
- 10.6%