



Local Authorities & Ultra Broadband

What role for local players?

**Market
Report**

This market reports provides an inventory of the main FTTH rollouts initiated by local authorities in Asia, the United States and Europe. It examines the ways in which local authorities can intervene in the process and the different business and legal models that have been implemented, then lays out the advantages and risks for local authorities involved in deploying Ultra Broadband infrastructure.

Key questions

- What are local authorities' decision-making criteria for extending fibre to subscribers?
- What are the terms and means of involvement?
- On what hypotheses are the implemented business and legal models based?
- What role does regulation play in local authorities' initiatives?
- What are the issues involved in a financial investment and what role do financial organisations play?
- How do local authorities incorporate Ultra Broadband into their long-term strategy?



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What role for local players?

1. Asia

Interest from local players, but private operators predominate

1.1. South Korea

- U projects- cities
- Kwangju's City of Light project
- City of Busan thriving with U-city services
- New Songdo City – NSC – and its U-New Town project
- Seoul, the Digital Media City (DMC)

- Inventory of local authority involvement in South Korea

1.2. Japan

- Government involvement in Ultra Broadband
- Local authorities' positioning
- Inventory of local authority involvement

2. The United States

Local authorities and ILECs

2.1. The broadband and ultra-fast broadband market

- FTTH's share of the American broadband market
- FTTH operators' share of the American broadband market

2.2. Regulation

2.3. Market specifics and forecasts up to 2013

- FTTH/B and VDSL subscriber growth

2.4. Local authorities' FTTH projects

- FTTH networks deployed by municipalities in North America
- UTOPIA
- Grant County Public Utilities District, Washington
- City of Bristol, Virginia
- City of Powell, Wyoming

3. Europe

Local authorities' Ultra Broadband initiatives

3.1. Sweden

Banking on open and neutral networks

- Stockholm, FTTH city
- Västerås

3.2. The Netherlands

Local authorities' urban FTTH projects

- Amsterdam
- Appingedam

3.3. France

Local authorities, major contributors to the spread of broadband

- Regulatory framework
- Over 100 broadband rollouts instigated by local authorities
- First FTTH rollouts instigated by local authorities
- Hauts de Seine Departmental Council
- Manche Numérique (Digital English Channel)
- City of Montpellier
- DEBITEX
- Operator services supplied by public FTTH project managers

3.4. Role played by utility companies

4. Conclusion & Outlook

4.1. Main forms of local authority involvement

- Local authority as manager of the public domain
- Positioning in regional development
- Local authority as a major player in Ultra Broadband rollouts
- Varying degrees of involvement in theory and in practice

4.2. Advantages and risks for local authorities

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