



Industry Update

2017 – Fibre comes of age!

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Dark Fibre Access

1. Dark Fibre Access (DFA)

- Due to launch October 2017
- CAT ruled against OFCOM in July 2017

2. Openreach launching a 10Gb + OSA semi Dark fibre access

- Suitable for core network links

Major FTTP roll-out

- Fibre to the premises
- Primarily broadband (asymmetric / contended)
- Fibre extended from FTTC Cabinet
 - Up to 1Gb
 - 2m premises by 2020
 - 10m premises by 2025

Ultrafast Broadband – G.fast

- Up to 330Mb
- G.fast equipment locates bolt-on cabinet beside PCP in local network
- 350 metres from premises to G.fast equipment
- Primarily suited to PCPs in urban areas

Openreach to split from BT

- Separate company:
 - Openreach Limited. No. 10690039
 - Independent Board
 - Employs 28,000 engineers
 - Exchanges, copper and fibre network – ownership retained by BT Telecommunications PLC

Utility / Civils issues

- All providers experience major issues
- Blocked ducts
- Council permission
- Traffic management
- Repeat blockages
- Notice periods

Carillion in Liquidation

- Openreach contract with Carillion Telent joint venture
- Carillion in liquidation
- Telent assumed 100% ownership control of jv from 15.01.18
- Business as usual
- Hopefully Civils performance may improve!

Universal Service Obligation (USO)

- Digital Economy Act, 2017
- 10Mb minimum
- From 2020
- Enforced investment by BT in sub-10Mb areas
- BT's voluntary proposal rejected

Future

- 1Gb take-up
- FTTP broadband availability
- Impact of USO
- Ethernet increasingly commoditised!