European Broadband Markets

A service from Point Topic

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Service description

Introduction

Point Topic's European Broadband Markets service provides users with a consistent and comprehensive source of data on fixed broadband markets throughout the European Union and associated countries. It enables users to assess the areas they should be targeting for their broadband strategy, whether for investment, marketing or public intervention.

Point Topic has developed the service from over 15 years of experience of researching and publishing international data about broadband. In 2006 Point Topic began detailed mapping of broadband take-up and coverage in the UK. Starting in 2010 it began to extend this approach to other countries.

A 2010-11 project for the European Space Agency produced the first-ever mapping of broadband coverage across Europe at the provincial or "NUTS 3" level. Point Topic then used its work for ESA as the basis of two projects for the European Commission, Broadband Coverage in Europe 2011 and 2012, which produced more detailed data by technology for each province. In 2014 Point Topic started to supply datasets based on the same methodologies to commercial clients.

Point Topic has also produced more detailed datasets and maps, for example at postcode level, for other countries, including Ireland, parts of Germany, Turkey, Poland and Slovakia as well as the UK.

The datasets

The European Broadband Market datasets provide a unique picture of the current status and future of broadband in Europe. They show both the coverage and the take-up of fixed broadband services, with the key drivers of broadband demand, and its forecast

future growth in both coverage and take-up. Current and forecast coverage of LTE is also included. The datasets comprise five different spreadsheets, provided as Excel files. Each dataset covers all 28 countries of the European Union, plus Iceland, Norway, Switzerland and Turkey as listed under the Country summaries heading.

Not least, the spreadsheets supply this data for a total of 1,437 different provinces (NUTS3 areas) within the 32 countries covered. For each province they include about 150 different data fields – over 200,000 data points in total - which combine to create the most comprehensive view available of this vital technology for a whole continent.

This edition of the datasets provides a view of broadband coverage, take-up and drivers of demand in Europe as at the end of 2014, with forecasts to 2020. These datasets, like the country summaries described below, are available off-the-shelf, for immediate delivery.

Country summaries

The summaries focus on the size of the broadband market in each country, in terms of the number of subscribers, and how that is distributed between the main players and the technologies they use. The summaries cover each of the 32 countries included in the datasets.

Countries in depth

Point Topic also provides more in-depth datasets and reports on individual countries. According to user needs, these can provide information on coverage by each fixed broadband technology and major operator, mapping to more granular geographies, such as post sectors, and a report covering the broadband market by technology, regulation and the national broadband plan for the country. The delivery time for a country in-depth depends on the country and the level of research needed.

Dataset deliverables

Samples showing the scope and content of the dataset deliverables are available on request from Point Topic.

Current coverage and demand

Provides key geographic, demographic, broadband coverage and demand indicator data for 1,437 provinces or "NUTS3" areas in the 28 member states of the European Union plus Iceland, Norway, Switzerland and Turkey.

See sample spreadsheet <MBES01 European Broadband Market datasets SAMPLE.xlsx>

Forecasts for coverage to 2020

Forecasts to 2020 from base year 2013 for Standard, 2Mbps and NGA broadband coverage for NUTS3 areas (roughly corresponding to provinces) of the 28 member states of the EU plus Iceland, Norway, Switzerland and Turkey

See sample spreadsheet <MBES02 Forecasts for Coverage to 2020 SAMPLE.xlsx>

LTE current coverage and forecast to 2020

Provides current figures and forecasts for the coverage of LTE services for 1,437 provinces or "NUTS3" areas, and for countries as a whole, for the 28 member states of the European Union plus Iceland, Norway, Switzerland and Turkey.

See sample spreadsheet <MBES03 LTE Current Coverage and Forecast to 2020 SAMPLE.xlsx>

Business current coverage and forecast to 2020

Provides geographic, demand indicator and both current and forecast coverage data for business broadband for 1,437 provinces or "NUTS3" areas in the 28 member states of the European Union plus Iceland, Norway, Switzerland and Turkey.

See sample spreadsheet < MBES04 Business Current Coverage and Forecast to 2020 SAMPLE.xlsx

Forecasts for take-up to 2020

Provides forecasts for the take-up of standard and NGA fixed-line broadband services to 2020 for the 28 member states of the European Union plus Iceland, Norway, Switzerland and Turkey.

See sample spreadsheet < MBES05 Forecasts for Take-up to 2020 SAMPLE.xlsx>

Country summaries

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom

Each summary is written to a standard template. First an overview presents the main market statistics for each country and the shares of the different fixed broadband technologies. The following four sections summarise the market situation and the main players for each technology in turn; DSL and VDSL over the telephone network, FTTP over fibre-optic networks, Cable broadband using the cable TV infrastructure and FWA or fixed-wireless access.

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