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Global Service Provider Survey

2020 10G PON Deployment Strategies – Executive Summary

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Report Overview

The ability to predict future bandwidth consumption requirements remains one of the greatest challenges facing broadband operators, as the number of devices and the applications they support, continue to multiply. To overcome this challenge, operators are looking towards network migration strategies that will ensure their customers have sufficient bandwidth to support both current and future applications. Although a variety of ultra-broadband solutions are available across both copper and fiber-based networks; operators are rapidly transitioning towards an all fiber network.

GPON remains the most prevalent FTTH technology. However, its current bandwidth capabilities and its asymmetric characteristics do not provide enough capacity to support the "new normal" with respect to bandwidth demand. Therefore, operators are looking at the latest iterations of the PON standard – 10G PON - for their future network requirements. At present, there are a variety of 10G options available to operators – including 10G EPON, XG-PON1, XGS-PON, NG-PON2 as well as ongoing standards activity related to 25G/50G PON solutions.

Key characteristics that are attracting operators to these next-generation PON solutions include the ability to offer a converged network for both residential and business services, support for multi-gigabit residential broadband along with the ability to re-use many portions of their existing optical distribution network (ODN). However, there remains great concern regarding the coexistence and migration from the existing network to the new network as well as costs related to this technology.

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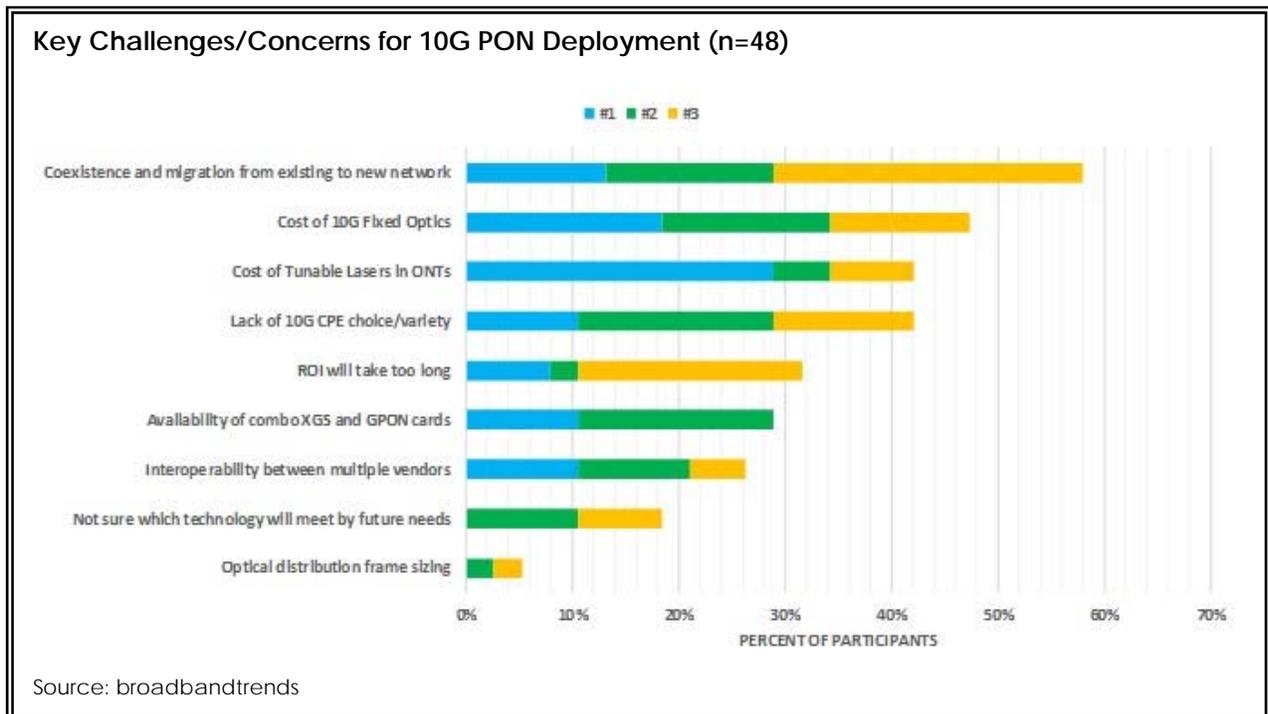
Broadbandtrends' Global Service Provider 10G PON Deployment Strategies survey analyzes the results from interviews with 48 incumbent and competitive operators in all major regions, about their plans and deployment strategies for 10G PON. The report provides a global overview of the results as well as commentary on any notable regional differences found in the results.

Key Questions Answered in this study includes the following:

- *What are operator timelines for the deployment of 10G PON?*
- *Which 10G PON technology will be deployed and which market segments will it serve?*
- *What are the key drivers for deployment of 10G PON technology?*
- *What are the top challenges/concerns related to the deployment of 10G PON technology?*
- *Which services will be deployed via 10G PON?*
- *What is the timeframe for residential 10G PON deployment?*
- *What multi-gigabit speeds will operators offer in the residential market?*
- *Which 10G PON migration path will operators take?*
- *What is their timeframe to migrate to NG-PON2?*
- *How important is Nx10G Wavelengths for NG-PON2*
- *When do operators expect to need greater than 10GPON solutions?*
- *What is the top factor influencing operator vendor selection for 10G PON?*
- *How has COVID-19 Impacted Deployment Plans*

This Report is 31-pages in length with (20) Figures and (1) Table is available for $**1995(USD)**. To order this report, please contact us at 540.725.9774 or via email at mailto:sales@broadbandtrends.com. Additionally, this report may be purchased online at www.broadbandtrends.com/reports

Table of Contents

List of Figures & Tables

About Broadbandtrends LLC

Broadbandtrends LLC is an independent market analysis and consulting firm specializing in the coverage of service provider transformation activity across the network, business and services segments. In addition, Broadbandtrends offers unparalleled coverage on the growing impact of broadband on the digital economy.

Broadband specific coverage is focused on the ubiquitous connectivity of ultra-broadband (both fixed and mobile) infrastructure, services and regulation; Connected Home, Multiscreen/OTT video, Smart Cities and IoT. Our goal is to provide unbiased, accurate and dependable research that will help drive tangible results for our clients.

For more information about our services and experience, please visit www.broadbandtrends.com.

About the Author

Principal Analyst - Teresa Mastrangelo

Teresa Mastrangelo, Founder, brings 32 years of telecommunications experience to Broadbandtrends LLC. She is regarded as one of the leading analysts covering fixed and mobile broadband infrastructure and services along with network transformation strategies.

In her role, Teresa works in an advisory position to equipment manufacturers, service providers, financial analysts and venture capital firms to identify emerging trends, new market opportunities and advise on product positioning, market development, and business plans. Her custom work includes Competitive Assessments and Market Entry Strategies, Product Portfolio Assessments, Market Validation Studies, Webinars and White Papers.

She has been able to successfully leverage her extensive product management, product marketing and strategic planning background to bring an unmatched level of expertise to her market research and analysis.

She is an invited speaker at industry events around the world, including the Broadband World Forum in Europe and Asia, and is frequently quoted in trade and business publications such as Washington Post, San Jose Mercury, BusinessWeek, Smart Money, New York Times, Wall Street Journal, Network World, and Lightwave. In addition, she contributes blogs and articles for many publications and sites.

Prior to founding Broadbandtrends LLC, Teresa worked for RHK as the Program Director for RHK's Broadband Network Strategies program, where she had responsibility for the development of global market research and analysis of broadband infrastructure and services; as well as circuit to packet migration and VoIP. Prior to RHK, Teresa held senior level product marketing and product management with Cisco Systems, Advanced Fibre Communications (now part of Tellabs) and NEC America, and Appalachian Power as a communications engineer.

Teresa was awarded her BS in Electrical Engineering from Virginia Polytechnic Institute in 1987. Post graduate work includes The Management Institute at Roanoke College as well as executive programs at Penn State University.