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COMMUNICATIONS COMMITTEE

Working Document

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

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Broadband access in the EU as at 1 January 2005

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DEFINITIONS

Definitions used in the tables for the collection of data:

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

EU OVERVIEW: RETAIL FIXED BROADBAND LINES

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

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

Data refer to the situation at 1 January 2005.

In some cases information for some types of access is not available. In a number of countries certain figures are estimates, as the National Regulatory Authorities had not received consolidated data from operators. Where it has not been possible to validate some information or data appear to be inconsistent, figures in the tables have been highlighted in light grey ink.

The charts and tables in this document only include fixed broadband lines. Data on 3G mobile subscribers are only available for a 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 opposition to the former EU Member States, 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 40 064 671 broadband lines in the EU as of 1 January 2005, a 33% increase since 1 July 2004. Of these lines, 31 698 234 were DSL lines (79.1% of total) and 8 366 437 (20.9%) were provided using other transmission means, mostly cable modem.

Incumbent fixed operators provided 54% of these lines, continuing the downward trend recorded since 2003. This figure was 60% in January 2003 and 57% in January 2004.

In 2004 a total of 16 532 553 new broadband lines were added, with a 70.26% growth. Although in relative terms this growth is lower than in 2004 (83.9%), due to the number of lines, in absolute numbers it is higher than the growth recorded in 2003 (10 735 222 lines).

The large majority of the new lines were by means of xDSL technologies (14 258 273 new lines, 86% of net additions in 2004), while only 2 274 280 (14%) were connections using other type of technologies.

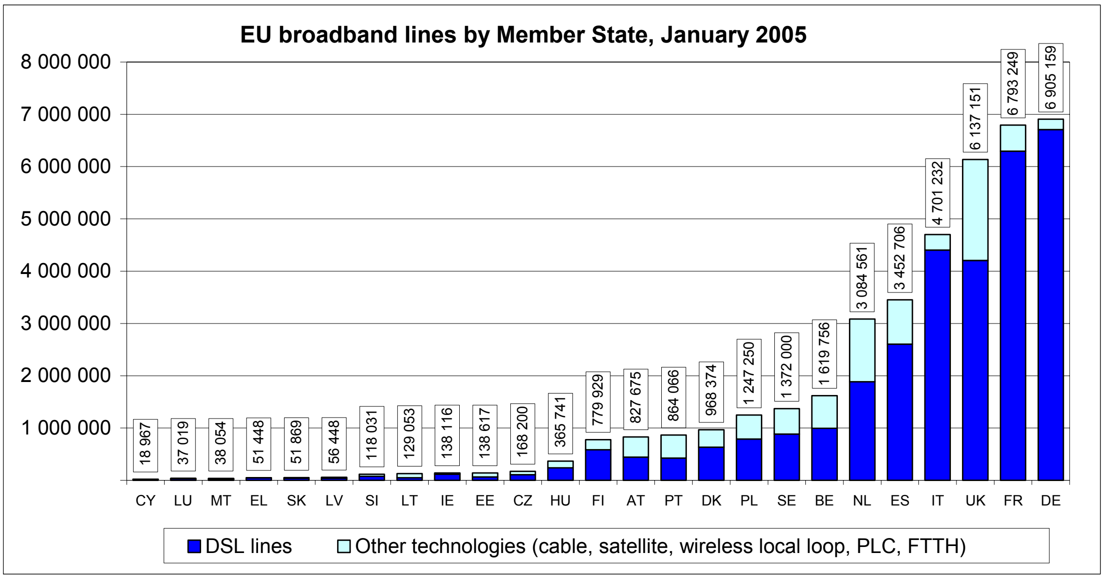
Table 1 shows how the broadband lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004 and 1 January 2005.

Table 1 Retail broadband lines in the EU by country

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	691 970	877 364	1 045 867	1 244 736	1 444 673	1 619 756
CZ				56 000	76 000	168 200
DK	360 659	448 981	558 600	678 698	839 150	968 374
DE	2 611 011	3 244 430	3 971 282	4 667 457	5 415 247	6 905 159
EE			58 515	58 515	102 771	138 617
EL	450	1 689	2 146	10 006	25 931	51 448
ES	814 337	1 304 770	1 776 418	2 228 169	2 767 627	3 452 706
FR	735 944	1 656 288	2 413 640	3 656 654	4 915 487	6 793 249
IE	1 344	7 387	9 469	34 050	67 530	138 116
IT	549 716	976 019	1 586 194	2 401 939	3 503 497	4 701 232
CY				10 063	14 520	18 967
LV					33 904	56 448
LT			42 518	64 982	88 279	129 053
LU		7 455	10 282	15 942	25 334	37 019
HU				187 228	257 016	365 741
MT					13 738	38 054
NL	1 016 704	1 213 861	1 579 508	1 908 044	2 372 529	3 084 561
AT	374 640	451 800	527 050	612 600	707 725	827 675
PL				497 972	609 435	1 247 250
PT	150 846	260 296	375 379	500 437	664 045	864 066
SI				60 398	76 339	118 031
SK				8 275	21 685	51 869
FI	152 300	269 700	334 950	447 444	572 100	779 929
SE	588 700	743 800	847 100	1 010 400	1 131 400	1 372 000
UK	716 630	1 333 056	2 205 503	3 172 109	4 395 561	6 137 151
EU15	8 765 251	12 796 896	17 243 388	22 588 685	28 847 836	37 732 441
EU10			101 033	943 433	1 293 687	2 332 230
EU25	8 765 251	12 796 896	17 344 421	23 532 118	30 141 523	40 064 671

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

Figure 1 EU countries by number of broadband lines



Germany and France account each for 17% of all broadband lines, followed by the UK, Italy, Spain and the Netherlands. These 6 countries concentrate 77.5% of all EU broadband connections. The new Member States contribute 2.3 million broadband lines, which represent 6% of the total.

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

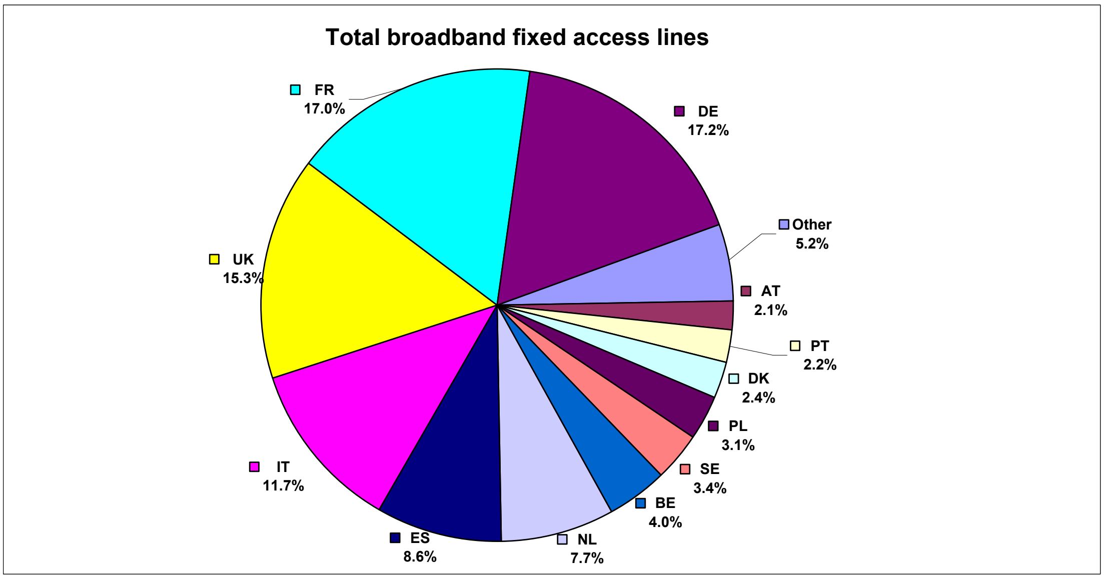
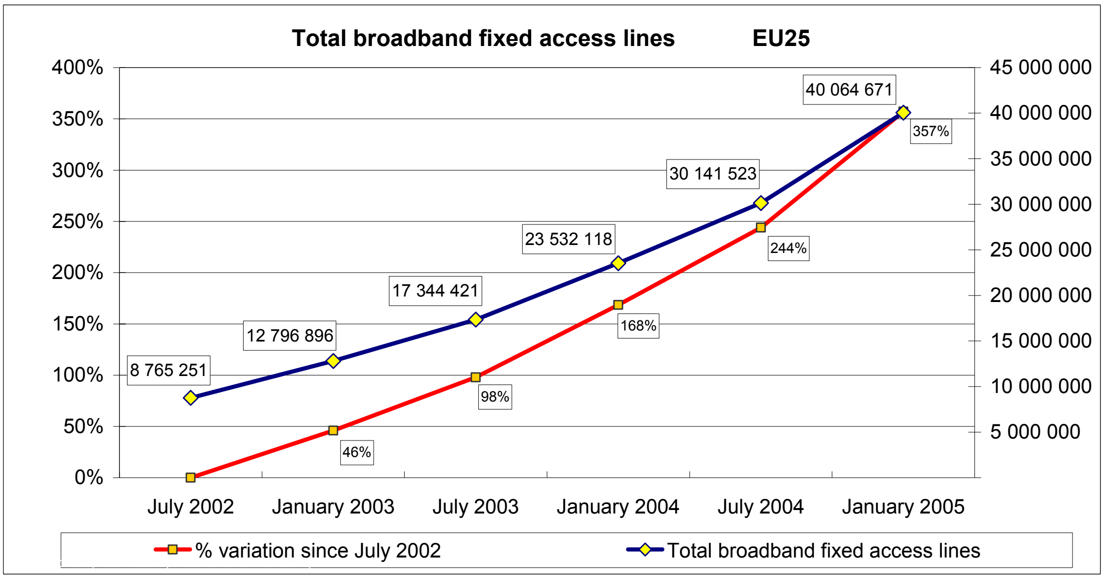


Figure 3 Growth trend since July 2002



The number of broadband lines added per day in the 2004 was 45 295, i.e. 15 883 more connections than the 29 412 new lines per day of 2003. In other words, at the end of 2004 there were 54% more lines added every day than a year before.

As in 2003, the increase in the last quarter was stronger with 68 439 new daily connections. Per day net additions in the first half was 36 315 lines.

Figure 4 shows that France was again the most dynamic broadband market in the EU, adding 3 136 595 new lines in the year, followed by the United Kingdom, Italy and Germany.

Figure 4 Broadband lines added, by country

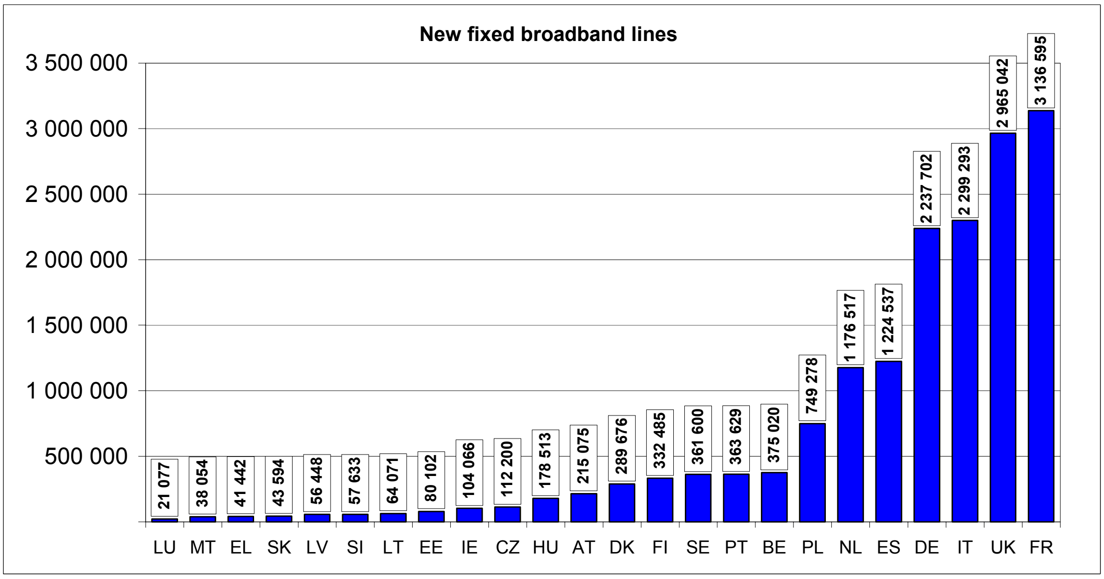


Figure 5 shows the penetration rate of broadband measured as the number of broadband lines per 100 population. Last year only Denmark, Belgium, the Netherlands and Sweden had a penetration rate above 10%. In 2004 Finland, France, the UK, Estonia and Austria have joined this group and even at EU15 level the penetration rate is now 10%, rising from 6% in January 2004. At EU25 level the penetration rate is 8.6%. Figure 6 combines the penetration rate as at January 2005 and the growth of this indicator in percentage points during 2004.

Figure 5 Penetration rate. Lines per 100 population

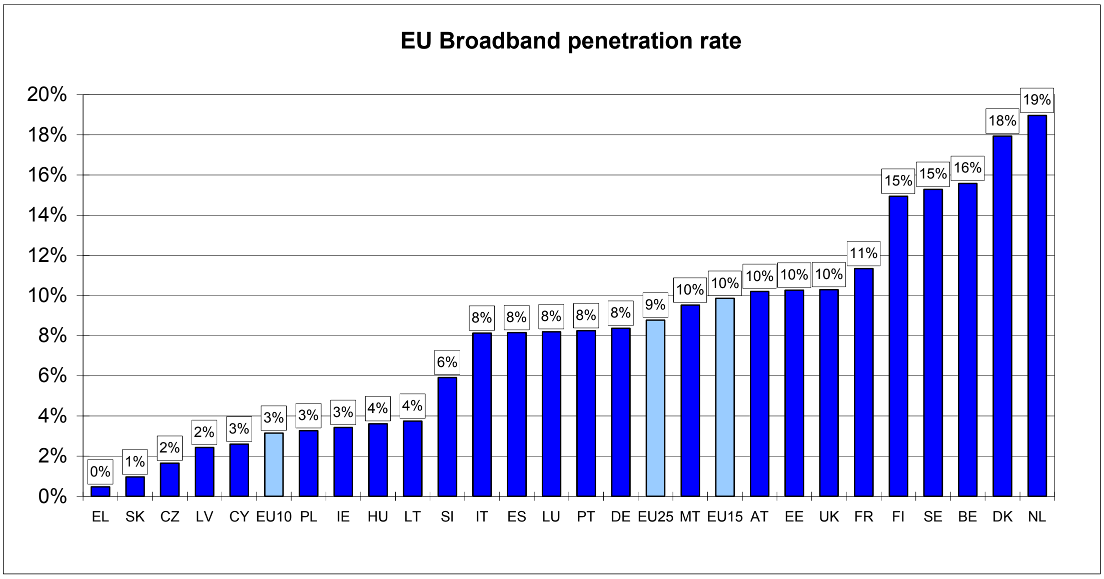


Figure 6 Penetration rate and speed of progress

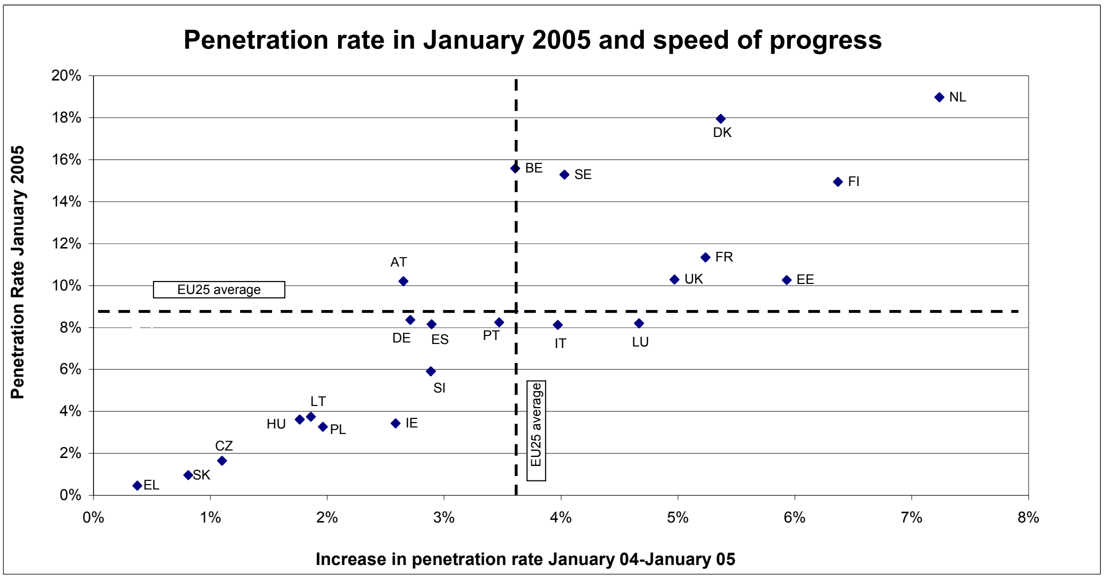


Figure 7 shows the percentage of broadband lines provided by the incumbent fixed operators and by the other operators. Figure 8 displays the trend in the percentage of broadband lines provided by the incumbent fixed operators.

Figure 7 Broadband lines market share

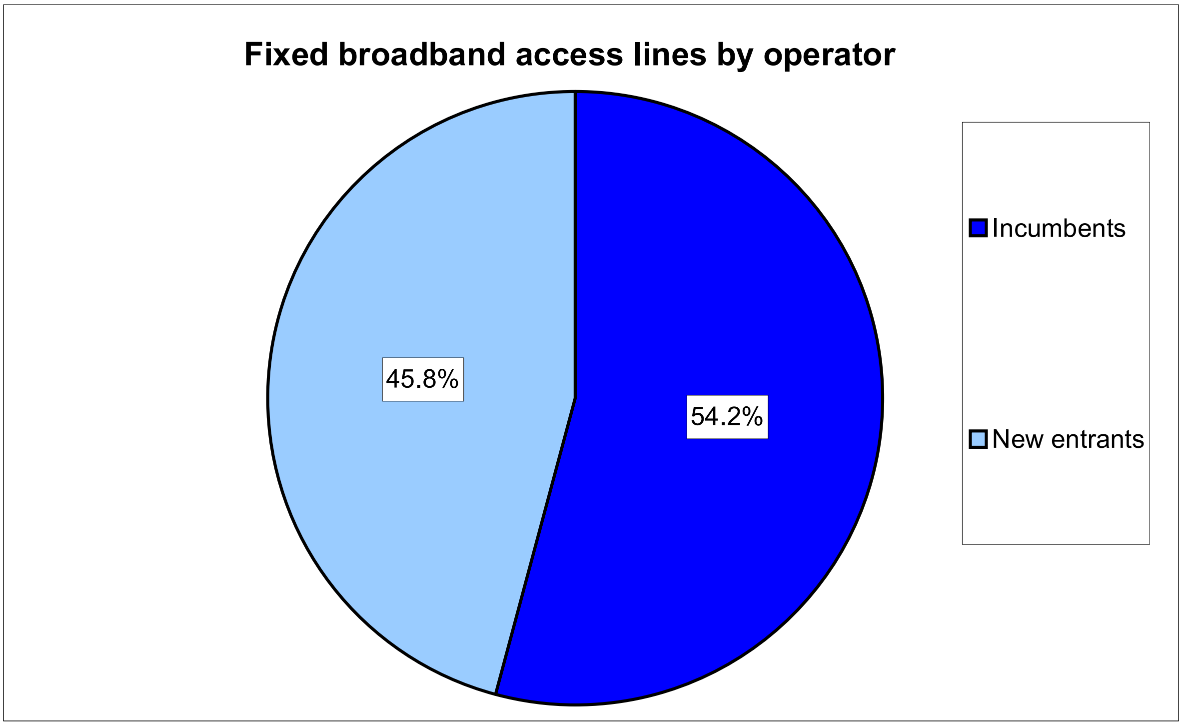
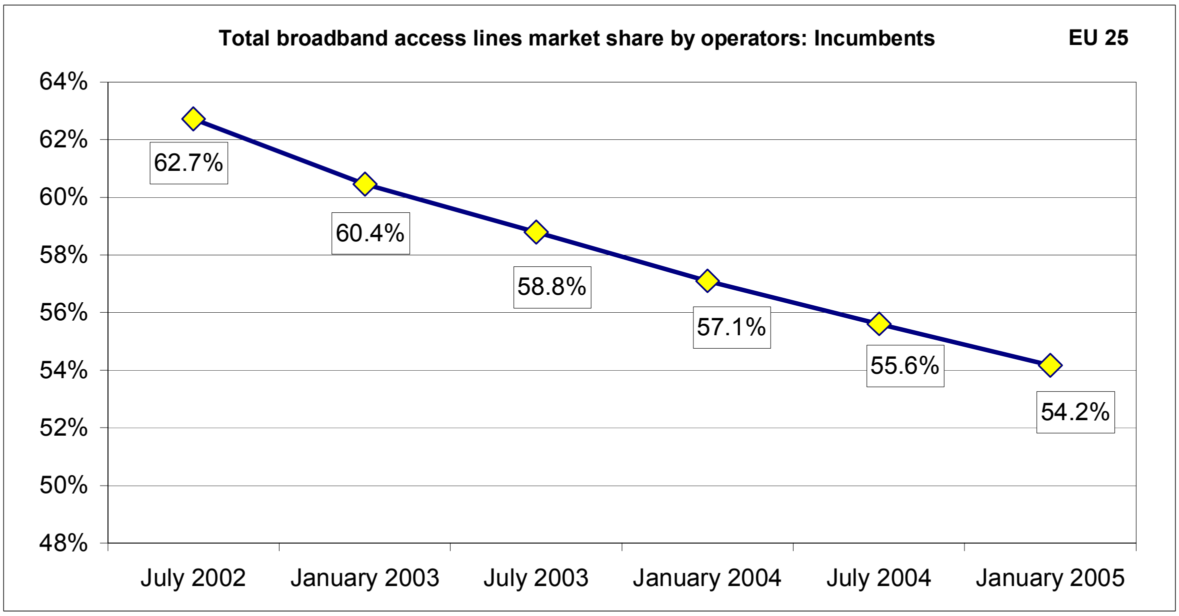


Figure 8 Trend in the percentage of broadband lines provided by the incumbent fixed operators



DSL LINES

There were 31 698 234 DSL lines in the EU as of 1 January 2005, a 82% increase since 1 January 2004.

In 2004 a total of 14 258 273 new DSL lines were added. This represents 5 936 043 more lines than the 8 322 230 new lines installed in 2003.

Incumbent fixed operators provided 66.2% of these lines, down from 74.3% in January 2004 and 81.1% in January 2003.

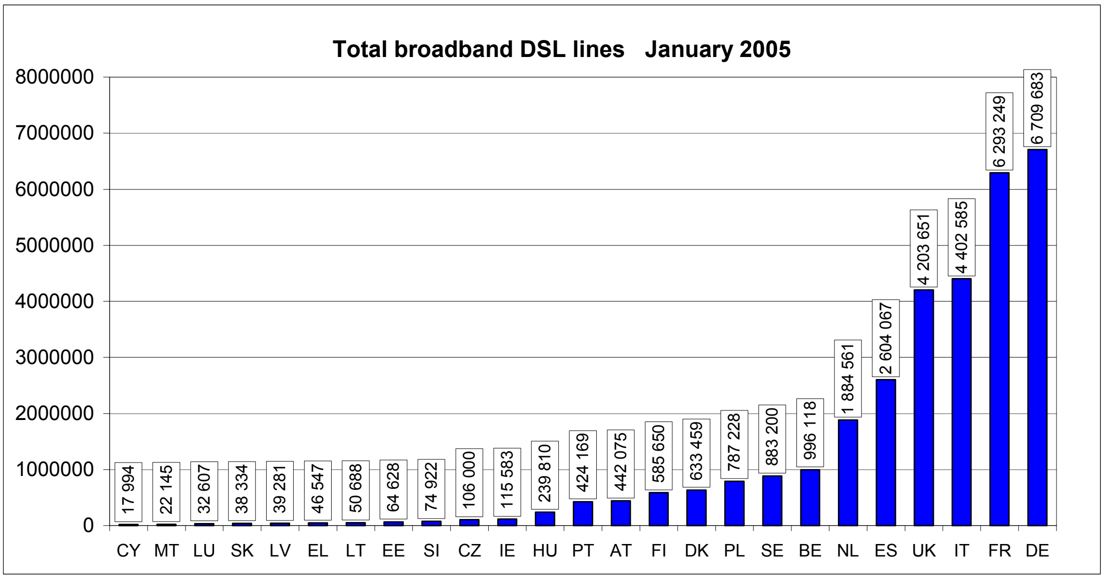
Table 2 shows how the DSL lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004 and 1 January 2005.

Table 2 DSL retail lines in the EU by country

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	401 453	523 619	627 970	765 183	889 294	996 118
CZ				21 000	36 000	106 000
DK	234 602	307 812	389 805	473 193	562 112	633 459
DE	2 570 011	3 185 015	3 884 020	4 498 086	5 286 141	6 709 683
EE			37 558	37 558	50 906	64 628
EL	93	93	359	8 588	22 937	46 547
ES	643 625	957 204	1 297 563	1 676 466	2 086 172	2 604 067
FR	526 413	1 406 769	2 099 933	3 262 800	4 490 487	6 293 249
IE	990	3 287	5 369	24 400	57 445	115 583
IT	487 876	835 525	1 387 658	2 158 458	3 223 188	4 402 585
CY				10 033	14 490	17 994
LV					26 815	39 281
LT			15 444	26 438	34 074	50 688
LU		6 858	8 960	13 860	22 128	32 607
HU				117 369	165 980	239 810
MT					11 426	22 145
NL	216 704	413 861	679 508	978 044	1 374 129	1 884 561
AT	138 640	179 600	224 650	279 600	355 725	442 075
PL				132 972	195 752	787 228
PT	5 542	52 810	113 040	184 860	293 435	424 169
SI				38 330	53 840	74 922
SK				4 210	17 100	38 334
FI	112 300	215 200	271 000	328 704	400 000	585 650
SE	357 200	439 800	495 300	595 200	686 200	883 200
UK	294 100	590 278	1 099 518	1 804 609	2 753 061	4 203 651
EU15	5 989 549	9 117 731	12 584 653	17 052 051	22 502 454	30 257 204
EU10			53 002	387 910	606 383	1 441 030
EU25	5 989 549	9 117 731	12 637 655	17 439 961	23 108 837	31 698 234

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

Figure 9 EU countries by number of DSL lines



Germany accounts for 21% of all DSL lines and, when combined with France and Italy, provides 55% of all DSL lines, as shown in Figure 10. Since January 2004 the UK has seen an increase of 3 percentage points, from 10 to 13% of the total, followed by France (+1 point), while in many other countries there has been a reduction (-4 points in Germany, -1.5 in Italy, Spain and Belgium). The new Member States contribute 1.441 million DSL lines, which represent 4.5% of the total DSL lines.

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

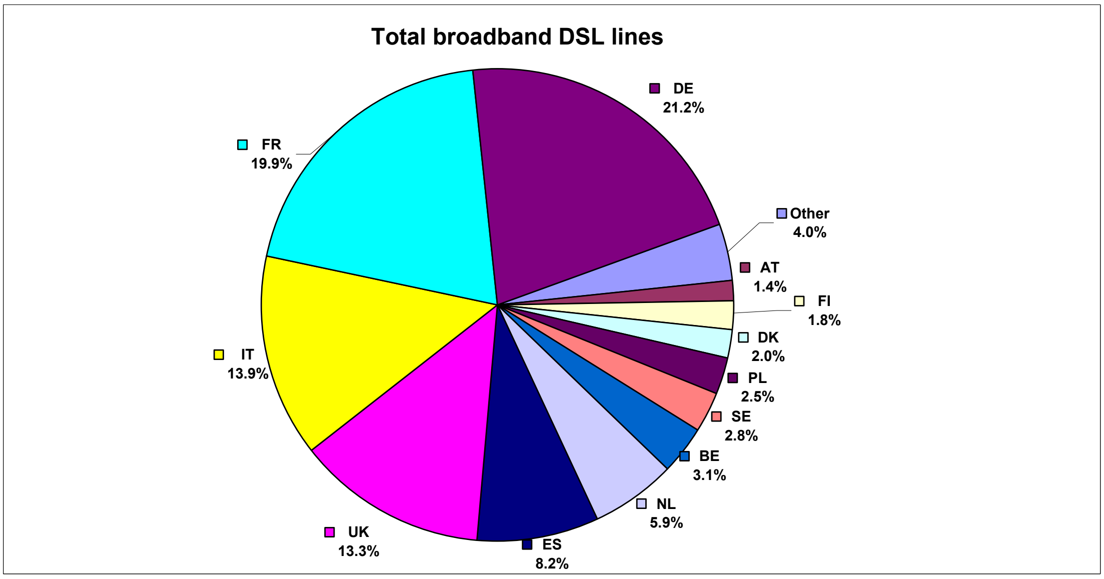
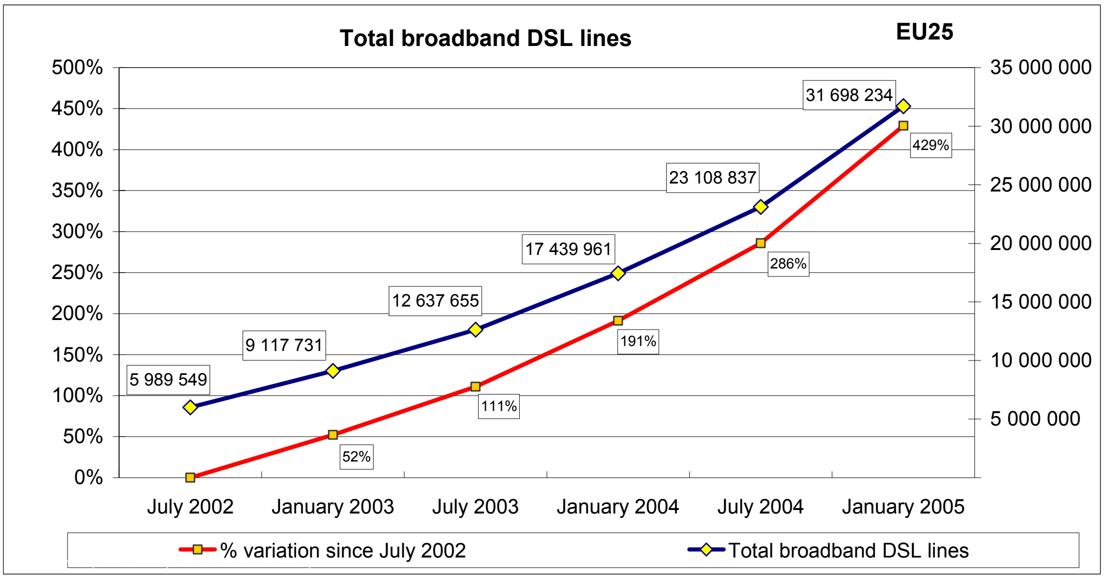


Figure 11 Growth trend since July 2002



The number of DSL lines added each day in 2004 was 39 064, which means that 71% more lines per day were added than a year before, when 22 801 new connections per day were registered.

France added 3 030 449 new lines over the period, followed by the UK, Italy and Germany.

Figure 12 DSL lines added, by country

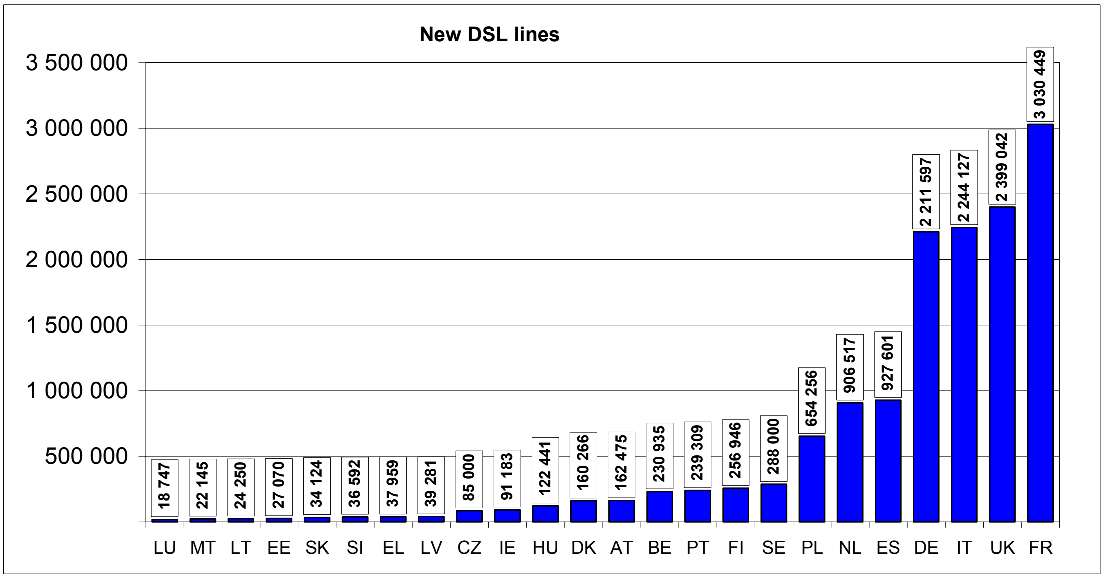


Figure 13 shows the percentage of DSL lines provided by the incumbent fixed operators and the new entrants. Figure 14 displays the trend in the percentage of DSL lines provided by incumbent fixed operators.

Figure 13 DSL lines market share by operator

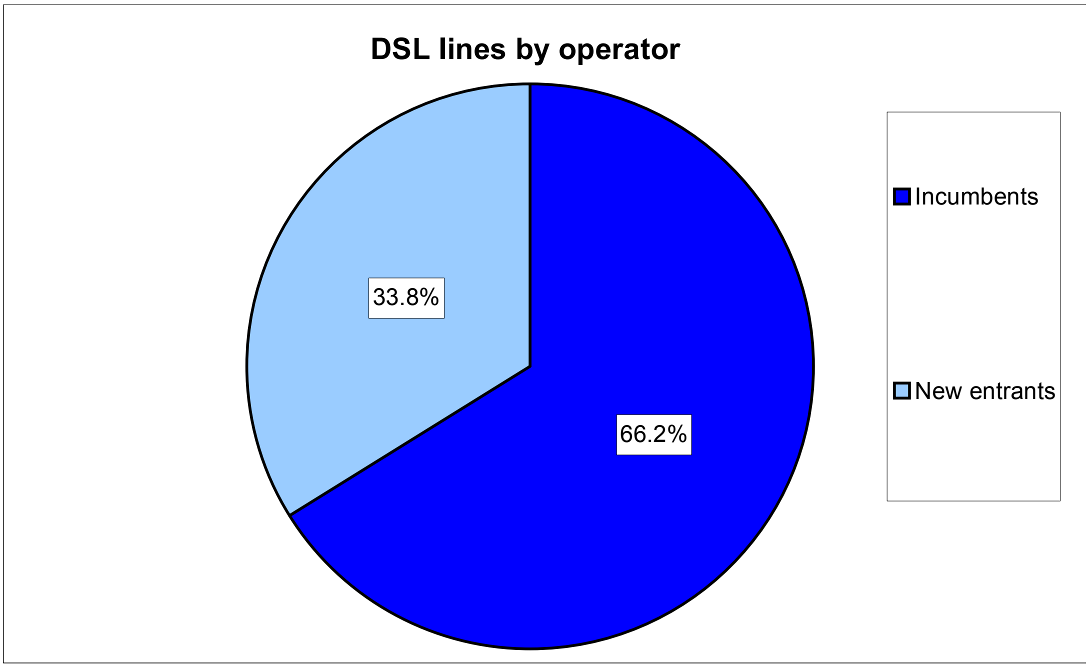


Figure 14 Trend in the % of DSL lines provided by incumbent fixed operators

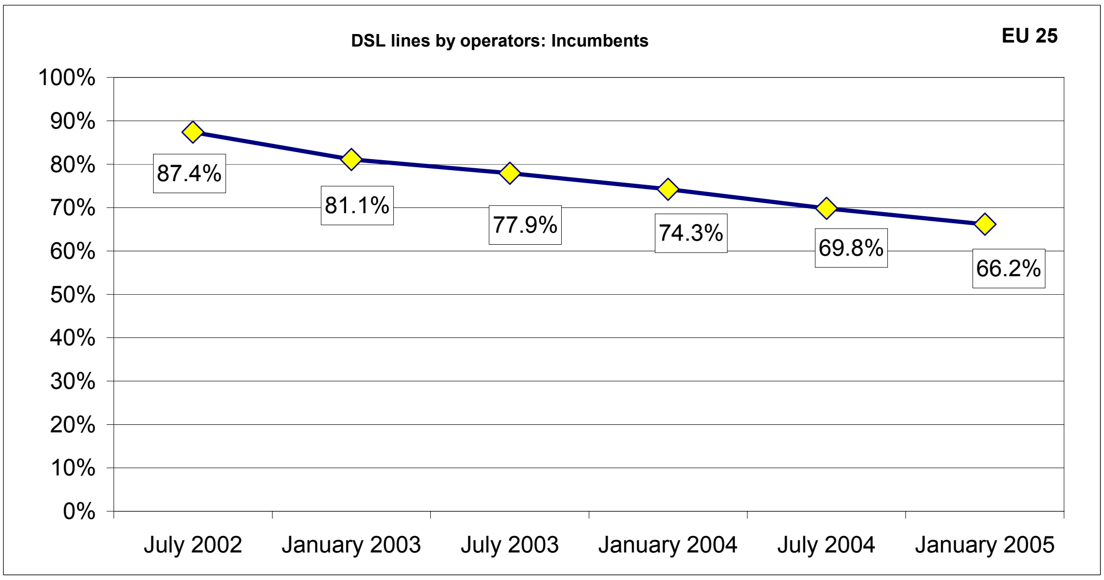
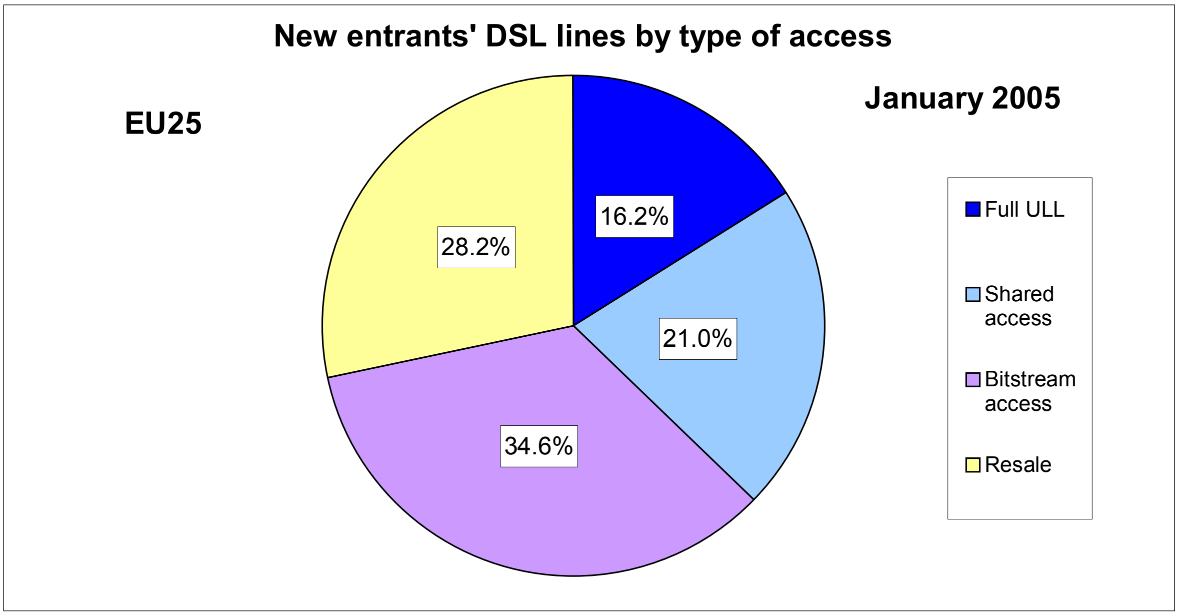


Figure 15 displays the type of access used by new entrants' to provide DSL lines to their customers. Bitstream access (34.6%) and resale lines (28.2%) are the most common types. There has been a significant reduction in the number of resale lines since January 2004, when this type of lines represented 45% of new entrant's DSL lines. Shared access lines, on the other hand, now account for 21% of these lines compared to 11% a year ago.

Figure 15 New entrants' DSL lines by type of access



FIXED BROADBAND LINES USING TECHNOLOGIES OTHER THAN DSL

There were 8 366 437 broadband lines using other technologies in the EU as of 1 January 2005. 2 274 280 lines were added, which represents a 37.3% increase since 1 January 2004. Contrary to developments in the DSL segment, net additions in 2004 were lower than in 2003, when 2 412 992 new lines were sold (53% increase). This means that, in 2004, there were 138 712 new lines fewer than in 2003.

Alternative operators provided 91.2% of these lines, slightly below the percentage of January 2004.

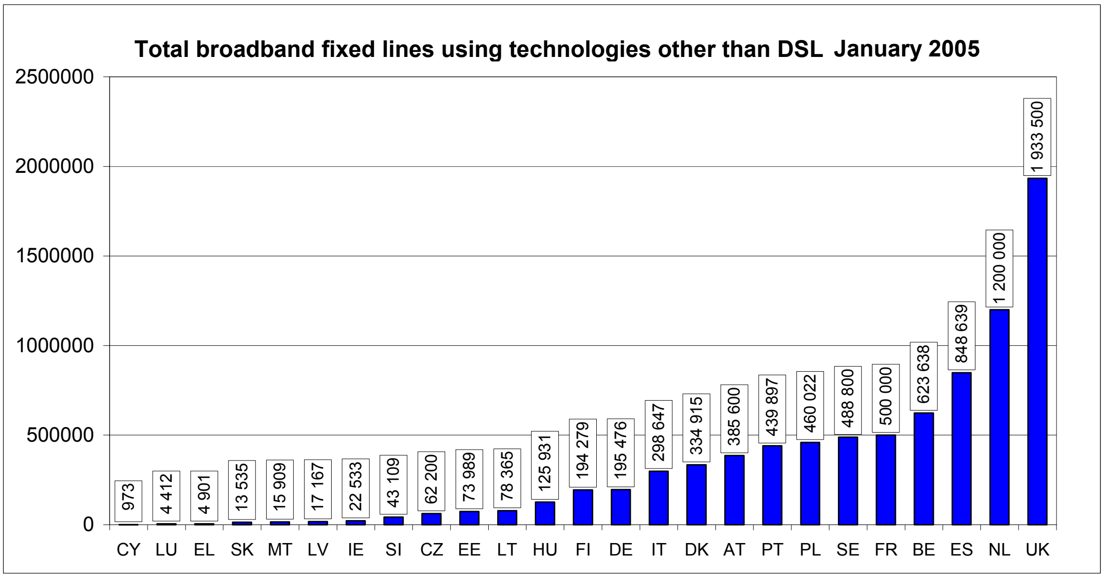
Table 3 shows how the non-DSL broadband lines in the EU were distributed between the EU Member States at 1 July 2002 (EU15 only), 1 January 2003 (EU15 only), 1 July 2003, 1 January 2004, 1 July 2004 and 1 January 2005.

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

	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	290 517	353 745	417 897	479 553	555 379	623 638
CZ				35 000	40 000	62 200
DK	126 057	141 169	168 795	205 505	277 038	334 915
DE	41 000	59 415	87 262	169 371	129 106	195 476
EE			20 957	20 957	51 865	73 989
EL	357	1 596	1 787	1 418	2 994	4 901
ES	170 712	347 566	478 855	551 703	681 455	848 639
FR	209 531	249 519	313 707	393 854	425 000	500 000
IE	354	4 100	4 100	9 650	10 085	22 533
IT	61 840	140 494	198 536	243 481	280 309	298 647
CY				30	30	973
LV					7 089	17 167
LT			27 074	38 544	54 205	78 365
LU		597	1 322	2 082	3 206	4 412
HU				69 859	91 036	125 931
MT					2 312	15 909
NL	800 000	800 000	900 000	930 000	998 400	1 200 000
AT	236 000	272 200	302 400	333 000	352 000	385 600
PL				365 000	413 683	460 022
PT	145 304	207 486	262 339	315 577	370 610	439 897
SI				22 068	22 499	43 109
SK				4 065	4 585	13 535
FI	40 000	54 500	63 950	118 740	172 100	194 279
SE	231 500	304 000	351 800	415 200	445 200	488 800
UK	422 530	742 778	1 105 985	1 367 500	1 642 500	1 933 500
EU15	2 775 702	3 679 165	4 658 735	5 536 634	6 345 382	7 475 237
EU10			48 031	555 523	687 304	891 200
EU25	2 775 702	3 679 165	4 706 766	6 092 157	7 032 686	8 366 437

Figure 16 displays the distribution by country, Figure 17 presents this distribution in percentage terms at 1 January 2004 and Figure 18 shows the growth rate since July 2002.

Figure 16 EU countries by number of broadband lines using other technologies



The UK accounts for 23% of all broadband lines using other technologies, as shown in Figure 17, almost 1 percentage point up since 2004. The Netherlands has the second largest individual share, with 14%, followed by Spain and Belgium with 10% and 7.5% respectively. These four countries account for 55% of the market in the EU.

Figure 17 EU distribution of broadband lines using other technologies by country (% of lines)

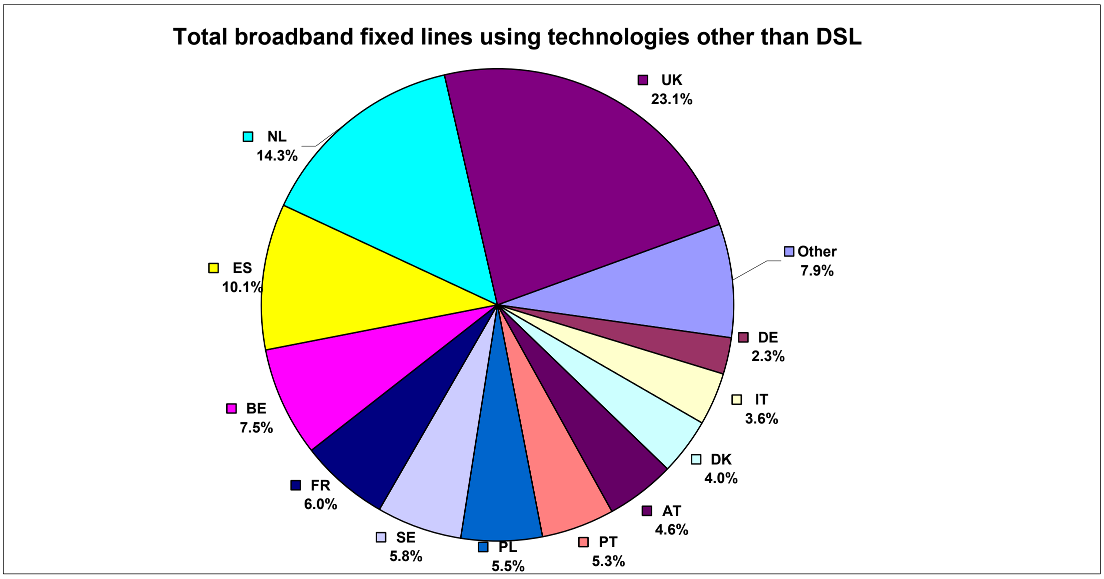
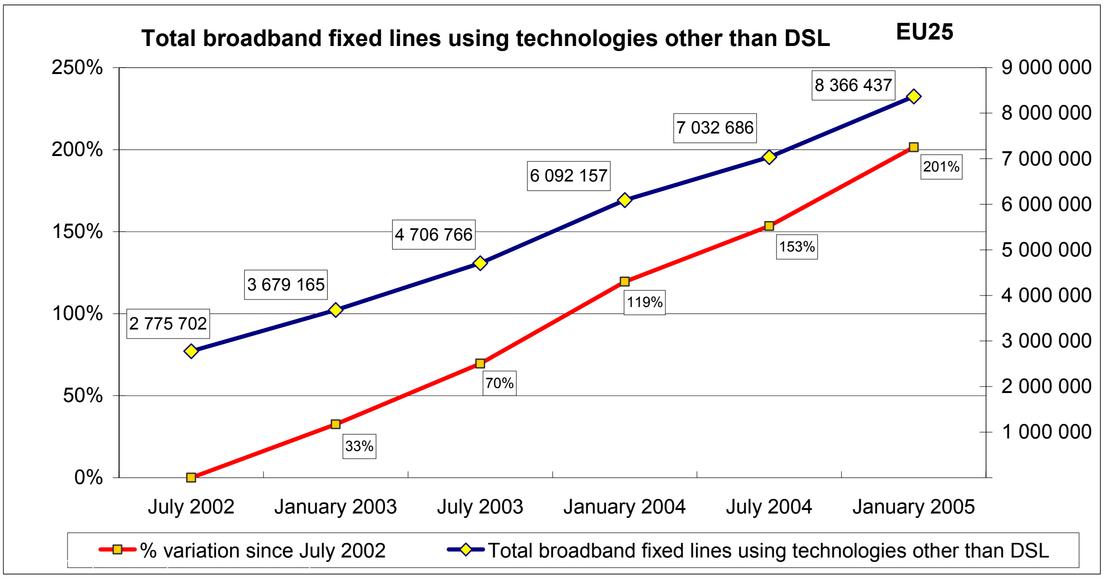


Figure 18 Growth trend since July 2002



6 231 broadband lines using other technologies were added each day in 2003. This compares to the 6 611 new lines per day in 2004 and represents a 5.7% decrease.

The UK added 566 000 lines using technologies other than DSL, which compares with the 2.4 million new DSL connections in the same period. For the sake of comparison, in 2003 there were 624 722 new connections using other technologies and 1.2 million new DSL lines. The Netherlands and Spain altogether also added some 566 000 lines.

Figure 19 Broadband lines using other technologies added by country

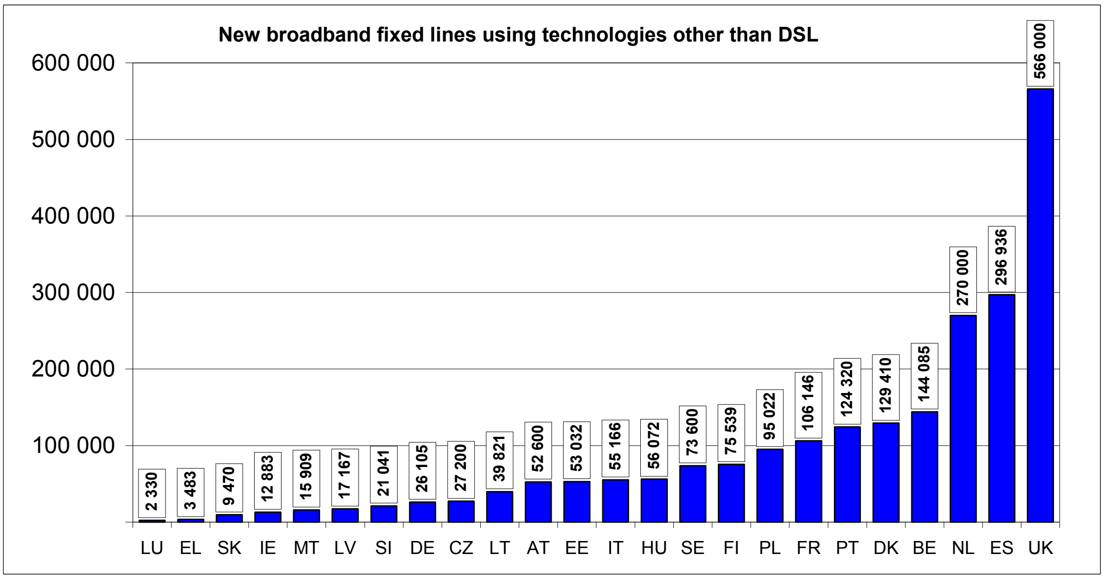


Figure 20 and 21 show the percentage of broadband lines using other technologies provided by the incumbent fixed operators and the alternative operators and the trend since July 2002.

Figure 20 Broadband lines using other technologies: market share

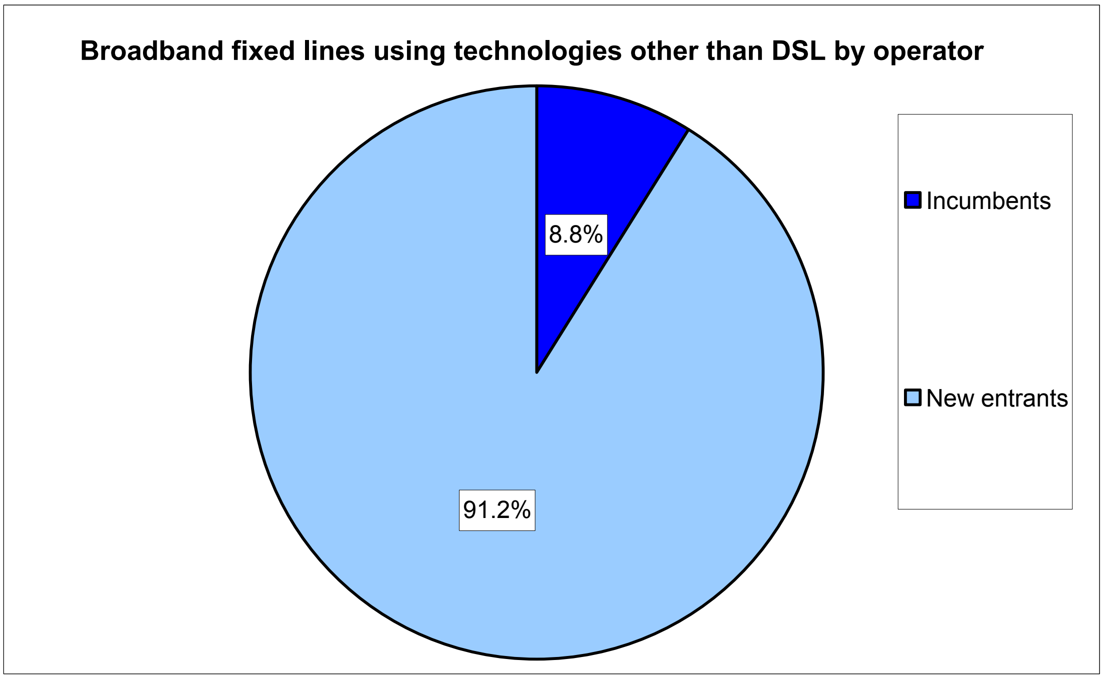
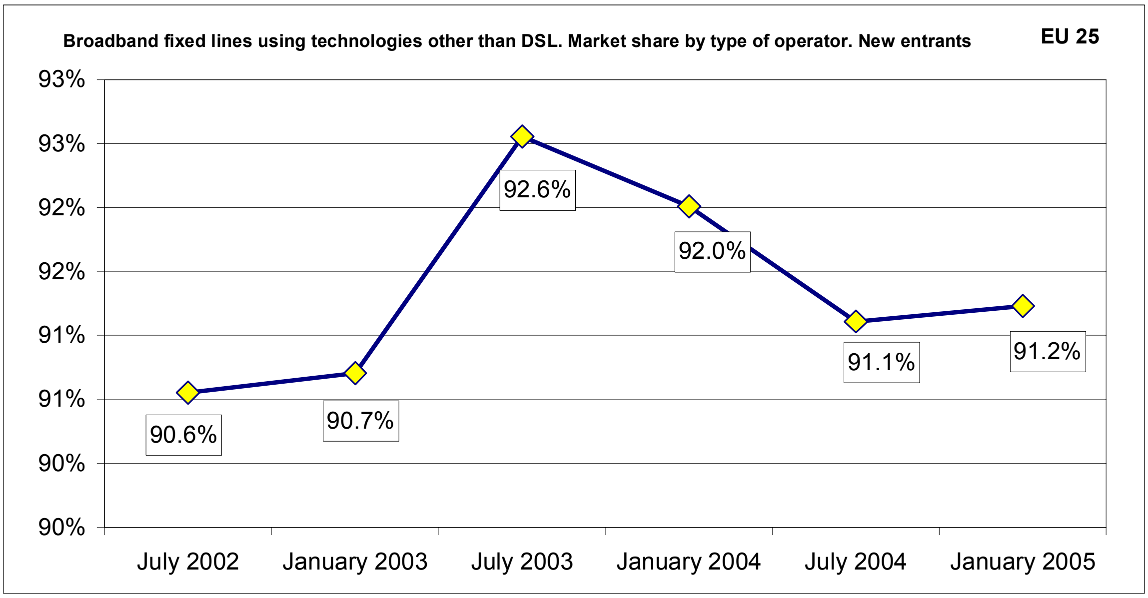


Figure 21 Trend in the % of lines using technologies other than DSL provided by new entrants



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

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

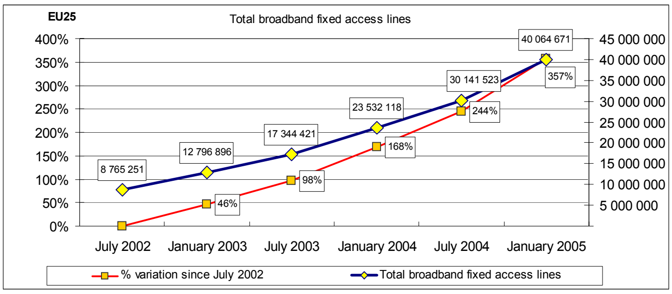
Availability of wholesale access 1 January 2005											
		Fully unbundled lines supplied by the incumbent to new entrants			Shared access lines supplied by the incumbent to new entrants			Wholesale DSL lines supplied			
								Bitstream access		Simple resale	
Country	Incumbent's PSTN activated main lines	Unbundled lines	Requested lines	N. of agreements	Shared lines	Requested lines	N. of agreements	No. of lines	No. of agreements	No. of lines	No. of agreements
Belgium	4,453,896	5,383	114	8	2,461		8	114,587	11	77,725	25
Czech Republic	3,517,000	10,035	n.a.	4	10,247	n.a.	2	1		n.a.	21
Denmark	3,370,717	55,288	n.a.	18	39,009	na	5	80,240	9		
Germany	37,100,000	1,958,251		93	2,683		12			246,000	17
Estonia	426,000	2,917	2,943	3						n.a.	3
Greece	5,600,000	1,787	249	12	928	160	1	43,832	10		
Spain	16,884,000	77,418	14,900	11	36,536	4,600	11	686,028	30		
France	33,655,000	95,190		18	1,495,517		18	1,634,243	5	134,991	20
Ireland	1,590,000	328	6	3	1,340	12	3	25,143	8	n.a.	
Italy	26,165,000	839,759	1,079,277	26	29,865	46,106	5	895,000	218		
Cyprus	420,000	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	2,647	n.a.	n.a.	n.a.
Latvia	600,000			1		3	1			1419	12
Lithuania	813,485							3,223	13		
Luxembourg	242,000	2,400	152	3	9	20	3			3,636	4
Hungary	3,564,000			1				64,484	18		
Malta	204,721									12,393	18
Netherlands	7,400,000	48,463	n.a.	12	413,751	n.a.	12		1		
Austria	2,930,000	71,560	3,720	23	35	n.a.	23	85,200	38		
Poland	11,117,504										
Portugal	3,948,371	8,776	1,255	2	4	2	1	37,090	8		
Slovenia	700,000					1,592	1	1,271	4		
Slovakia	1,288,749										
Finland	2,567,592	145,300	n.a.	n.a.	28,050	n.a.	n.a.	49,200	n.a.	n.a.	n.a.
Sweden	5,400,000	23,857	n.a.	118	152,604	n.a.	118	3,200	26	144,000	n.a.
United Kingdom	29,600,000	10,899		62	16,902		12	341,897	30	3,833,653	827
EU15	180,906,576	3 344 659	1099673	409	2 219 694	50900	232	3 995 660	394	4440005	893
EU10	22,651,459	12,952	2,943	9	10,247	1,595	4	71,626	35	13,812	54
EU25	203,558,035	3,357,611	1,102,616	418	2,229,941	52,495	236	4,067,286	429	4,453,817	947

BROADBAND RETAIL LINES, 1 JANUARY 2005

January 05		New entrants' DSL lines on PSTN January 2005					Incumbents' access lines by other means									New entrants' access lines by other means								
	Incumbent's DSL lines	Full ULL	Shared access	Bitstream access	Resale	Total	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Total	WLL	Cable modem	Leased lines	3G	Fiber to the home	Satellite	PLC	Other	Total
BE	803 638	3 178	2 416	110 688	76 198	192 480			41						41	8	622 777	771					41	623 597
CZ	100 000	n.a.	n.a.		6 000	6 000	1 000		n.a.		n.a.				1 000		60 000	n.a.		n.a.	1 200	n.a.		61 200
DK	474 388	50 073	39 471	69 527		159 071		120 818	3 660					1 894	126 372	3 622	156 923	5 763					42 235	208 543
DE	5 550 000	911 000	2 683		246 000	1 159 683			n.a.		n.a.	4 376			4 376	n.a.	145 000	n.a.		n.a.	36 800	9 300	n.a.	191 100
EE	64 542	61			25	86	720		150		1 664				2 534	2 346	43 232			8 019			17 858	71 455
EL	19 976	1 787	928	23 856		26 571			n.a.							221		4 675		5				4 901
ES	1 804 085	77 418	36 536	686 028		799 982	350		n.a.		n.a.	2 581			2 931	8 903	817 737	11 076		1 618	1 764	3 055	1 555	845 708
FR	2 933 308	95 190	1 495 517	1 634 243	134 991	3 359 941	n.a.	100 000	n.a.		n.a.	n.a.	n.a.	n.a.	100 000	n.a.	400 000	n.a.		n.a.	n.a.	n.a.	n.a.	400 000
IE	88 772	328	1 340	25 143		26 811	n.a.	n.a.	2 307		n.a.	n.a.	n.a.	n.a.	2 307	11 000	8 045	961			220		n.a.	20 226
IT	3 411 637	378 831	29 600	581 525	992	990 948			861		76	24 905		254	26 096	433	20	3 846		183 839	84 402		11	272 551
CY	17 994	n.a.	n.a.	n.a.	n.a.		n.a.	n.a.	22		n.a.	n.a.	n.a.	951	973	n.a.	n.a.	n.a.		n.a.	n.a.	n.a.	n.a.	
LV	38 995	31	7	150	98	286	304								304	1 881	7 828	804		497	4	172	5 677	16 863
LT	47 465			3 223		3 223			134		39				173	9 019	32 227	1 193		5 588	1	43	30 121	78 192
LU	27 906	1 056	9		3 636	4 701		584	257						841	43	3 497	10					21	3 571
HU	175 326			64 484		64 484	1 200	12 431	1 500		n.a.	n.a.		n.a.	15 131	7 300	99 000	3 500		1 000	n.a.		n.a.	110 800
MT	9 752				12 393	12 393											15 909							15 909
NL	1 422 347	48 463	413 751	n.a.		462 214			n.a.		n.a.	n.a.				n.y.a.	1 200 000	n.a.		n.a.	n.a.	n.a.	n.a.	1 200 000
AT	298 400	58 440	35	85 200		143 675			n.a.		n.a.			n.a.			380 000	n.a.		1 000	n.a.	4 600	n.a.	385 600
PL	683 644	n.a.	n.a.	n.a.	103 584	103 584											460 022							460 022
PT	383 034	7 870	4	33 261		41 135	n.a.	314 936	1 272		n.a.	n.a.			316 208	1 371	120 022	2 010		n.a.	n.a.	286		123 689
SI	73 651			1 271		1 271		842	n.a.		275				1 117	225	40 190			1 418			159	41 992
SK	38 334															1 100	9 235	200			n.a.		3 000	13 535
FI	440 000	68 400	28 050	49 200		145 650	112	60 400			35			63 200	123 747	3 200	51 950			132		950	14 300	70 532
SE	526 000	24 000	186 000	3 200	144 000	357 200			7 000						7 000	7 800	249 000	n.a.		220 000	900	100	4 000	481 800
UK	1 536 902	10 899	16 902	341 897	2 297 051	2 666 749			n.a.			2 500			2 500	2 500	1 925 000	n.a.			3 500			1 931 000
EU15	19 720 393	1736933	2253242	3643768	2902868	10 536 811	462	596738	15398		111	34362	0	65348	712 419	39101	6079971	29112		406594	127586	18291	62163	6 762 818
EU10	1 249 703	92	7	69 128	122 100	191 327	3 224	13 273	1 806		1 978			951	21 232	21 871	767 643	5 697		16 522	1 205	215	56 815	869 968
EU25	20 970 096	1 737 025	2 253 249	3 712 896	3 024 968	10 728 138	3 686	610 011	17 204		2 089	34 362		66 299	733 651	60 972	6 847 614	34 809		423 116	128 791	18 506	118 978	7 632 786

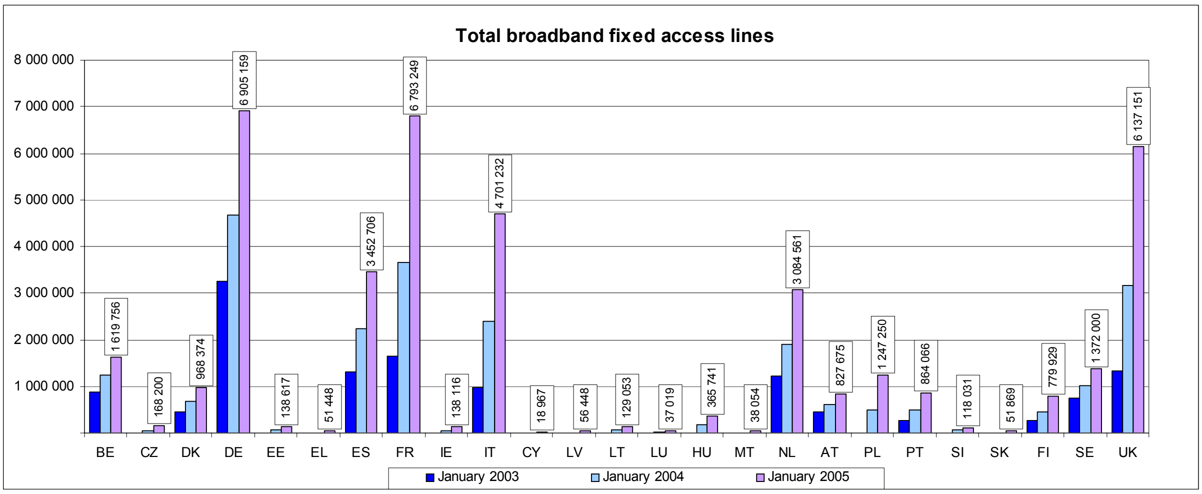
Czech Republic: The number of lines is understated since it refers to lines above 264 Kbit/s only and WLL and LANs/WANs users (around 210 000) are not included
Greece: Data refer to operators that have filled in the questionnaire
France: Number of cable modem lines is an estimate
Italy: Only licensed operators with available data, excluding ISP. In addition to consolidated data directly provided by the companies, Agcom estimates that other small operators and ISPs constitute an incremental 5%.
Hungary: NEs cable modem lines supplied by the three largest operators
Netherlands: Only licensed operators with available data, excluding ISP

Total broadband access retail fixed lines in EU25



Total broadband lines		% variation since July 2002	Variation January 04-January 05	
July 2002	8 765 251		%	70.26%
October 2002	10 298 146	17%	New lines	16 532 553
January 2003	12 796 896	46%	Lines/day	45295
July 2003	17 344 421	98%		
October 2003	19 394 914	121%	Variation January 03-January 04	
January 2004	23 532 118	168%		
July 2004	30 141 523	244%	%	83.89%
October 2004	33 768 247	285%	New lines	10 735 222
January 2005	40 064 671	357%	Lines/day	29412

Variation lines/day: 54%

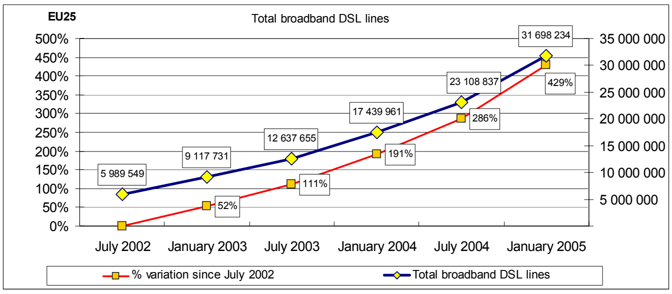


	July 2002	Jan. 2003	July 2003	January 200	July 2004	Jan. 2005
BE	691 970	877 364	1 045 867	1 244 736	1 444 673	1 619 756
CZ				56 000	76 000	168 200
DK	360 659	448 981	558 600	678 698	839 150	968 374
DE	2 611 011	3 244 430	3 971 282	4 667 457	5 415 247	6 905 159
EE			58 515	58 515	102 771	138 617
EL	450	1 689	2 146	10 006	25 931	51 448
ES	814 337	1 304 770	1 776 418	2 228 169	2 767 627	3 452 706
FR	735 944	1 656 288	2 413 640	3 656 654	4 915 487	6 793 249
IE	1 344	7 387	9 469	34 050	67 530	138 116
IT	549 716	976 019	1 586 194	2 401 939	3 503 497	4 701 232
CY				10 063	14 520	18 967
LV					33 904	56 448
LT			42 518	64 982	88 279	129 053
LU		7 455	10 282	15 942	25 334	37 019
HU				187 228	257 016	365 741
MT					13 738	38 054
NL	1 016 704	1 213 861	1 579 508	1 908 044	2 372 529	3 084 561
AT	374 640	451 800	527 050	612 600	707 725	827 675
PL				497 972	609 435	1 247 250
PT	150 846	260 296	375 379	500 437	664 045	864 066
SI				60 398	76 339	118 031
SK				8 275	21 685	51 869
FI	152 300	269 700	334 950	447 444	572 100	779 929
SE	588 700	743 800	847 100	1 010 400	1 131 400	1 372 000
UK	716 630	1 333 056	2 205 503	3 172 109	4 395 561	6 137 151
EU 15	8 765 251	12 796 896	17 243 388	22 588 685	28 847 836	37 732 441
EU10			101 033	943 433	1 293 687	2 332 230
EU25	8 765 251	12 796 896	17 344 421	23 532 118	30 141 523	40 064 671

	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	January 2003 - January 2004			January 2004 - January 2005		
BE	367 372	42%	1 006	375 020	30%	1 027
CZ				112 200	200%	307
DK	229 717	51%	629	289 676	43%	794
DE	1 423 027	44%	3 899	2 237 702	48%	6 131
EE				80 102	137%	219
EL	8 317	492%	23	41 442	414%	114
ES	923 399	71%	2 530	1 224 537	55%	3 355
FR	2 000 366	121%	5 480	3 136 595	86%	8 593
IE	26 663	361%	73	104 066	306%	285
IT	1 425 920	146%	3 907	2 299 293	96%	6 299
CY				8 904	88%	24
LV						
LT				64 071	99%	176
LU	8 487	114%	23	21 077	132%	58
HU				178 513	95%	489
MT						
NL	694 183	57%	1 902	1 176 517	62%	3 223
AT	160 800	36%	441	215 075	35%	589
PL				749 278	150%	2 053
PT	240 141	92%	658	363 629	73%	996
SI				57 633	95%	158
SK				43 594	527%	119
FI	177 744	66%	487	332 485	74%	911
SE	266 600	36%	730	361 600	36%	991
UK	1 839 053	138%	5 039	2 965 042	93%	8 123
EU 15	9 791 789	77%	26 827	15 143 756	67%	41 490
EU10				1 388 797	147%	3 805
EU25	10 735 222	84%	29 412	16 532 553	70%	45 295

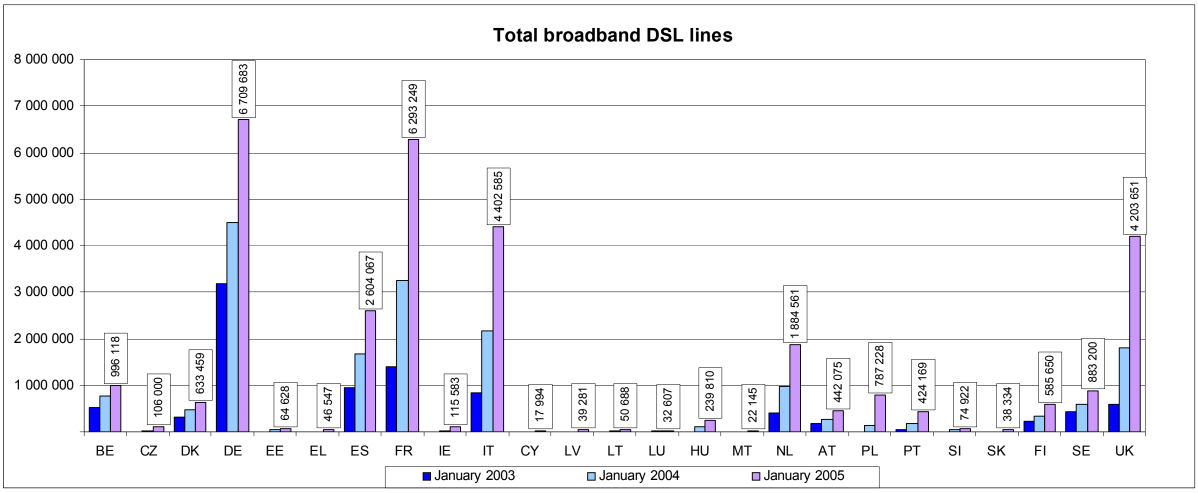
Broadband access in the EU as at 1 January 2005

Total DSL retail lines in EU25



Total broadband DSL lines		% variation since July 2002	Variation January 04-January 05	
July 2002	5 989 549		%	81.76%
October 2002	7 073 147	18%	New lines	14 258 273
January 2003	9 117 731	52%	Lines/day	39064
July 2003	12 637 655	111%		
October 2003	14 386 110	140%		
January 2004	17 439 961	191%	**Variation January 03-January 04**	
July 2004	23 108 837	286%	%	91.28%
October 2004	26 281 727	339%	New lines	8 322 230
January 2005	31 698 234	429%	Lines/day	22801

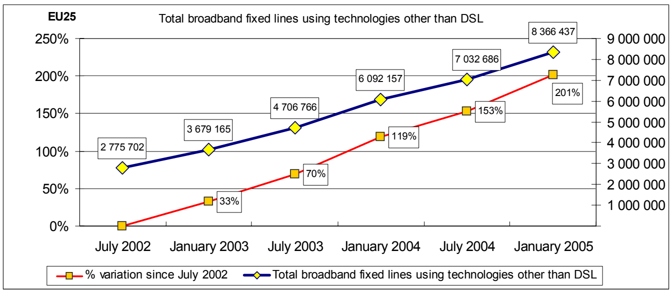
Variation lines/day: 71.3%



	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	401 453	523 619	627 970	765 183	889 294	996 118
CZ				21 000	36 000	106 000
DK	234 602	307 812	389 805	473 193	562 112	633 459
DE	2 570 011	3 185 015	3 884 020	4 498 086	5 286 141	6 709 683
EE			37 558	37 558	50 906	64 628
EL	93	93	359	8 588	22 937	46 547
ES	643 625	957 204	1 297 563	1 676 466	2 086 172	2 604 067
FR	526 413	1 406 769	2 099 933	3 262 800	4 490 487	6 293 249
IE	990	3 287	5 369	24 400	57 445	115 583
IT	487 876	835 525	1 387 658	2 158 458	3 223 188	4 402 585
CY				10 033	14 490	17 994
LV					26 815	39 281
LT			15 444	26 438	34 074	50 688
LU		6 858	8 960	13 860	22 128	32 607
HU				117 369	165 980	239 810
MT					11 426	22 145
NL	216 704	413 861	679 508	978 044	1 374 129	1 884 561
AT	138 640	179 600	224 650	279 600	355 725	442 075
PL				132 972	195 752	787 228
PT	5 542	52 810	113 040	184 860	293 435	424 169
SI				38 330	53 840	74 922
SK				4 210	17 100	38 334
FI	112 300	215 200	271 000	328 704	400 000	585 650
SE	357 200	439 800	495 300	595 200	686 200	883 200
UK	294 100	590 278	1 099 518	1 804 609	2 753 061	4 203 651
EU 15	5 989 549	9 117 731	12 584 653	17 052 051	22 502 454	30 257 204
EU10			53 002	387 910	606 383	1 441 030
EU25	5 989 549	9 117 731	12 637 655	17 439 961	23 108 837	31 698 234

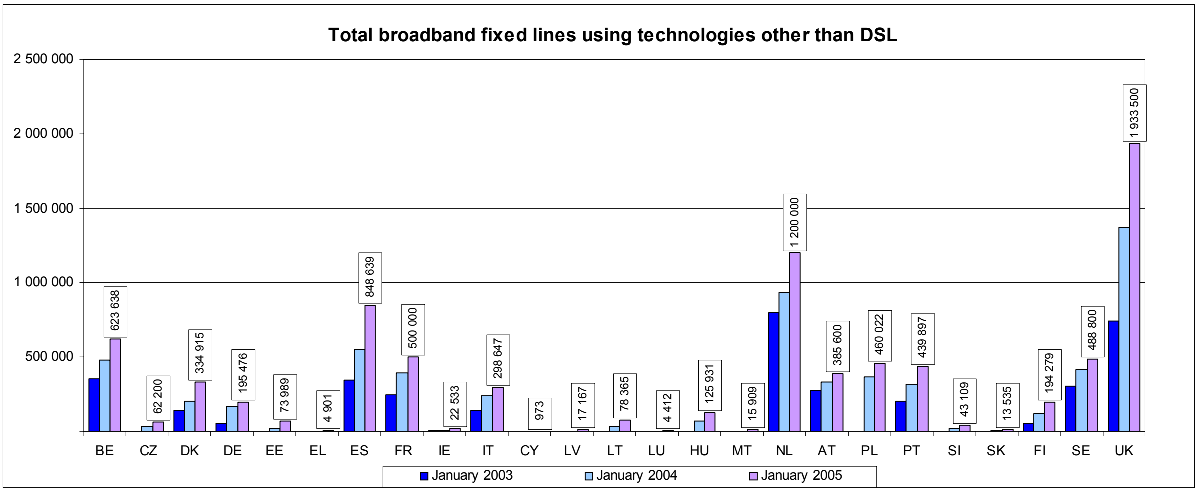
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	January 2003 - January 2004			January 2004 - January 2005		
BE	241 564	46%	662	230 935	30%	633
CZ				85 000	405%	233
DK	165 381	54%	453	160 266	34%	439
DE	1 313 071	41%	3 597	2 211 597	49%	6 059
EE				27 070	72%	74
EL	8 495	9134%	23	37 959	442%	104
ES	719 262	75%	1 971	927 601	55%	2 541
FR	1 856 031	132%	5 085	3 030 449	93%	8 303
IE	21 113	642%	58	91 183	374%	250
IT	1 322 933	158%	3 624	2 244 127	104%	6 148
CY				7 961	79%	22
LV						
LT				24 250	92%	66
LU	7 002	102%	19	18 747	135%	51
HU				122 441	104%	335
MT						
NL	564 183	136%	1 546	906 517	93%	2 484
AT	100 000	56%	274	162 475	58%	445
PL				654 256	492%	1 792
PT	132 050	250%	362	239 309	129%	656
SI				36 592	95%	100
SK				34 124	811%	93
FI	113 504	53%	311	256 946	78%	704
SE	155 400	35%	426	288 000	48%	789
UK	1 214 331	206%	3 327	2 399 042	133%	6 573
EU 15	7 934 320	87%	21 738	13 205 153	77%	36 179
EU10				1 053 120	271%	2 885
EU25	8 322 230	91%	22 801	14 258 273	82%	39 064

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



Total broadband lines using technologies other than DSL		% variation since July 2002	Variation January 04-January 05	
July 2002	2 775 702		%	37.33%
October 2002	3 224 999	16%	New lines	2 274 280
January 2003	3 679 165	33%	Lines/day	6231
July 2003	4 706 766	70%		
October 2003	5 008 804	80%		
January 2004	6 092 157	119%	**Variation January 03-January 04**	
July 2004	7 032 686	153%	%	65.59%
October 2004	7 486 520	170%	New lines	2 412 992
January 2005	8 366 437	201%	Lines/day	6611

Variation lines/day: -5.7%

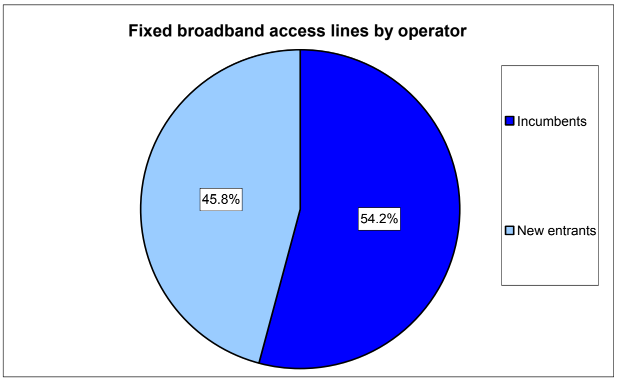


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	290 517	353 745	417 897	479 553	555 379	623 638
CZ				35 000	40 000	62 200
DK	126 057	141 169	168 795	205 505	277 038	334 915
DE	41 000	59 415	87 262	169 371	129 106	195 476
EE			20 957	20 957	51 865	73 989
EL	357	1 596	1 787	1 418	2 994	4 901
ES	170 712	347 566	478 855	551 703	681 455	848 639
FR	209 531	249 519	313 707	393 854	425 000	500 000
IE	354	4 100	4 100	9 650	10 085	22 533
IT	61 840	140 494	198 536	243 481	280 309	298 647
CY				30	30	973
LV					7 089	17 167
LT			27 074	38 544	54 205	78 365
LU		597	1 322	2 082	3 206	4 412
HU				69 859	91 036	125 931
MT					2 312	15 909
NL	800 000	800 000	900 000	930 000	998 400	1 200 000
AT	236 000	272 200	302 400	333 000	352 000	385 600
PL				365 000	413 683	460 022
PT	145 304	207 486	262 339	315 577	370 610	439 897
SI				22 068	22 499	43 109
SK				4 065	4 585	13 535
FI	40 000	54 500	63 950	118 740	172 100	194 279
SE	231 500	304 000	351 800	415 200	445 200	488 800
UK	422 530	742 778	1 105 985	1 367 500	1 642 500	1 933 500
EU 15	2 775 702	3 679 165	4 658 735	5 536 634	6 345 382	7 475 237
EU10			48 031	555 523	687 304	891 200
EU25	2 775 702	3 679 165	4 706 766	6 092 157	7 032 686	8 366 437

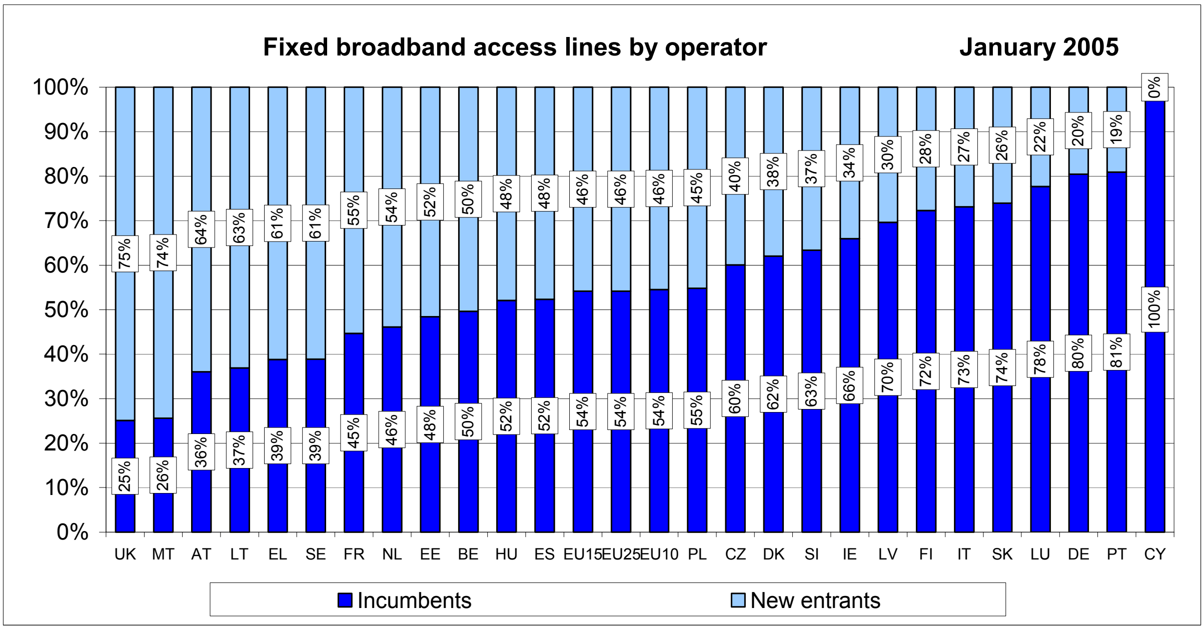
	Difference	Variation	Lines/Day	Difference	Variation	Lines/Day
	January 2003 - January 2004			January 2004 - January 2005		
BE	125 808	36%	345	144 085	30%	395
CZ				27 200	78%	75
DK	64 336	46%	176	129 410	63%	355
DE	109 956	185%	301	26 105	15%	72
EE				53 032	253%	145
EL	- 178	-11%		3 483	246%	10
ES	204 137	59%	559	296 936	54%	814
FR	144 335	58%	395	106 146	27%	291
IE	5 550	135%	15	12 883	134%	35
IT	102 987	73%	282	55 166	23%	151
CY				943	3143%	3
LV						
LT				39 821	103%	109
LU	1 485	249%	4	2 330	112%	6
HU				56 072	80%	154
MT						
NL	130 000	16%	356	270 000	29%	740
AT	60 800	22%	167	52 600	16%	144
PL				95 022	26%	260
PT	108 091	52%	296	124 320	39%	341
SI				21 041	95%	58
SK				9 470	233%	26
FI	64 240	118%	176	75 539	64%	207
SE	111 200	37%	305	73 600	18%	202
UK	624 722	84%	1 712	566 000	41%	1 551
EU 15	1 857 469	50%	5 089	1 938 603	35%	5 311
EU10				335 677	60%	920
EU25	2 412 992	66%	6 611	2 274 280	37%	6 231

Broadband access in the EU as at 1 January 2005

Fixed broadband access lines by operator in EU25



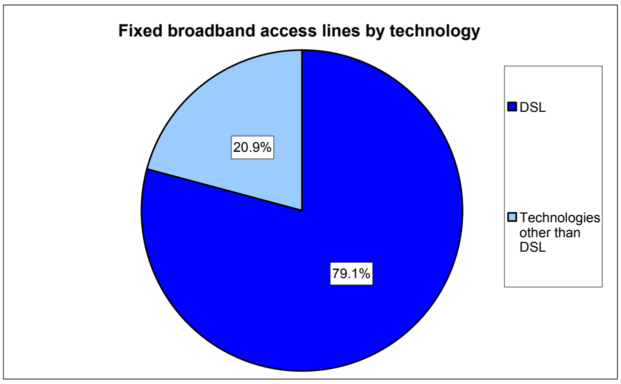
	Fixed broadband access lines by operator	
	Incumbents	New entrants
January 2005	54.17%	45.83%



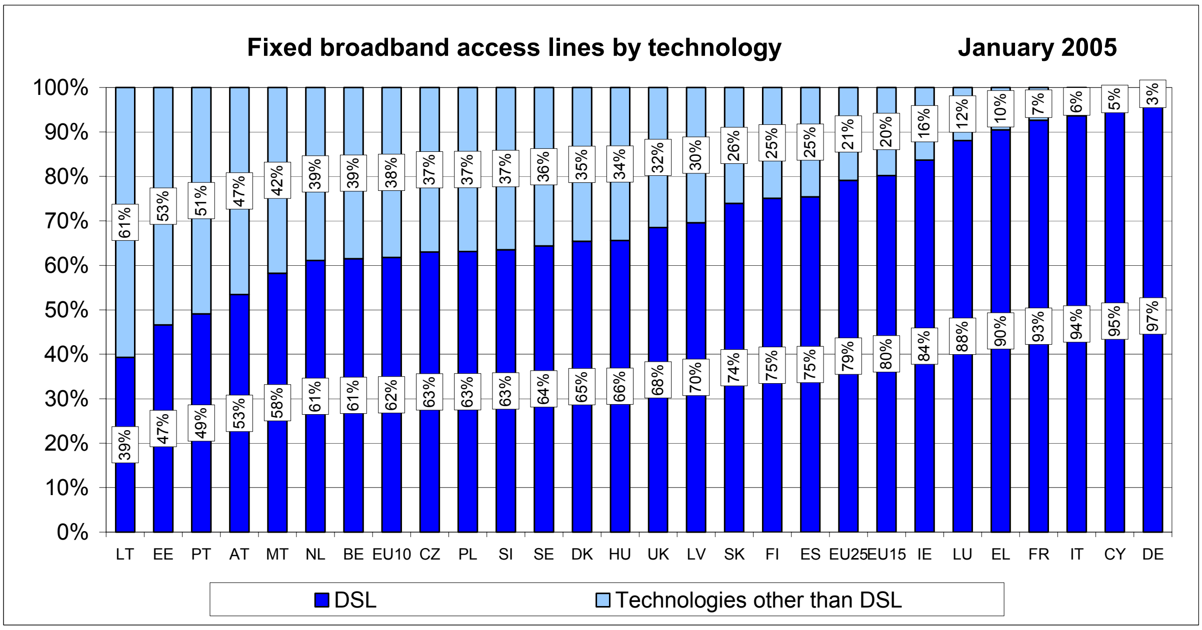
	Incumbents	New entrants
BE	50%	50%
CZ	60%	40%
DK	62%	38%
DE	80%	20%
EE	48%	52%
EL	39%	61%
ES	52%	48%
FR	45%	55%
IE	66%	34%
IT	73%	27%
CY	100%	0%
LV	70%	30%
LT	37%	63%
LU	78%	22%
HU	52%	48%
MT	26%	74%
NL	46%	54%
AT	36%	64%
PL	55%	45%
PT	81%	19%
SI	63%	37%
SK	74%	26%
FI	72%	28%
SE	39%	61%
UK	25%	75%
EU15	54%	46%
EU10	54%	46%
EU25	54%	46%

Broadband access in the EU as at 1 January 2005

Fixed broadband access lines by technology in EU25



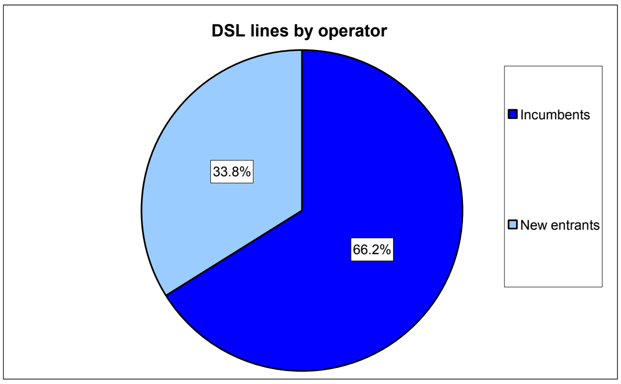
	Fixed broadband access lines by technology	
	DSL	Technologies other than DSL
January 2005	79.12%	20.88%



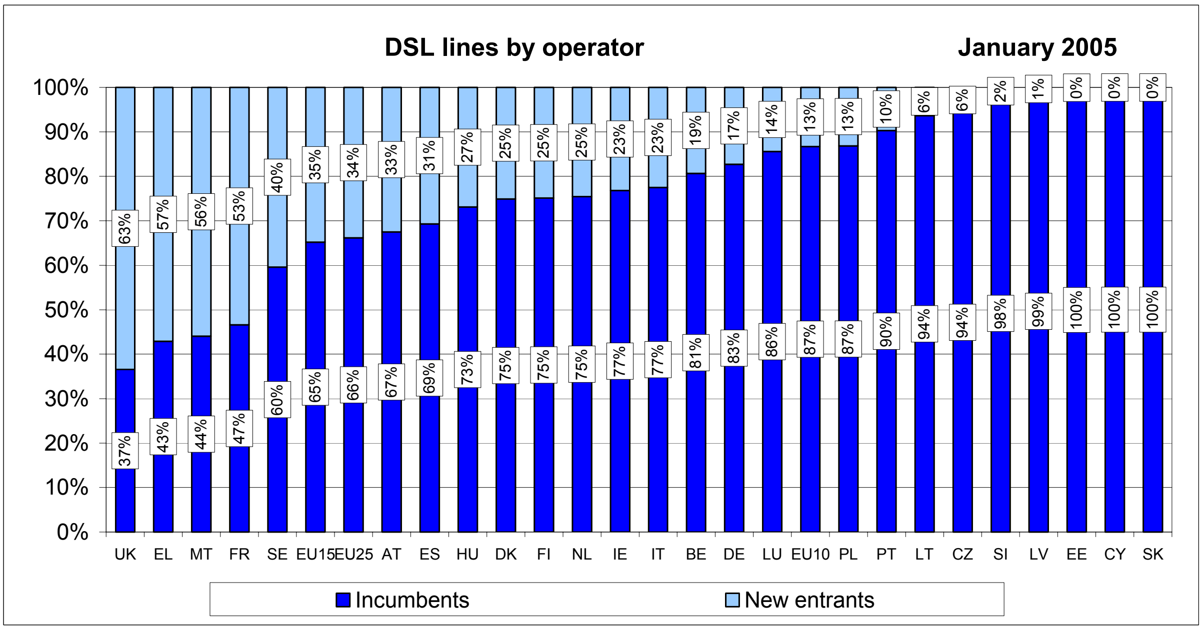
	DSL	Technologies other than DSL
BE	61%	39%
CZ	63%	37%
DK	65%	35%
DE	97%	3%
EE	47%	53%
EL	90%	10%
ES	75%	25%
FR	93%	7%
IE	84%	16%
IT	94%	6%
CY	95%	5%
LV	70%	30%
LT	39%	61%
LU	88%	12%
HU	66%	34%
MT	58%	42%
NL	61%	39%
AT	53%	47%
PL	63%	37%
PT	49%	51%
SI	63%	37%
SK	74%	26%
FI	75%	25%
SE	64%	36%
UK	68%	32%
EU15	80%	20%
EU10	62%	38%
EU25	79%	21%

Broadband access in the EU as at 1 January 2005

DSL access lines by operator in EU25

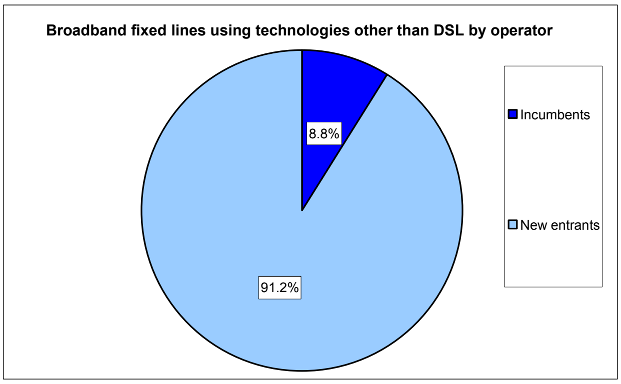


	DSL lines by operator	
	Incumbents	New entrants
January 2005	66.16%	33.84%

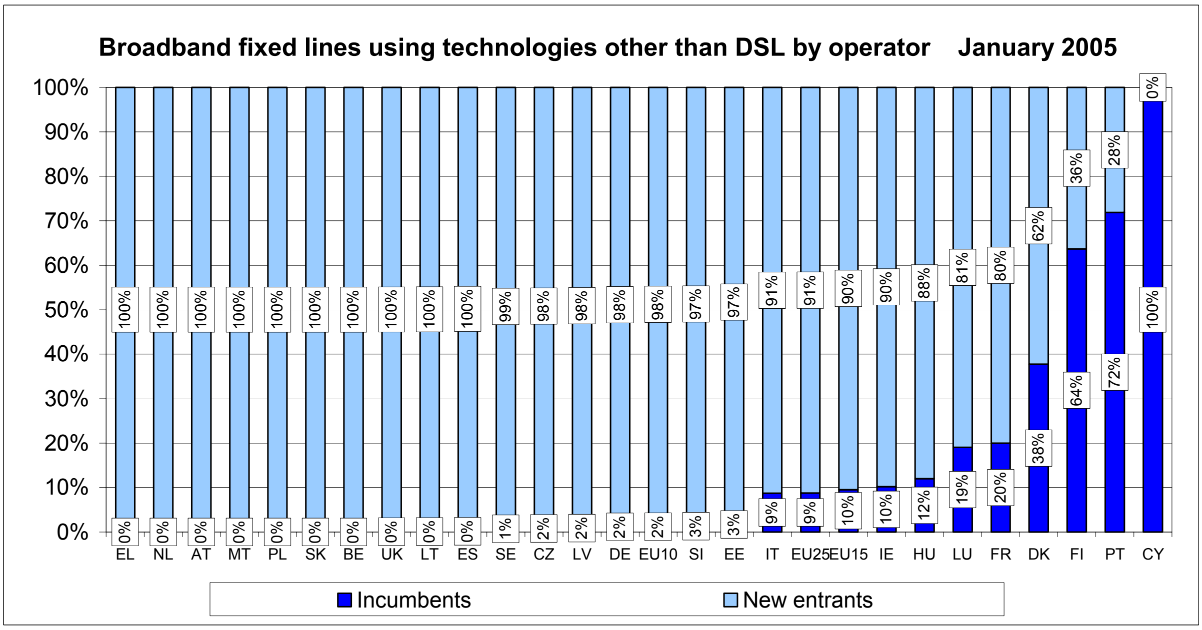


	Incumbents	New entrants
BE	81%	19%
CZ	94%	6%
DK	75%	25%
DE	83%	17%
EE	100%	0%
EL	43%	57%
ES	69%	31%
FR	47%	53%
IE	77%	23%
IT	77%	23%
CY	100%	0%
LV	99%	1%
LT	94%	6%
LU	86%	14%
HU	73%	27%
MT	44%	56%
NL	75%	25%
AT	67%	33%
PL	87%	13%
PT	90%	10%
SI	98%	2%
SK	100%	0%
FI	75%	25%
SE	60%	40%
UK	37%	63%
EU15	65%	35%
EU10	87%	13%
EU25	66%	34%

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

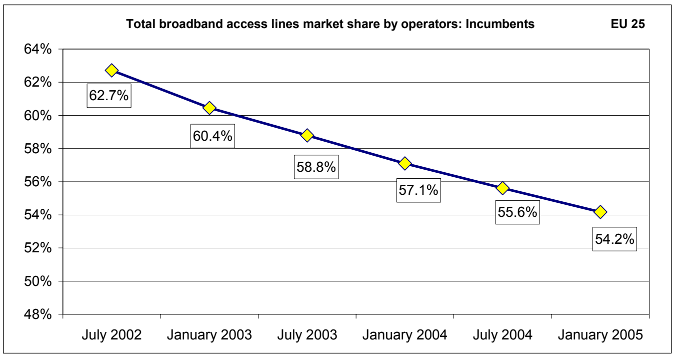


	Broadband fixed lines using technologies other than DSL by operator	
	Incumbents	New entrants
January 2005	8.77%	91.23%

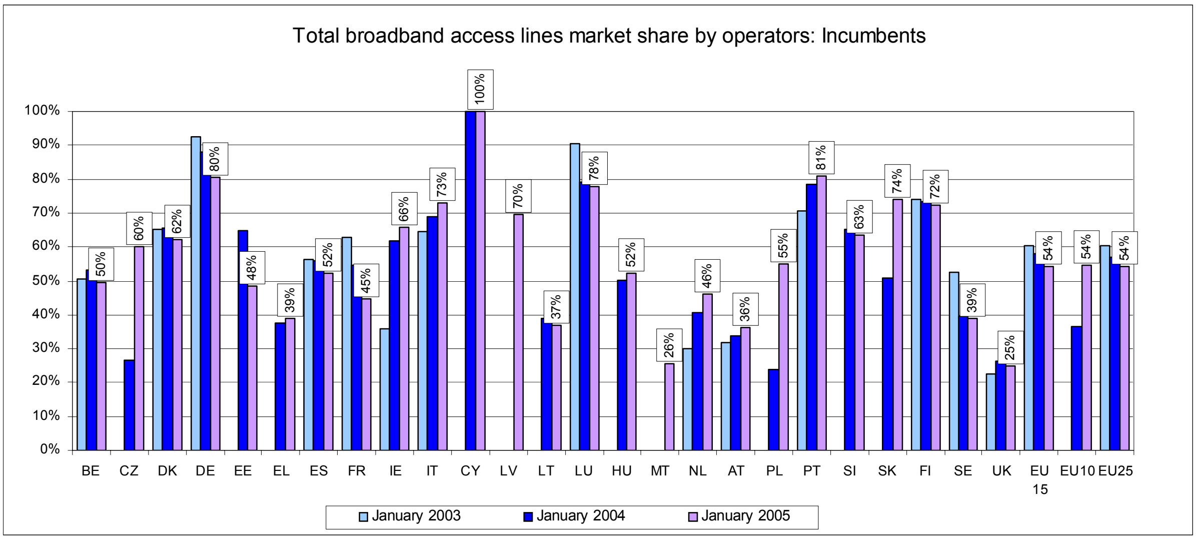


	Incumbents	New entrants
BE	0%	100%
CZ	2%	98%
DK	38%	62%
DE	2%	98%
EE	3%	97%
EL	0%	100%
ES	0%	100%
FR	20%	80%
IE	10%	90%
IT	9%	91%
CY	100%	0%
LV	2%	98%
LT	0%	100%
LU	19%	81%
HU	12%	88%
MT	0%	100%
NL	0%	100%
AT	0%	100%
PL	0%	100%
PT	72%	28%
SI	3%	97%
SK	0%	100%
FI	64%	36%
SE	1%	99%
UK	0%	100%
EU15	10%	90%
EU10	2%	98%
EU25	9%	91%

Trends in fixed broadband access lines by operator in EU25



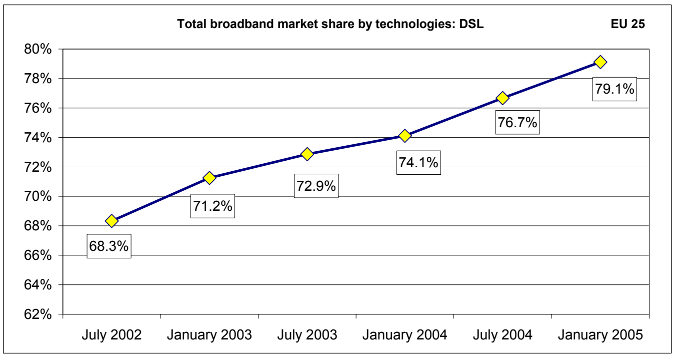
Total broadband access lines market share by operators: Incumbents		Variation since July 2002	Variation in the reporting period
July 2002	62.7%		
October 2002	60.4%	-2.34%	-2.3%
January 2003	60.4%	-2.27%	0.1%
July 2003	58.8%	-3.92%	-1.7%
October 2003	58.0%	-4.68%	-0.8%
January 2004	57.1%	-5.62%	-0.9%
July 2004	55.6%	-7.11%	-1.5%
October 2004	55.3%	-7.38%	-0.3%
January 2005	54.2%	-8.55%	-1.2%



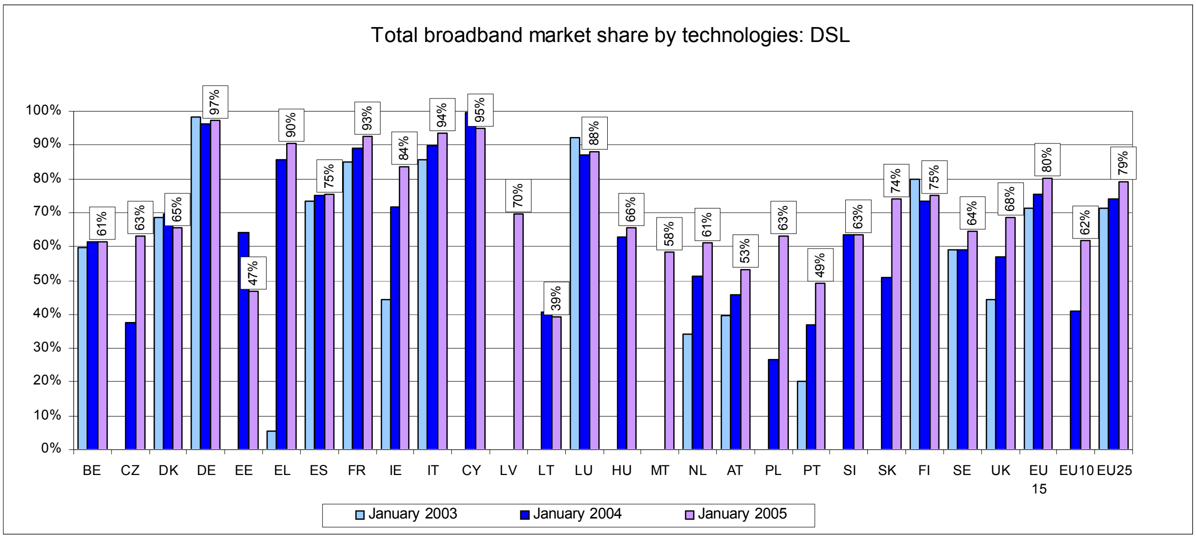
	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	48.7%	50.5%	51.1%	53.2%	50.7%	49.6%
CZ				26.8%	39.5%	60.0%
DK	63.9%	65.2%	67.3%	65.5%	64.3%	62.0%
DE	93.9%	92.6%	90.8%	88.0%	86.9%	80.4%
EE				65.0%	50.5%	48.4%
EL				37.5%	39.5%	38.8%
ES	61.4%	56.3%	55.5%	55.8%	55.5%	52.3%
FR	72.0%	62.7%	57.5%	54.8%	48.0%	44.7%
IE	72.8%	35.8%	44.9%	61.7%	70.0%	65.9%
IT	76.5%	64.5%	66.7%	68.9%	70.7%	73.1%
CY				100.0%	100.0%	100.0%
LV					80.9%	69.6%
LT				38.8%	36.2%	36.9%
LU		90.5%	83.7%	79.3%	73.5%	77.7%
HU				50.2%	51.3%	52.1%
MT					32.8%	25.6%
NL	19.3%	29.9%	36.1%	40.7%	44.4%	46.1%
AT	30.4%	31.7%	33.1%	33.9%	35.2%	36.1%
PL				23.8%	29.8%	54.8%
PT	66.5%	70.7%	74.1%	78.5%	79.9%	80.9%
SI				65.2%	71.0%	63.3%
SK				50.9%	45.7%	73.9%
FI	72.9%	74.0%	69.9%	73.5%	72.0%	72.3%
SE	54.7%	52.7%	43.1%	39.5%	38.8%	38.8%
UK	25.5%	22.6%	25.6%	26.4%	25.4%	25.1%
EU15	62.7%	60.4%	58.8%	58.0%	56.2%	54.2%
EU10				36.5%	41.6%	54.5%
EU25	62.7%	60.4%	58.8%	57.1%	55.6%	54.2%

	Variation	
	January 04-05	January 03-05
BE	-4%	-1%
CZ	33%	
DK	-3%	-3%
DE	-8%	-12%
EE	-17%	
EL	1%	39%
ES	-4%	-4%
FR	-10%	-18%
IE	4%	30%
IT	4%	9%
CY		
LV		
LT	-2%	
LU	-2%	-13%
HU	2%	
MT		
NL	5%	16%
AT	2%	4%
PL	31%	
PT	2%	10%
SI	-2%	
SK	23%	
FI	-1%	-2%
SE	-1%	-14%
UK	-1%	3%
EU15	-4%	-6%
EU10	18%	
EU25	-3%	

Trends in fixed broadband access lines by technology in EU25



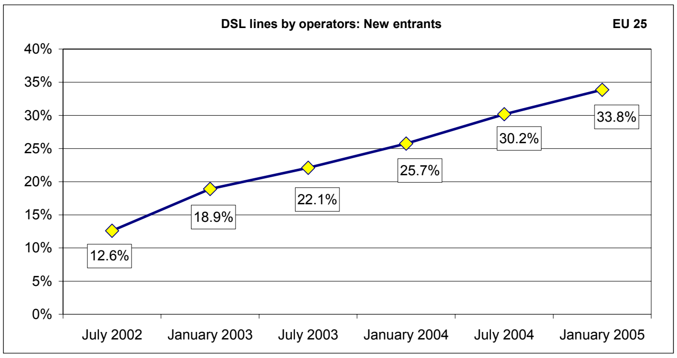
DSL lines as % of all BB lines		Variation since July 2002	Variation in the reporting period
July 2002	68.3%		
October 2002	68.7%	0.35%	0.4%
January 2003	71.2%	2.92%	2.6%
July 2003	72.9%	4.53%	1.6%
October 2003	74.2%	5.84%	1.3%
January 2004	74.1%	5.78%	-0.1%
July 2004	76.7%	8.33%	2.6%
October 2004	77.8%	9.50%	1.2%
January 2005	79.1%	10.78%	1.3%



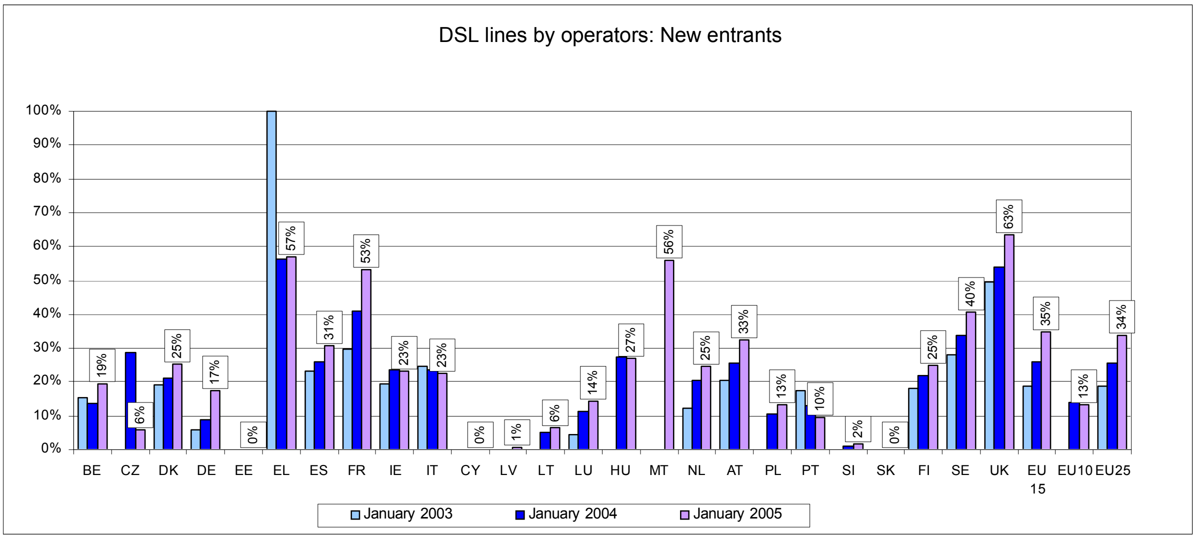
	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	58.0%	59.7%	60.0%	61.5%	61.6%	61.5%
CZ				37.5%	47.4%	63.0%
DK	65.0%	68.6%	69.8%	69.7%	67.0%	65.4%
DE	98.4%	98.2%	97.8%	96.4%	97.6%	97.2%
EE				64.2%	49.5%	46.6%
EL	20.7%	5.5%	16.7%	85.8%	88.5%	90.5%
ES	79.0%	73.4%	73.0%	75.2%	75.4%	75.4%
FR	71.5%	84.9%	87.0%	89.2%	91.4%	92.6%
IE	73.7%	44.5%	56.7%	71.7%	85.1%	83.7%
IT	88.8%	85.6%	87.5%	89.9%	92.0%	93.6%
CY				99.7%	99.8%	94.9%
LV					79.1%	69.6%
LT				40.7%	38.6%	39.3%
LU		92.0%	87.1%	86.9%	87.3%	88.1%
HU				62.7%	64.6%	65.6%
MT					83.2%	58.2%
NL	21.3%	34.1%	43.0%	51.3%	57.9%	61.1%
AT	37.0%	39.8%	42.6%	45.6%	50.3%	53.4%
PL				26.7%	32.1%	63.1%
PT	3.7%	20.3%	30.1%	36.9%	44.2%	49.1%
SI				63.5%	70.5%	63.5%
SK				50.9%	78.9%	73.9%
FI	73.7%	79.8%	80.9%	73.5%	69.9%	75.1%
SE	60.7%	59.1%	58.5%	58.9%	60.7%	64.4%
UK	41.0%	44.3%	49.9%	56.9%	62.6%	68.5%
EU15	68.3%	71.2%	73.0%	75.5%	78.0%	80.2%
EU10				41.1%	46.9%	61.8%
EU25	68.3%	71.2%	72.9%	74.1%	76.7%	79.1%

	Variation	
	January 04-05	January 03-05
BE	0%	2%
CZ	26%	
DK	-4%	-3%
DE	1%	-1%
EE	-18%	
EL	5%	85%
ES	0%	2%
FR	3%	8%
IE	12%	39%
IT	4%	8%
CY	-5%	
LV		
LT	-1%	
LU	1%	-4%
HU	3%	
MT		
NL	10%	27%
AT	8%	14%
PL	36%	
PT	12%	29%
SI	0%	
SK	23%	
FI	2%	-5%
SE	5%	5%
UK	12%	24%
EU15	5%	9%
EU10	21%	
EU25	5%	

Trends in DSL access lines by operator in EU25



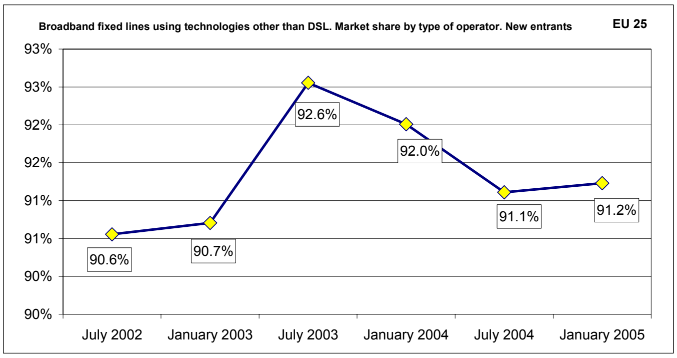
DSL lines by operator: New entrants		Variation since July 2002	Variation in the reporting period
July 2002	12.6%		
October 2002	16.3%	3.67%	3.7%
January 2003	18.9%	6.32%	2.6%
July 2003	22.1%	9.49%	3.2%
October 2003	24.4%	11.79%	2.3%
January 2004	25.7%	13.15%	1.4%
July 2004	30.2%	17.58%	4.4%
October 2004	31.4%	18.83%	1.2%
January 2005	33.8%	21.25%	2.4%



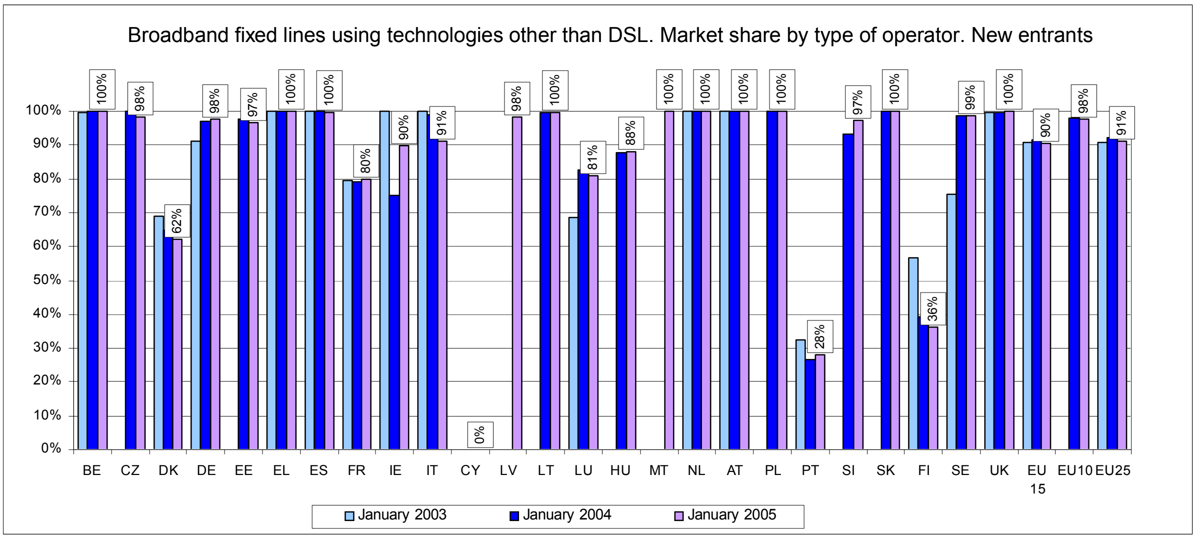
	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	16.2%	15.5%	15.0%	13.5%	17.7%	19.3%
CZ				28.6%	16.7%	5.7%
DK	20.4%	19.1%	17.5%	21.2%	24.0%	25.1%
DE	4.6%	5.8%	7.3%	8.9%	11.1%	17.3%
EE				0.1%	0.2%	0.1%
EL	100.0%	100.0%	100.0%	56.3%	55.3%	57.1%
ES	22.3%	23.3%	24.1%	25.8%	26.4%	30.7%
FR	8.4%	29.8%	37.1%	41.1%	49.4%	53.4%
IE	1.3%	19.5%	20.9%	23.7%	21.7%	23.2%
IT	13.9%	24.6%	23.8%	23.5%	23.8%	22.5%
CY				0	0	0
LV						0.7%
LT				5.1%	6.6%	6.4%
LU		4.3%	7.3%	11.4%	18.2%	14.4%
HU				27.2%	27.0%	26.9%
MT					60.5%	56.0%
NL	9.7%	12.3%	16.2%	20.6%	23.4%	24.5%
AT	17.8%	20.3%	22.4%	25.7%	29.9%	32.5%
PL				10.7%	7.3%	13.2%
PT	3.8%	17.3%	19.7%	13.1%	11.3%	9.7%
SI				1.1%	1.7%	1.7%
SK				0	0	0
FI	15.4%	18.2%	24.0%	22.0%	23.4%	24.9%
SE	26.1%	27.9%	27.3%	33.8%	36.8%	40.4%
UK	38.1%	49.3%	48.8%	53.8%	59.5%	63.4%
EU15	12.6%	18.9%	22.2%	26.0%	30.6%	34.8%
EU10				13.9%	13.6%	13.3%
EU25	12.6%	18.9%	22.1%	25.7%	30.2%	33.8%

	Variation	
	January 04-05	January 03-05
BE	6%	4%
CZ	-23%	
DK	4%	6%
DE	8%	11%
EE	0%	
EL	1%	-43%
ES	5%	7%
FR	12%	24%
IE	0%	4%
IT	-1%	-2%
CY		
LV		
LT	1%	
LU	3%	10%
HU	0%	
MT		
NL	4%	12%
AT	7%	12%
PL	2%	
PT	-3%	-8%
SI	1%	
SK		
FI	3%	7%
SE	7%	13%
UK	10%	14%
EU15	9%	16%
EU10	-1%	
EU25	8%	

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



Broadband lines using technologies other than DSL: New entrants		Variation since July 2002	Variation in the reporting period
July 2002	90.6%		
October 2002	90.9%	0.30%	0.3%
January 2003	90.7%	0.15%	-0.2%
July 2003	92.6%	2.00%	1.8%
October 2003	92.4%	1.89%	-0.1%
January 2004	92.0%	1.45%	-0.4%
July 2004	91.1%	0.55%	-0.9%
October 2004	91.1%	0.59%	0.0%
January 2005	91.2%	0.68%	0.1%

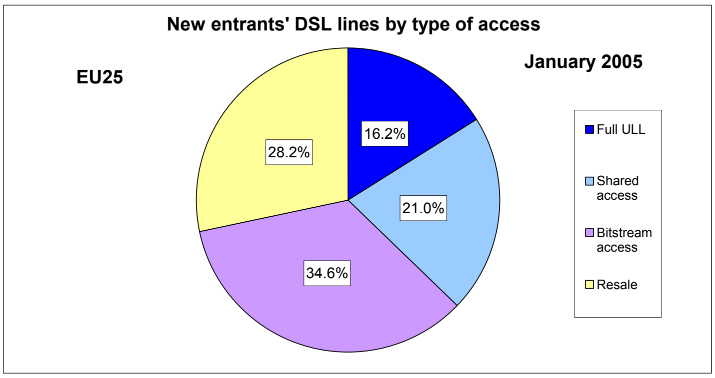


	July 2002	January 2003	July 2003	January 2004	July 2004	January 2005
BE	99.7%	99.7%	100.0%	100.0%	100.0%	100.0%
CZ				100.0%	100.0%	98.4%
DK	65.3%	69.0%	67.8%	65.0%	59.6%	62.3%
DE	100.0%	91.2%	94.0%	96.9%	96.2%	97.8%
EE				97.7%	97.9%	96.6%
EL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
ES	100.0%	100.0%	100.0%	99.9%	99.9%	99.7%
FR	77.3%	79.6%	78.7%	79.3%	79.3%	80.0%
IE	99.7%	100.0%	100.0%	75.1%	77.2%	89.8%
IT	99.5%	100.0%	99.9%	99.1%	92.8%	91.3%
CY						
LV					91.4%	98.2%
LT				99.7%	99.7%	99.8%
LU	#DIV/0!	68.5%	77.1%	82.5%	83.5%	80.9%
HU				87.7%	88.4%	88.0%
MT					100.0%	100.0%
NL	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%
PL				100.0%	100.0%	100.0%
PT	34.6%	32.4%	28.5%	26.5%	27.1%	28.1%
SI				93.3%	94.2%	97.4%
SK				100.0%	100.0%	100.0%
FI	60.0%	56.8%	56.1%	39.1%	38.9%	36.3%
SE	74.9%	75.3%	98.6%	98.8%	98.9%	98.6%
UK	99.9%	99.8%	99.8%	99.8%	99.8%	99.9%
EU15	90.6%	90.7%	92.5%	91.4%	90.4%	90.5%
EU10				98.1%	98.0%	97.6%
EU25	90.6%	90.7%	92.6%	92.0%	91.1%	91.2%

	Variation	
	January 04-05	January 03-05
BE	0	0
CZ	-2%	
DK	-3%	-7%
DE	1%	7%
EE	-1%	
EL	0	0
ES	0%	0%
FR	1%	0%
IE	15%	-10%
IT	-8%	-9%
CY		
LV		
LT	0%	
LU	-2%	12%
HU	0	
MT		
NL	0	0
AT	0	0
PL		
PT	2%	-4%
SI	4%	
SK		
FI	-3%	-20%
SE	0%	23%
UK	0%	0%
EU15	-1%	0
EU10	0%	
EU25	-1%	

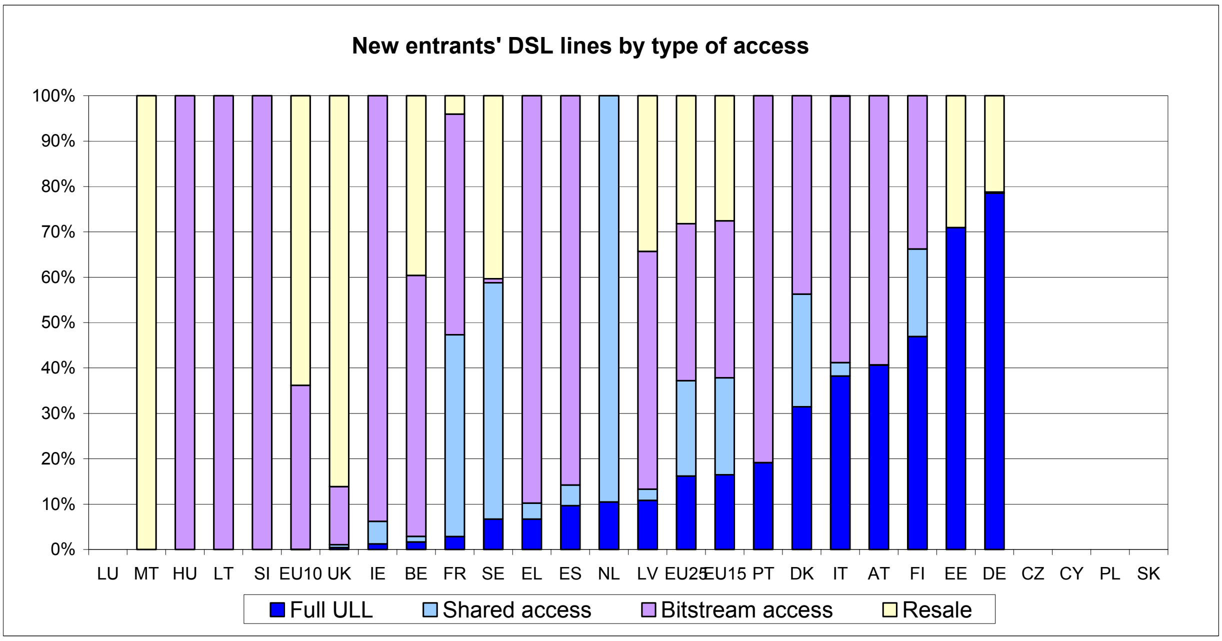
Broadband access in the EU as at 1 January 2005

New entrants DSL lines by access type in EU 25



January 2005	
Full ULL	16.2%
Shared access	21.0%
Bitstream access	34.6%
Resale	28.2%

Total LLU	37.2%



	Full ULL	Shared access	Bitstream access	Resale
BE	1.7%	1.3%	57.5%	39.6%
CZ			0%	100%
DK	31%	25%	44%	0%
DE	79%	0%	0%	21%
EE	71%	0%	0%	29%
EL	7%	3%	90%	0%
ES	10%	5%	86%	0%
FR	3%	45%	49%	4%
IE	1%	5%	94%	0%
IT	38%	3%	59%	0%
CY				
LV	11%	2%	52%	34%
LT	0%	0%	100%	0%
LU	0%	0%	0%	0%
HU	0%	0%	100%	0%
MT	0%	0%	0%	100%
NL	10%	90%		0%
AT	41%	0%	59%	0%
PL				
PT	19%	0%	81%	0%
SI	0%	0%	100%	0%
SK				
FI	47%	19%	34%	0%
SE	7%	52%	1%	40%
UK	0%	1%	13%	86%
EU15	16%	21%	35%	28%
EU10	0%	0%	36%	64%
EU25	16%	21%	35%	28%

Data on national population used in this report

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

(e) Estimated value
(p) Provisional
Source: Eurostat