

Investment and Connectivity

Presentation at the IIC conference in Riga

18 June 2019



There is a strong push in Europe to invest in digital services to support the Gigabit Society



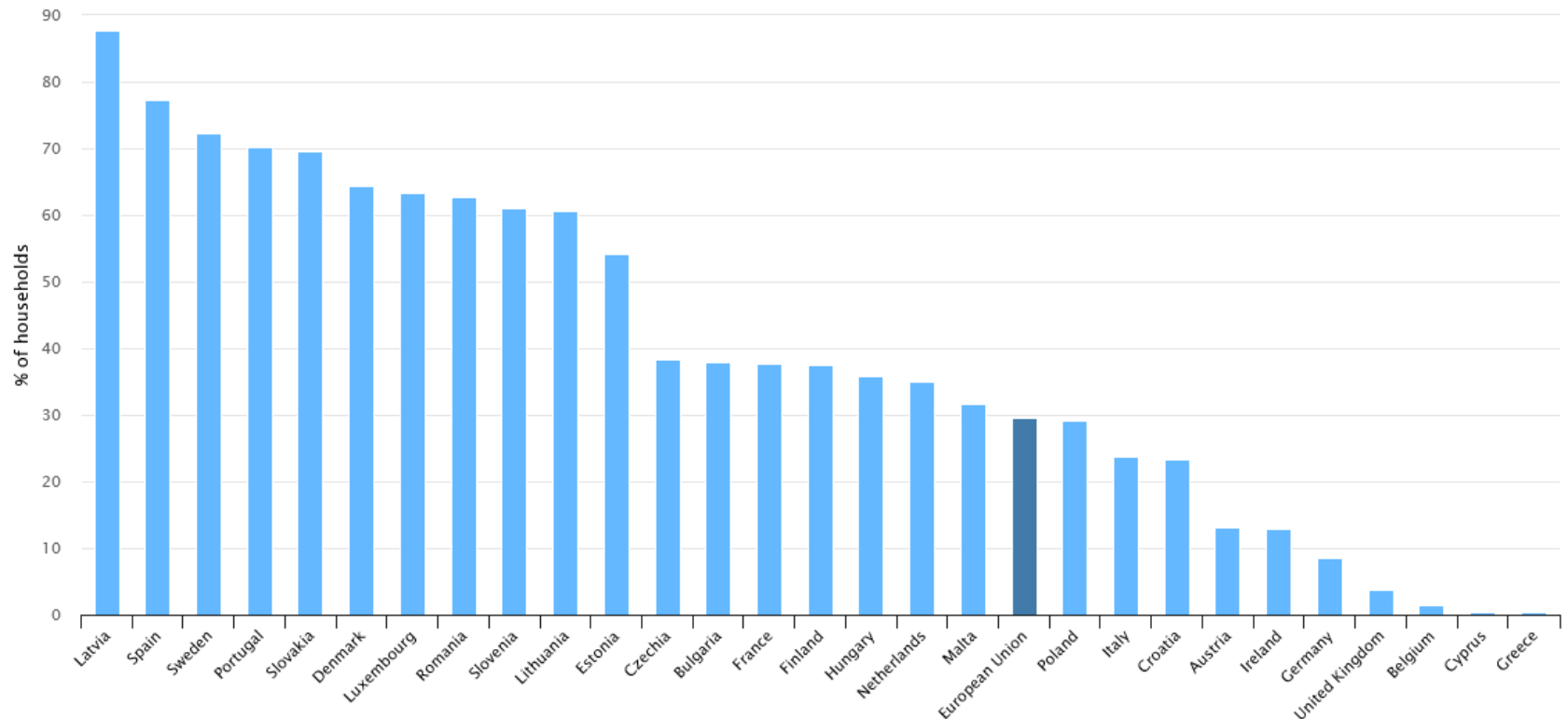
BY 2025

- All schools, transport hubs and main public providers should have access to internet connections with speeds of 1 Gbps.
 - All European households should have access to at least 100Mbps download speeds, which can be upgraded to 1Gbps.
 - All urban areas as well as major roads and railways should have uninterrupted 5G coverage.
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Common EU broadband targets for 2025

But, there is a significant variation in fibre availability across Europe

Fibre to the Premises coverage/availability (as a % of households), Total
Year:2018



European Commission, Digital Scoreboard

While some of this variation can be explained by external factors, e.g. housing density, the regulatory policies are also important.

We examined how regulatory conditions in 12 EU countries affected each of the steps involved in deploying fixed and mobile networks, to identify both barriers and best practice

Civil engineering costs represent up to 80% of fibre deployment costs. These costs are greatly reduced if PIA is effective



Applications to deploy mobile sites: 40-540 days
At a cost \$150 – \$14,700



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