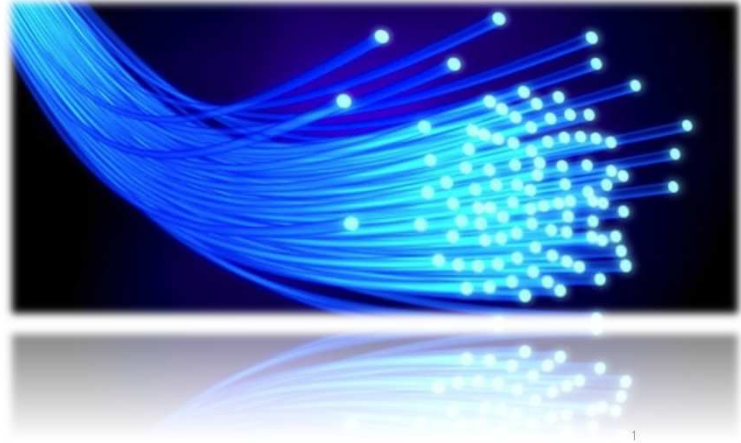


## OPEN FIBER

### Enabler of the Fiber society

open fiber



Rome 3<sup>rd</sup> of July

Andrea Cortesi  
Head of Engineering and Planning  
OpEn Fiber

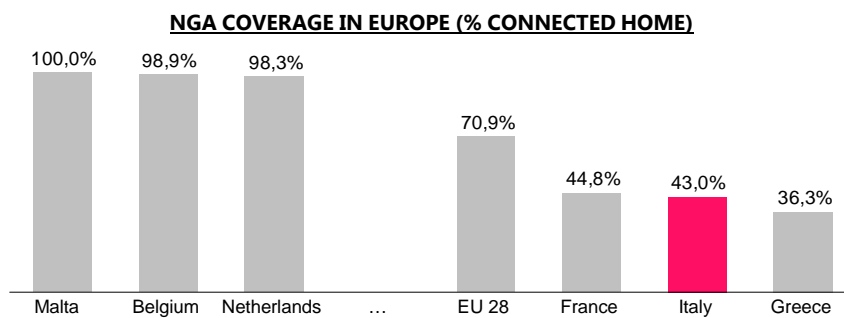
1

## The Italian market scenario

### NGA coverage in Italy & Europe

open fiber

In 2015 **NGA coverage** (speeds over 30Mbps) in Italy reached 43%, while in Europe the average has been 70.9%.



Source: Digital Agenda Scoreboard 2016

2

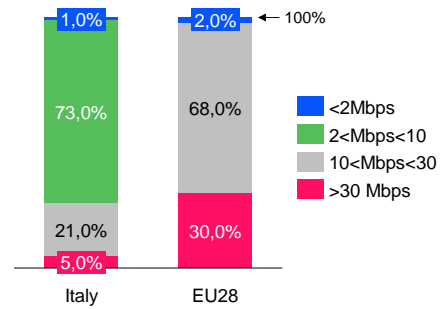
## The Italian market scenario

### Broadband fiber speed in Italy and Europe



- In Italy only 5% of total broadband connections exceed 30Mbps, while in Europe (EU 28) this percentage reached 30% in 2015.
- Moreover in Italy most of the connections are between 2 and 10 Mbps (73%), while in EU 28, 68% of the total connections exceed 10Mbps

**BROADBAND FIBER SPEED (%)**



3

Source: Digital Agenda Scoreboard 2016

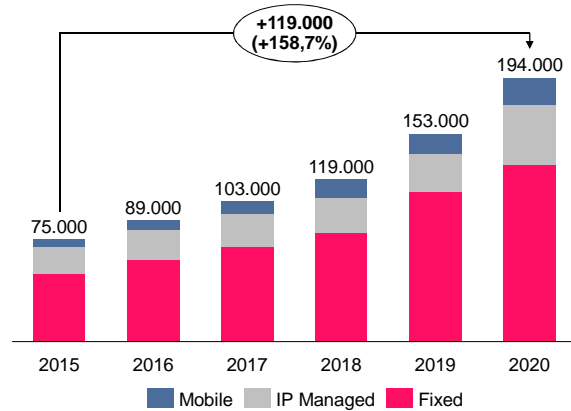
## Italian market scenario

### Data traffic preview WorldWide



- According to Cisco, we will be facing a new industrial revolution who will bring a huge amount of IP Traffic ( HD, UHD)
- In 2020 data traffic will exceed 194 thousand petabytes per month.
- 130 thousand petabyte per month will refer to Fixed Network, with a growth rate of 21%.

**IP TRAFFIC WORLDWIDE (Petabyte/month)**



4

Source: Cisco

## Italian market scenario

“BUL – Banda Ultralarga Italian Strategy”

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In 2015 the Italian government defined The **Italian National Strategy for ultrabroadband** (“Strategia nazionale per la banda Ultralarga”) in line with the European Digital Agenda targets, expected by 2020:

- Cover at least **30 Mbps for 100%** of the population;
- Cover at least **100 Mbps for 85%** of the population.

**100% OF POPULATION**  
**30 Mbps**



**85% OF POPULATION**  
**100 Mbps**

**For How long the 100 mbps will be enough?**

5

## Italian market scenario

The white and black areas of the ultra-broadband Strategy

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The whole Italian territory has been divided into 4 clusters on the basis of potential market:

- Cluster A&B : matching about 60% of total Italian population, corresponding to main cities where operators will invest directly with private funds;
- Cluster C&D: matching about 40% of total population, corresponding to suburban and rural areas where operators will invest with public funding

	A BIG CITIES	B CITIES	C SUBURBAN	D RURAL
<b>POPULATION</b>	9,4 MIL	28,2 MIL	15,7 MIL	9,4 MIL
<b>MUNICIPALITY (#)</b>	15	1.120	2.650	4.300

## Open fiber

### Mission and Business Model

open fiber

Open Fiber was formed in December 2015 to ensure the coverage in Italy of Fiber Optic Infrastructures enabling broadband services.

#### MISSION

to Develop a telecommunication infrastructure throughout the Country as accelerating factor in achieving the objectives of the **European Digital Agenda and BUL Strategy**

#### BUSINESS MODEL

**Wholesale Only Operator:** operates in the wholesale markets ensuring fair conditions and non-discriminatory access to all operators

#### NETWORK MODEL

Next Generation Networks **Fiber to the home (FTTH)**, future proof that guarantee speeds beyond 1 Gbps

7

## Open Fiber

### Main figures and facts

open fiber

#### FTTH

The technology of the future: Fiber to the home

**271**

Municipalities to be covered

**5-6 years**

Time to cover Italy with the Fiber

**Up to 1 Gbps**

Speed transmission

**32 Operators**

Already contractualized

**9,5 Mln**

Houses/Building to be covered

**3,7Mld**

Investment amount to cover Italy

**4 Mln**

km of fiber to be in Italy

8



