

Understanding the Digital World

Wireline



FTTx Equipment Vendors

Strategies, technologies, market share

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- This document is a part of our "Wireline" category which includes in 2014:
 - a dataset in Excel, updated twice yearly
 - a state-of-the-art report in PowerPoint, updated twice yearly
 - five market reports in Word, each with its synopsis in PowerPoint
 - Privileged access to our lead FTTx analysts

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A member of the IDATE team since 1998, Roland is the Chief analyst and Head of the Broadband/FTTx business unit. Over the past several years, he has managed several assignments devoted to the economics of DSL, cable and wireless access networks. These assignments were global in scope and dealt with issues such as bundled offers on DSL and the economics of bitstream and LLU. For the satellite sector, he has headed up various assignments on the economics of satellite broadband access (AGORA) and on market opportunities for a Satellite-DMB offering. Roland Montagne manages all of IDATE's FTTx-related activities. In this capacity, he has been involved in a range of assignments focused on wireless digital communications and mobile services. He worked for a year at AT&T as a research engineer, and at Bell Labs in New Jersey in the US. Roland has also conducted research on optical networks (DWDM) and ATM technologies. He has completed several research internships at CNET (France Télécom R&D) on optical communications. He is a graduate of the Ecole Nationale Supérieure des Télécommunications de Paris (Télécom ParisTech), class of 1994, in addition to having a post-graduate degree (DEA) in electronics from Université Paris VI, 1994.

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About IDATE and DigiWorld Institute



Founded in 1977, IDATE has gained a reputation as a leader in tracking telecom, Internet and media markets, thanks to the skills of its teams of specialized analysts. Now, with the support of more than 40 member companies – which include many of the digital economy's most influential players – the newly rebranded DigiWorld Institute has entered into a new stage of its development, structured around three main areas of activity:

- **IDATE Research**, an offer of market intelligence publications
- **IDATE Consulting**, time-tested analysis
- **DigiWorld Institute**, a think tank on the digital economy.



Contact us for further information on our publications

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Contents

1. Executive Summary	5
2. Methodology & definitions	6
2.1. General methodology of IDATE's reports	6
2.2. Methodology specific to this report.....	7
3. FTTx technologies.....	8
3.1. Copper-based technologies are still evolving	8
3.1.1. VDSL2 Vectoring.....	8
3.1.2. G.Fast and beyond.....	9
3.1.3. FTTdp.....	10
3.2. FTTH technology: PON innovations and markets	11
3.3. Coax technology: an attractive market for vendors.....	12
4. Major equipment vendors in access markets	14
4.1. FTTH/B players and major vendor partners.....	14
4.2. The PON market and equipment vendors in 2013.....	16
4.3. The VDSL2 Vectoring market and its leaders	19
4.4. Prospects.....	21

Tables & Figures

Table1:	Key FTTH/B partnerships, by country	15
Table 2:	Top 5 PON OLT vendors in 2013	17
Table3:	Top 5 PON ONT vendors in 2013.....	17
Table4:	Major FTTH contracts in 2013	19
Table5:	Major FTTH contracts, Q1–Q2 2014.....	22

Figure 1:	Theoretical performance of VDSL2 Vectoring.....	8
Figure 2:	Evolution of DSL technologies: from VDSL2 to '5GBB'.....	10
Figure 3:	Various possibilities for FTTdp.....	11
Figure 4:	Opportunities for allocating different wavelengths per service with TWDM-PON.....	12
Figure 5:	TWDM-PON deployment on a GPON OSP	12
Figure 6:	D-CMTS architecture	13
Figure 7:	Equipment vendors' market shares for PON OLT access in 2013.....	16
Figure 8:	Equipment vendors' market shares for PON ONT access in 2013	16
Figure 9:	Key Vectoring partnerships with Alcatel-Lucent, December 2013	20
Figure 10:	Key Vectoring partnerships with Huawei, December 2013	21

2. Methodology & definitions

2.1. General methodology of IDATE's reports

The methods employed by IDATE's teams of analysts and consultants are based on an approach that combines:

- research and validation of data collected in the field;
- the application of classic industry and market analysis tools: segmentation, competition analysis, strategic strengths, modelling, assessment and forecasts...;
- the expertise of specialists who contribute their own analytical capabilities and those of their network of market analysts.

More specifically, the tools employed by IDATE's teams are as follows:

1/ A multi-disciplinary team of full-time consultants, specialised by sector of activity

IDATE's analyses are performed primarily by our in-house consultants, and very occasionally by freelance market analysts. This approach allows us to capitalise on our pool of expertise through teamwork, sharing knowledge, ideas, contacts, viewpoints and key data. Each report is drafted by a team of specialists, overseen by senior consultants with a proven track record in their field.

2/ Primary and secondary research

IDATE reports and databases are compiled based on primary data obtained from one-on-one interviews with the sector's decision-makers, and on secondary data which is established by cross-referencing public sources and external databases.

3/ An integrated information centre sustained by a number of tools and proprietary databases

Over the past 30 years, IDATE has established working and data organization methods and proprietary databases that trace the central chapters in the history of our sectors of expertise.

- **Companies:** IDATE's in-house data service tracks the latest news and events to come out of the top telecom, Internet and media industry companies around the globe. Innovative firms and start-ups are monitored by the market experts in the different "Practices".
- **Markets:** IDATE's databases are derived from rigorous processing of fundamental economic variables (GDP, investments, exchange rates, demographics, etc.) and their relation to decisive sector-specific and national elements (capex, national market dynamics, etc.).
- **Technologies:** IDATE's organization by Practice provides us with an efficient means of tracking innovation. IDATE's engineers ensure in-depth understanding of the changing shape of products and services and of the latest innovations in the marketplace.

4/ Contents of the published reports

Each IDATE market report details the structures and issues at play in the market being examined, the decisive forces (technologies, regulation, consumption) and the players involved. Particular emphasis is given to market assessments and forecasts, as part of the central premise. All market reports are laid out in a clear and concise manner, and illustrated with tables and graphs of key market data and trends.

The process of drafting of a market report includes the following stages:

- analysis of the information available in the in-house databases, and review of analyses performed in the recent past;
- based on a preliminary segmentation and assessment of the market, and as part of an validated interview guide, analysts conduct interviews that enable them to validate working hypotheses;

- a market model is then established, making it possible to test the hypotheses that have an impact on the market's development, and validated by a new round of interviews;
- and, finally, the report's conclusions are debated with the team responsible for the project and with expert consultants from the various fields involved;
- a final proofreading and editing/revision process, prior to the production of the final version of the report which is delivered to the client.

2.2. Methodology specific to this report

The report is based on a series of interviews and meetings conducted with various leaders in the FTTx access industry, such as Huawei, Alcatel-Lucent, ZTE, Fiber Home, Calix, Adtran and Dasan.

We also used our 'World FTTx market' database, which covers more than 80 countries.