



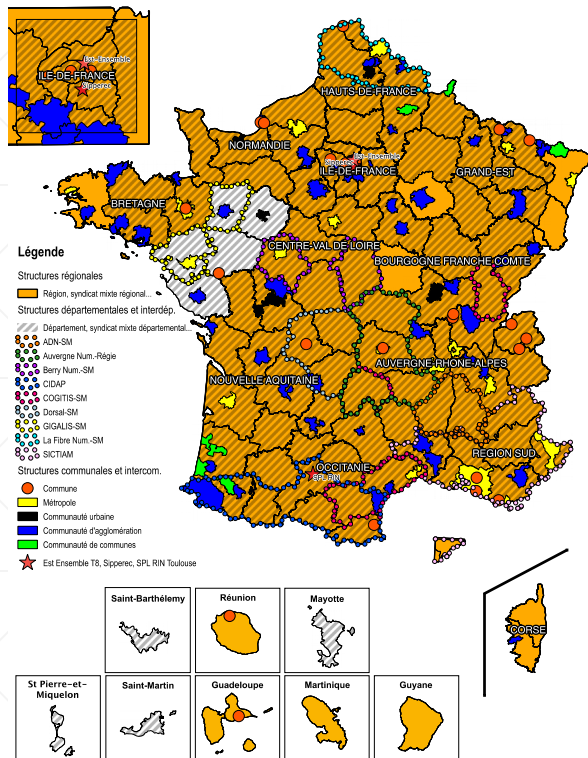
BattleMesh

Paris, 12 July, 2019

Ariel TURPIN, Executive Officer of AVICCA

Presentation of AVICCA

Association des villes et collectivités pour les communications électroniques et l'audiovisuel



- Formed in 1986
- Avicca's members in 2018 :
 - 23 cities, 85 joint associations of local authorities, 111 local authorities (départements and regions) : we represent 67 000 000 d'habitants
- Focus of work :
 - Wireless lines and wired digital infrastructures
 - Digital education
 - Smart cities
- AVICCA is working on 3 processes :
 - Experience-sharing
 - Sharing of resources among members
 - Collective actions



AVICCA is in the core of an ecosystem (1/2)

- AVICCA is working with legislators, ministries, states services, research departments, equipment suppliers, operators, constructors, etc. but remain entirely independent (its resources come mainly from its members)
- AVICCA coordinates its actions with the others principal local government associations



AVICCA is in the core of an ecosystem (2/2)

- AVICCA is a member of :
 - Coordination committee France High Speed Broadband
 - Coordination committee France Mobile
 - Interconnection and access committee (Arcep)
 - Copper Committee of experts (Arcep)
 - Fiber Committee of experts (Arcep)
 - Public networks operational committee (Digital agency)
 - Local public televisions (TLSP)

Policies for regional digital planning and development

- What is a “public service delegation”
- Concession agreements
- Leasing agreements
- Construction contracts



Legal models



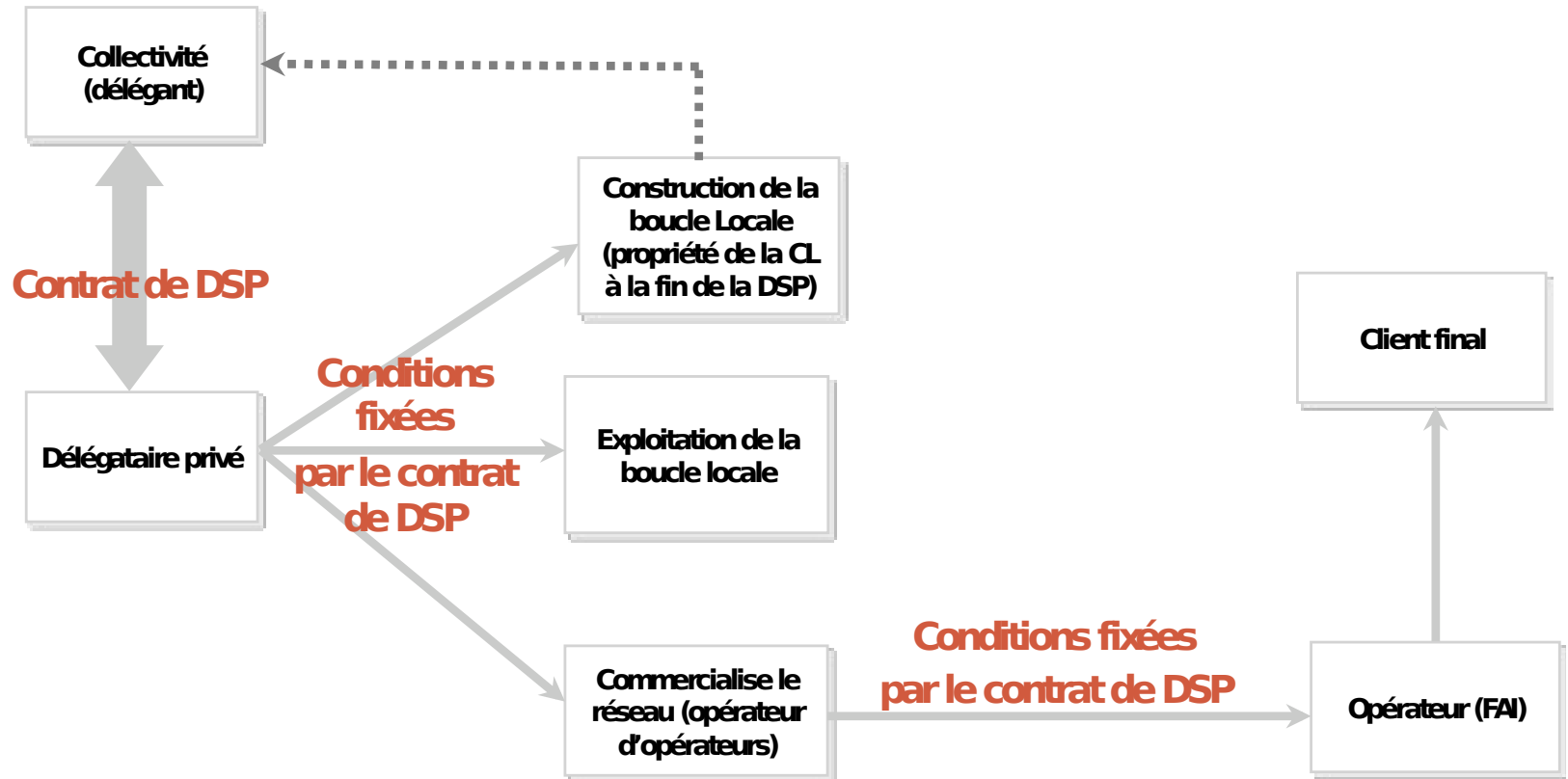
“Délégation de service public” (DSP)

Article L 1411-1 of French law on local authorities : « A **public service delegation** is a contract by which a legal person governed by public law entrusts the management of a public service for which it is responsible to a public or private delegate, whose remuneration is substantially linked to the results of the operation of the service. The delegate may be responsible for building works or acquiring goods necessary for the service ».

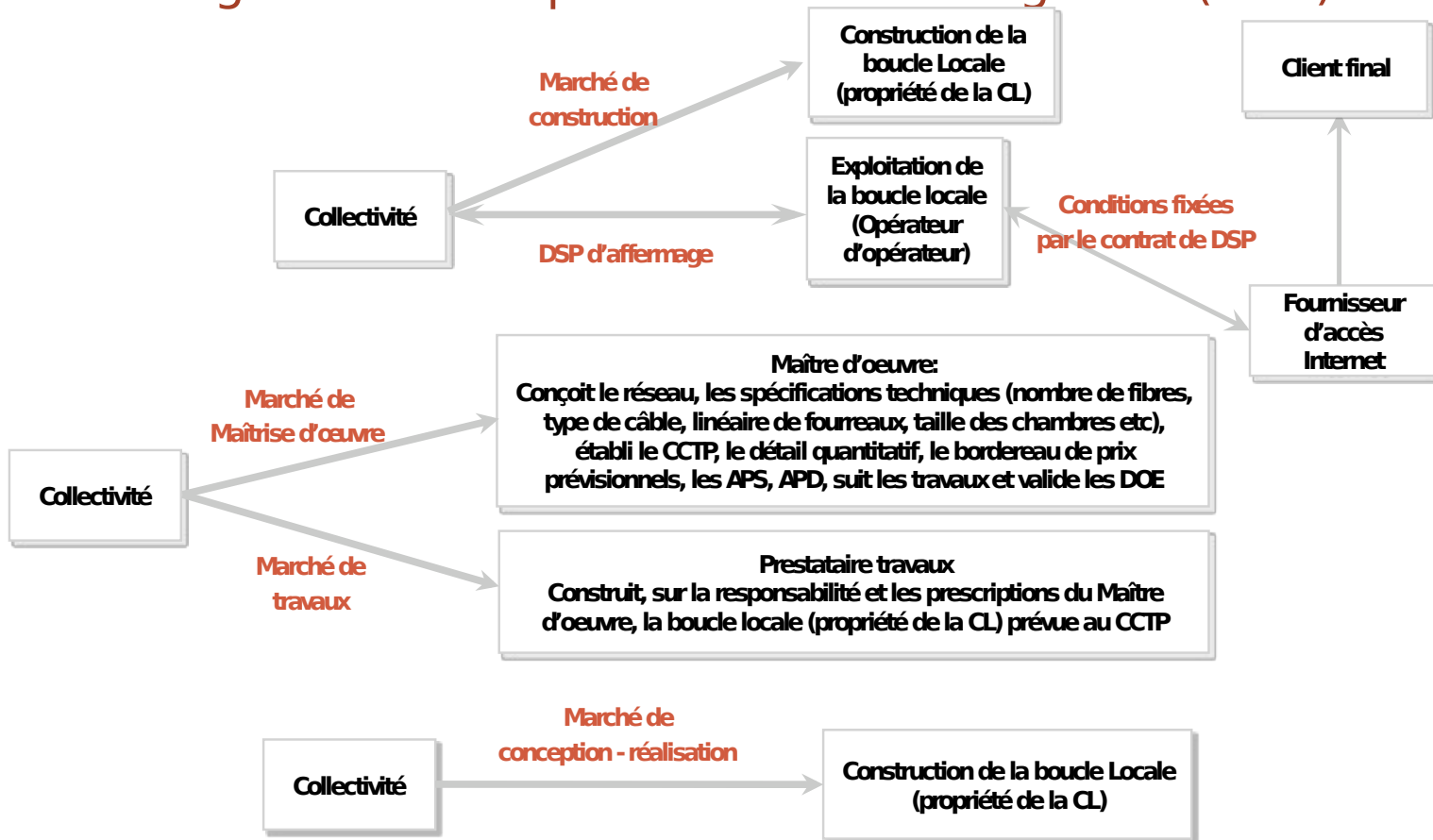
The use of a “concession” DSP is a good model of public-private partnership when the local authority does not want to invest the full amount required to build the public equipment.

However, the alternative model of “leasing” DSP is also very common.

“Concession” model for public service delegation (DSP)



“Leasing” model for public service delegation (DSP)





Differences
between private
and public network
deployment

Public BtoB market (RIP 1G)

Carte des ROIP

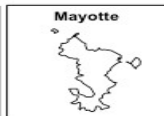
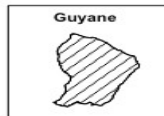
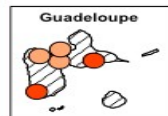
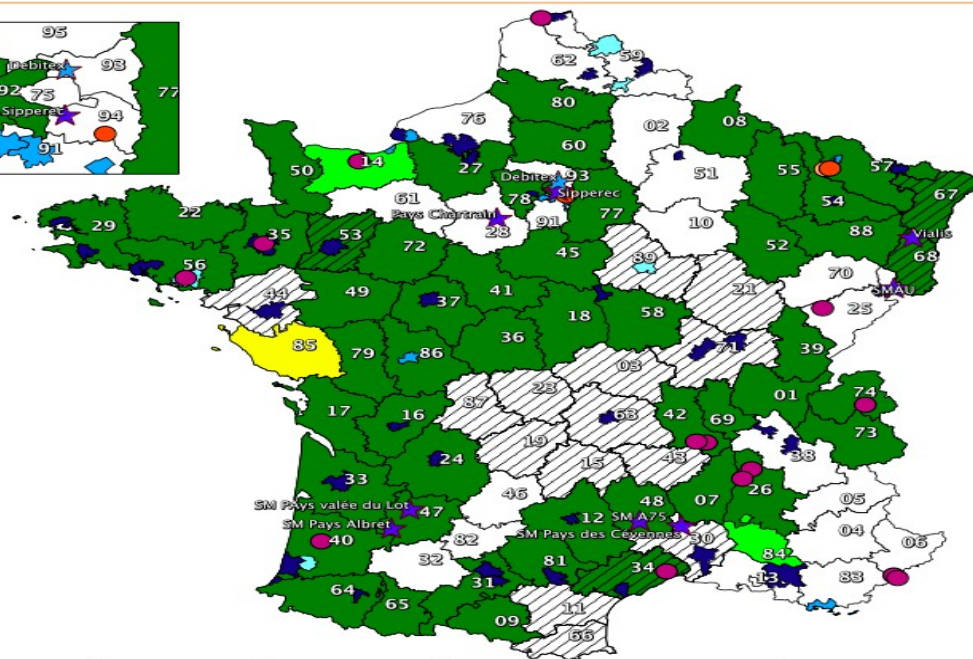
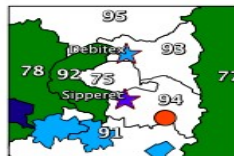
Carte éditée par AVICCA (octobre 2012)
Fonds GEOFLA® IGN
Base Nationale sur l'InterCommunale
(Ministère de l'Intérieur - DCCCL)

Légende

-  Procédure en cours échelle régionale
-  Marché attribué échelle régionale
-  Réseau en exploitation échelle régionale
-  Procédure en cours échelle départementale
-  Marché attribué échelle départementale
-  Réseau en exploitation échelle départementale
-  Procédure en cours échelle intercommunale
-  Marché attribué échelle intercommunale
-  Réseau en exploitation échelle intercommunale
-  Procédure en cours échelle communale
-  Marché attribué échelle communale
-  Réseau en exploitation échelle communale

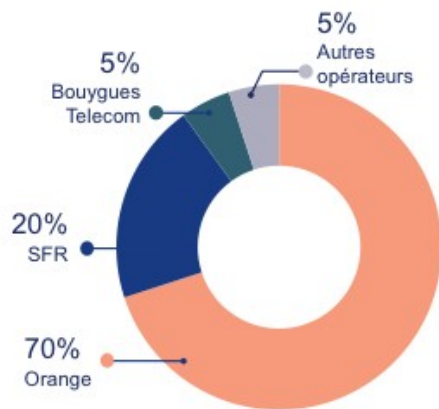


AVICCA : Association des Villes et Collectivités
pour les Communications électroniques et
l'Audiovisuel



BtoB : few competitors, low digital transformation

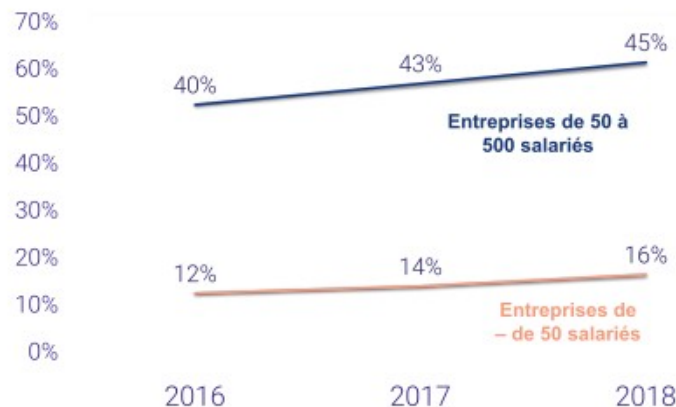
Un marché des services télécoms aux entreprises peu concurrentiel au niveau national



Estimation des parts de marché pour les télécoms d'entreprises

Estimations IDATE DigiWorld à partir de données ARCEP

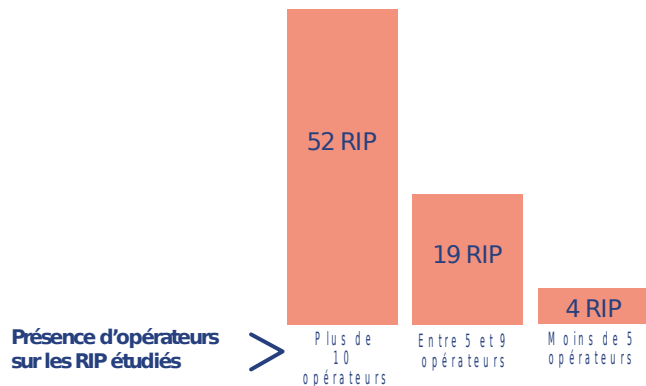
Faible taux de pénétration de la fibre optique, en particulier dans les TPE-PME



Source : IDATE DigiWorld à partir de données publiques

RIP 1G = high level of concurrence

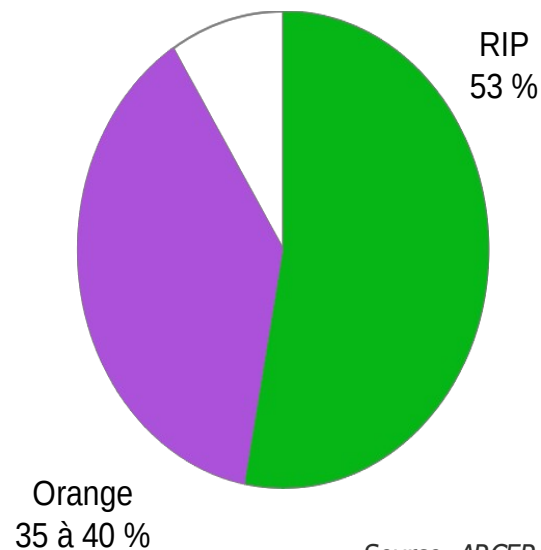
RIP : un modèle concurrentiel pour inspirer la zone privée



Source : IDATE DigiWorld / Délégants / Délégataires

Part de marché de gros sur les offres d'accès de haute qualité sur BLOD

(hors autoconsommation)



Source : ARCEP T2 2016

RIP 2G (FttH)

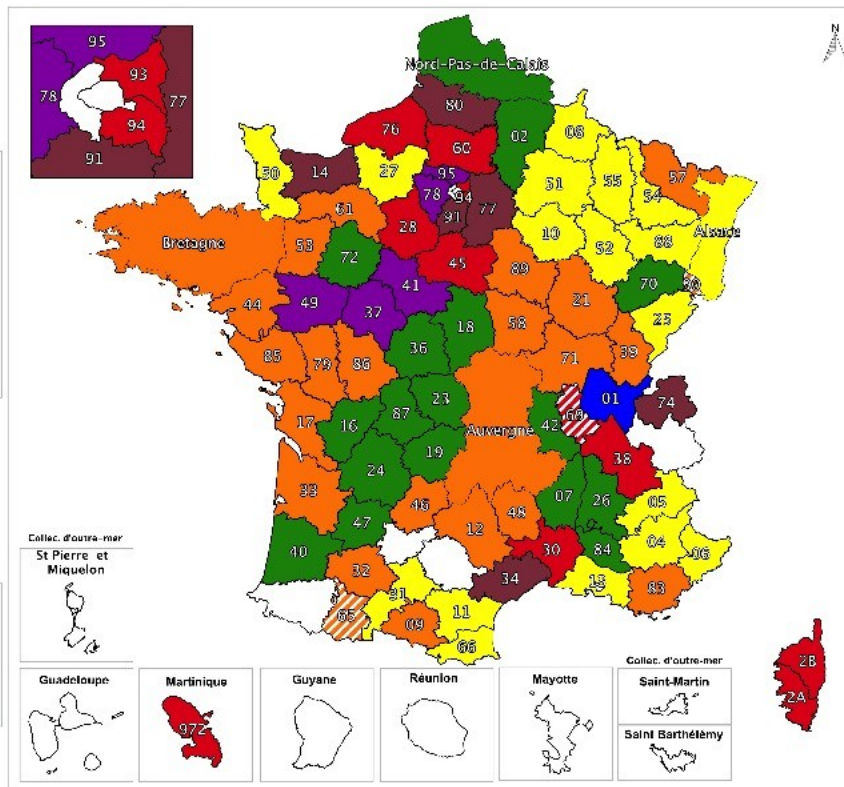
Exploitation FTTH (novembre 2018)

Légende

- ALTITUDE
- AXIONE
- COVAGE
- ORANGE
- Régie Collectivité
- SFR Collectivités
- TDF
- Convention Orange
- Conventions SFR

avioca

Fidélité avioCA (novembre 2018)
Fonds GEOCLA (CN 2015-2-1)
DOCI (2016)

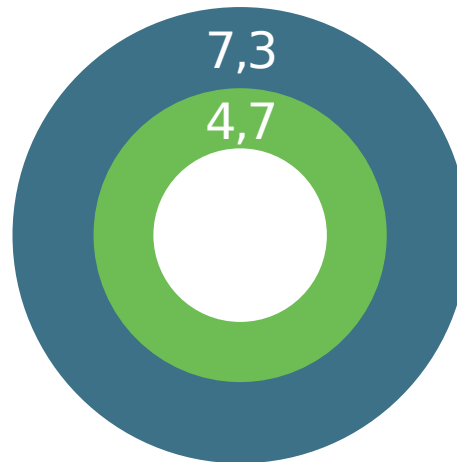


RIP 2G = good level of concurrence

Ventes nettes mensuelles pour 1 000 prises commercialisables

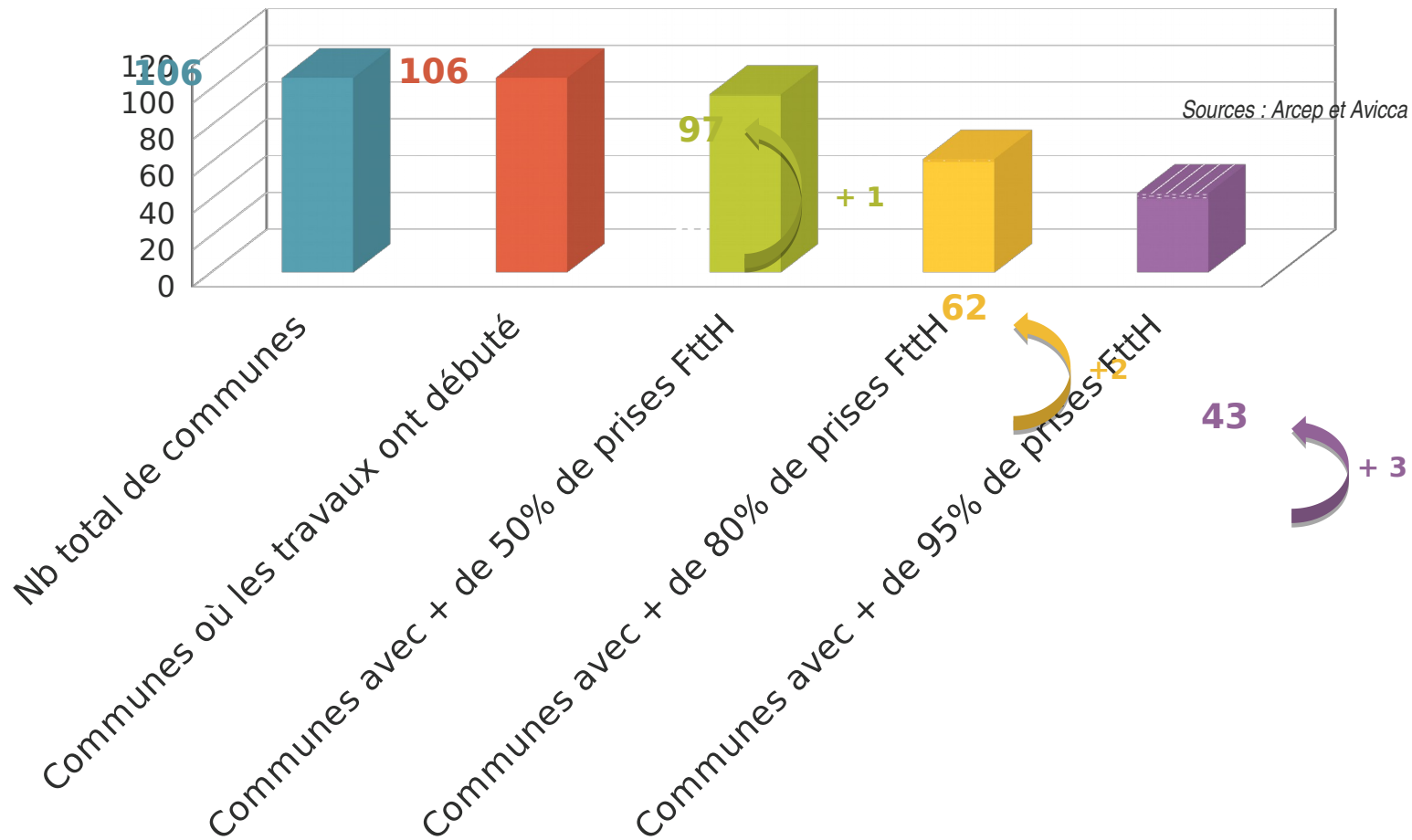


Moyenne par OCEN
en zone privée

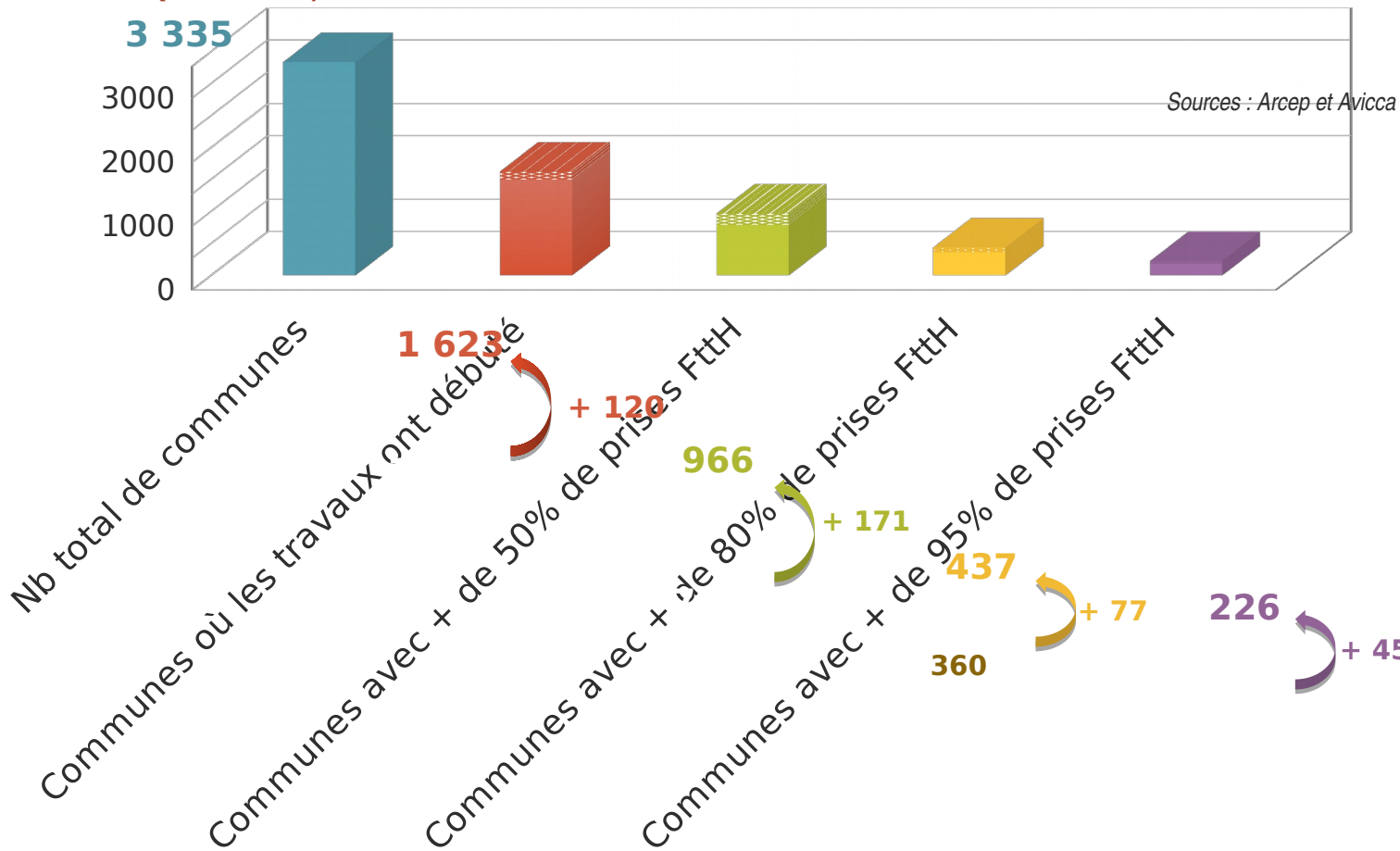


Moyenne par délégataire en
zone RIP (activés),
dont FAI hors OCEN

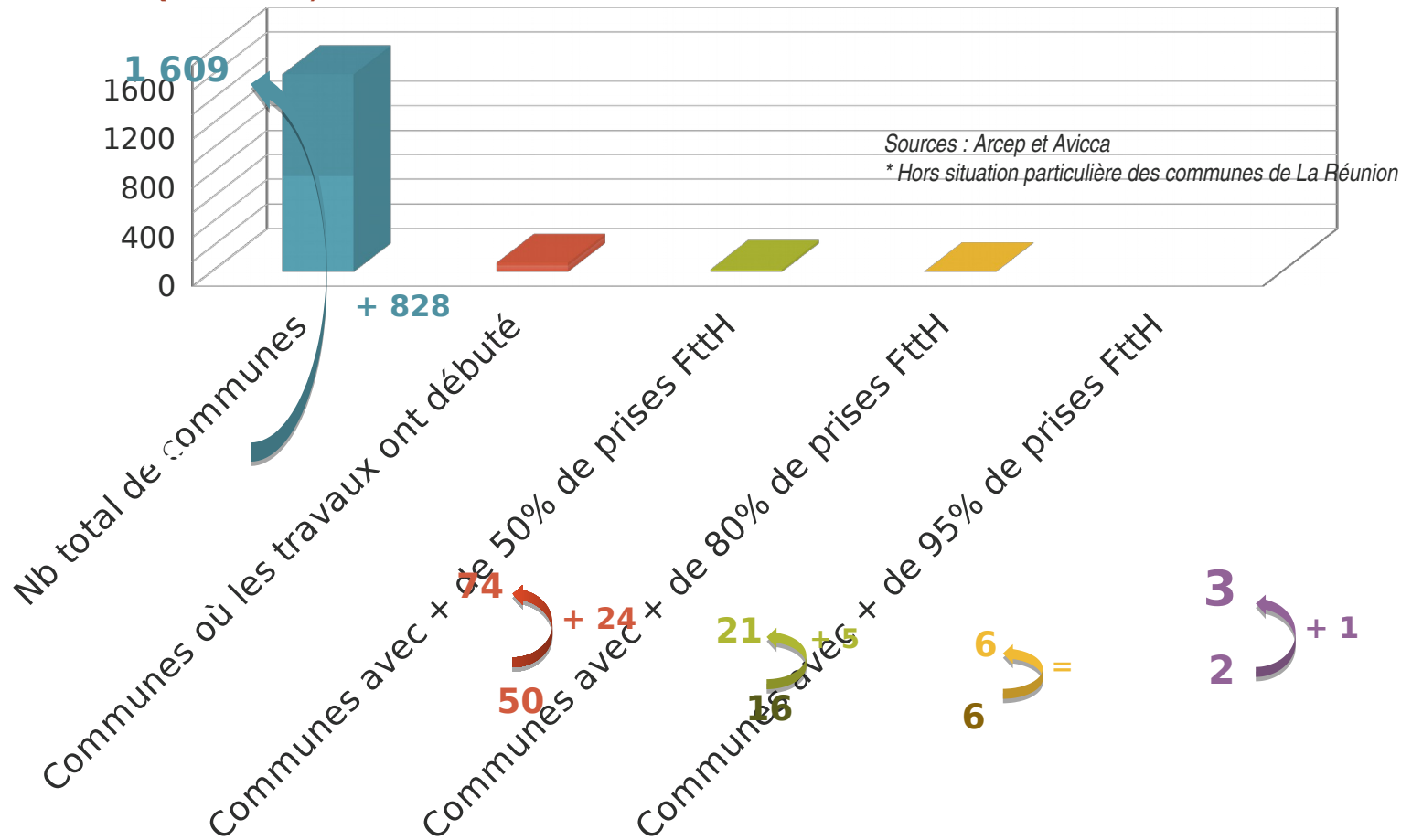
Very high-density areas : (evolution between Q4 2018 and Q1 2019)



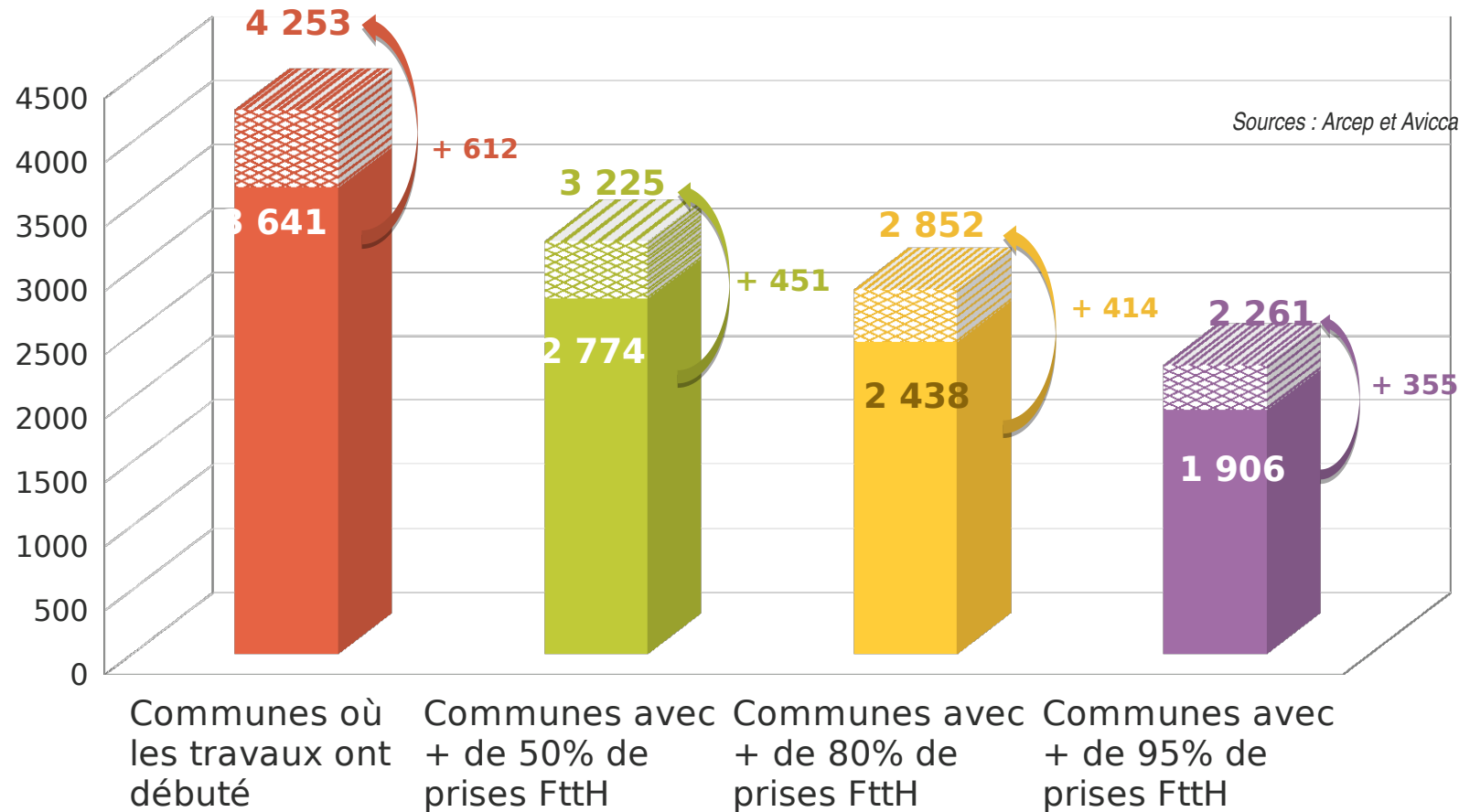
Historical (2011) privat-initiative area : (evolution between Q4 2018 and Q1 2019)



New (since 2011) privat-initiative area : (evolution between Q4 2018 and Q1 2019)

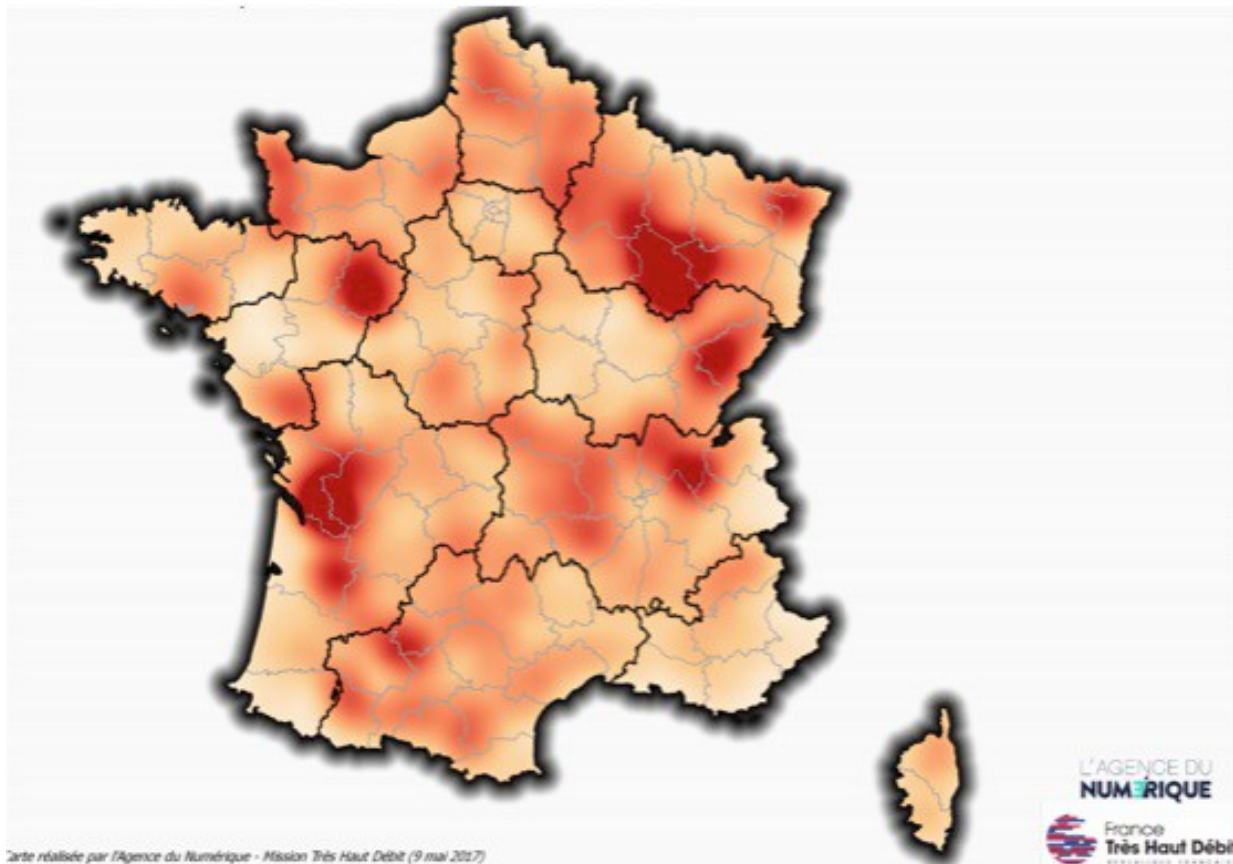


Public-initiative area : (evolution between Q4 2018 and Q1 2019)



**Mobile phone coverage :
two different visions**

Vision of local elected officials

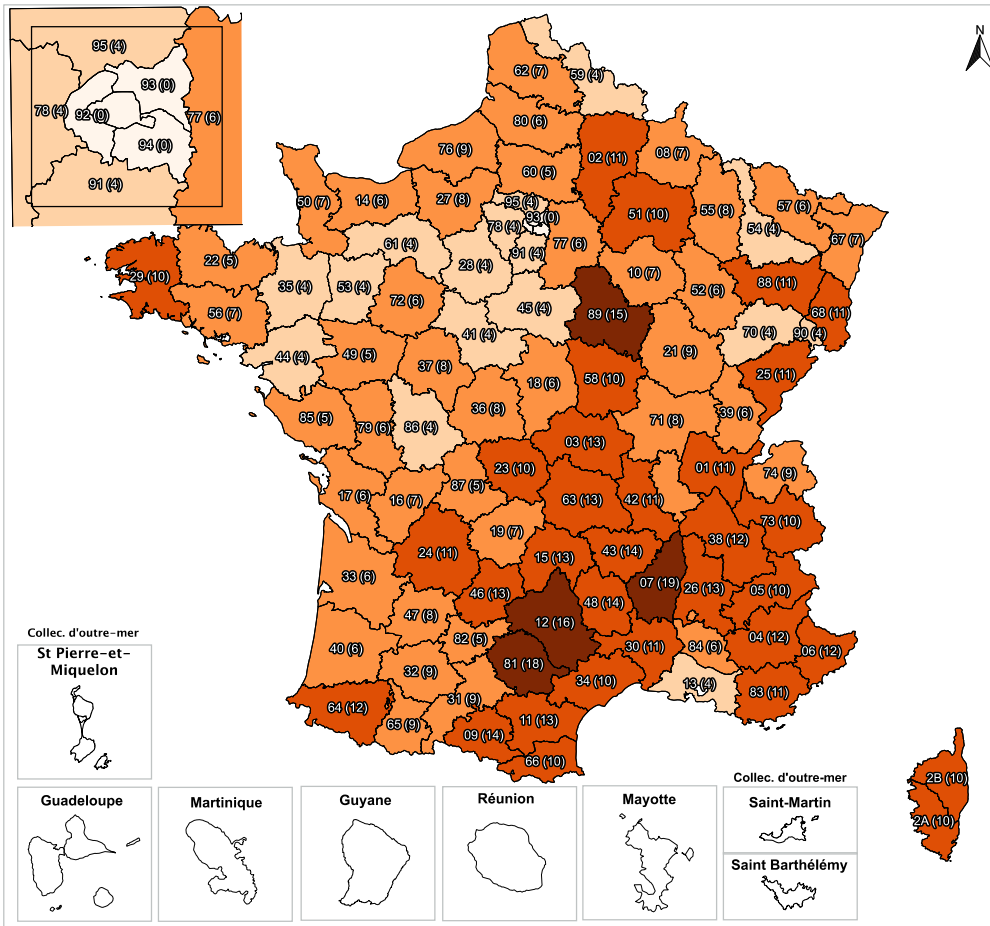


Vision of the State and the operators

Répartition des dotations retenue
par les Ministres pour fin
2018/2019

Légende

- Pas de site
- De 1 à 4 sites
- De 5 à 9 sites
- De 10 à 14 sites
- De 14 à 19 sites



Thank you



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