

# Australia - Fixed Broadband Market - Insights, Statistics and Analyses

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## Abstracts

The DSL market shrinks as the NBN is further rolled out. Within the Australian fixed broadband market, there is a dynamic shift among customers to fibre networks, as this infrastructure is being built out by nbn (NBN Co), the company responsible for the national broadband deployment. Australia's broadband sector is making improved progress in its migration to a multi-technology National Broadband Network (NBN).

Australia's NBN is delivered via a multi-technology mix (MTM) to homes and businesses including: fibre to the premises (FTTP), fibre to the building (FTTB), fibre to the node (FTTN), Hybrid Fibre Coaxial (HFC), fixed wireless and satellite.

The purpose of the company nbn is to build a nationwide, wholesale-only, high-speed, affordable open broadband network. NBN Co was rebranded as nbn, the company overseeing Australia's National Broadband Network (NBN) project. As it does not provide telecommunications services to retail customers, the market opened up existing and new licensed RSPs (Retail Service Providers).

The NBN will increase Australia's GDP by up to \$10 billion and create up to 150,000 new jobs nationally in the digital industry by 2021. The establishment of businesses in areas served by the NBN so far grew at twice the rate of the national average and five times the pace of regions without the network.

NBN Co announced plans in 2018 to be able to more efficiently deploy fibre to the curb (FTTC) services instead of its more conventional DSLAM-based fibre to the basement (FTTB) services when connecting smaller multi-dwelling units (MDUs).

The annual growth rate in the overall number of broadband subscribers is expected to

continue to slow into 2019, with most growth coming from the mobile wireless and fibre broadband markets, due to increased uptake by the nbn in these two segments.

The DSL sector is expected to shrink as customers are migrated to the NBN in areas where services become available, while subscribers on HFC infrastructure will continue to be provided by existing cable within the NBN's multi-technology mix. Commercial cable services based on the DOCSIS3.1 standard are anticipated in 2018-19.

The DSL sector is still showing resilience as operators make greater use of VDSL, while nbn has trialled G.Fast technology and expects to provide services shortly.

The fixed-line broadband market continues to grow steadily as the nbn rollout gains momentum, although overall penetration is predicted to grow slowly over the next five years to 2023.

Internationally, the adoption of broadband ranks Australia below many other developed countries, however the Australian market has seen a moderate increase over the past two years due to the continued rollout of the nbn.

Consolidation within the broadband market, with some key acquisitions having taken place among fixed broadband service providers, will provide greater reach and scale for operators in coming years.

The industry has started to seriously question the regulatory environment around the NBN. The smaller players believe they are in danger of being squeezed out of the market through complex and expensive NBN wholesale offerings. These same arrangements also mean that the end-users are not receiving the benefits of high-speed broadband in an affordable form.

NBN Co has revealed plans to begin deploying "skinny fibre" (thinner fibre cables) in new housing estates from 2017-2018.

The National Broadband Network announced it would entirely abandon its plan to use the Optus Hybrid Fibre Coaxial (HFC) network to deliver high-speed broadband. NBN will however still be using Telstra's more extensive HFC network as planned.

## Key Developments

NBN Co deploy fibre to the curb (FTTC) services instead of DSLAM-based fibre.

NBN Co will deploy “skinny fibre” (thinner fibre cables)

The NBN will increase Australia’s GDP by up to \$10 billion.

The DSL sector is expected to shrink as customers are migrated to the NBN.

Consolidation within the fixed broadband market has occurred over the past few years.

The annual growth rate in the fixed broadband market is expected to continue to slow over the next five years to 2023.

Key companies mentioned in this report:

NBN; Austar; Ericsson; Visionstream; Optus, iiNet, AUSTAR, Foxtel, Neighbourhood Cable, TransACT. Optus, Telstra, nbn (NBN Co), LBNC Co, OPENetworks, OptiComm, RedTrain, Pivit, Fibercorp.

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