



Press release (EMBARGO: 23 April 2020 14.00 CET)

### New Fibre Market Panorama 2020 data presented by FTTH Council Europe reveal:

- *Number of homes passed by fibre (FTTH/B) reaches nearly 172 million homes in EU39;*
- *France, Italy and Spain have the biggest increase in the number of homes passed;*
- *FTTH/B Coverage in Europe confirms a positive trend to nearly half of total homes;*
- *15% growth in the number of fibre subscribers;*
- *Iceland leads the European FTTH/B league table*

**Brussels, 23 April 2020** – Today the FTTH Council Europe revealed the [2020 Market Panorama](#) and the latest figures outlining fibre deployment trends in Europe prepared by [IDATE](#).

#### **Market Panorama & key findings:**

The total number of homes passed with Fibre to the Home (FTTH) and Fibre to the Building (FTTB) in the EU39<sup>1</sup> reached nearly 172 million homes compared to 160 million in 2018 with now 19 countries counting more than 2 million homes passed. The main movers in terms of homes passed in absolute numbers are France (+3,5 M), Italy (+1,9 M) and Spain (+1,5 M). The top 5 of the annual growth rates in terms of homes passed is headed by Belgium (+307%), Ireland (+70.4%), Switzerland (+69.1%), United Kingdom (+50.8%) and Germany (33.5%).

The coverage<sup>2</sup> of both FTTH and FTTB networks in September 2019 was almost 50%. By September 2019, EU39 reached a 49.9% coverage of FTTH/B networks while EU28<sup>3</sup> 39.4%, compared to respectively 46.4% and 36.4% in 2018. This shows a clear upward trend from the September 2015 figures when the coverage was at 39.8% in EU39 and 27.2% in EU28.

The number of FTTH and FTTB subscribers in Europe increased by 15.0% in EU39 since September 2018 with 70.4 million FTTH/B subscribers in September 2019. Russia still plays a major role in this increase, however, it is interesting to note that the EU28 experienced a 20.9% increase on its own.

This year<sup>4</sup>, the country adding the most subscribers is located in Western Europe. France added 1.923.000 new FTTH/B subscriptions and Spain came second adding 1.650.820 new FTTH/B subscribers. Other countries also experienced an outstanding increase in their number of subscribers such as Greece (+285%), Ireland (+185%), Switzerland (+176%), Belgium (+111%) and Italy (+45.3%).

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<sup>1</sup> The EU 39 includes Andorra, Austria, Belarus, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Kazakhstan, Latvia, Lithuania, Luxembourg, Malta, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and United Kingdom

<sup>2</sup> Coverage=Homes passed/Households

<sup>3</sup> The EU 28 includes Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

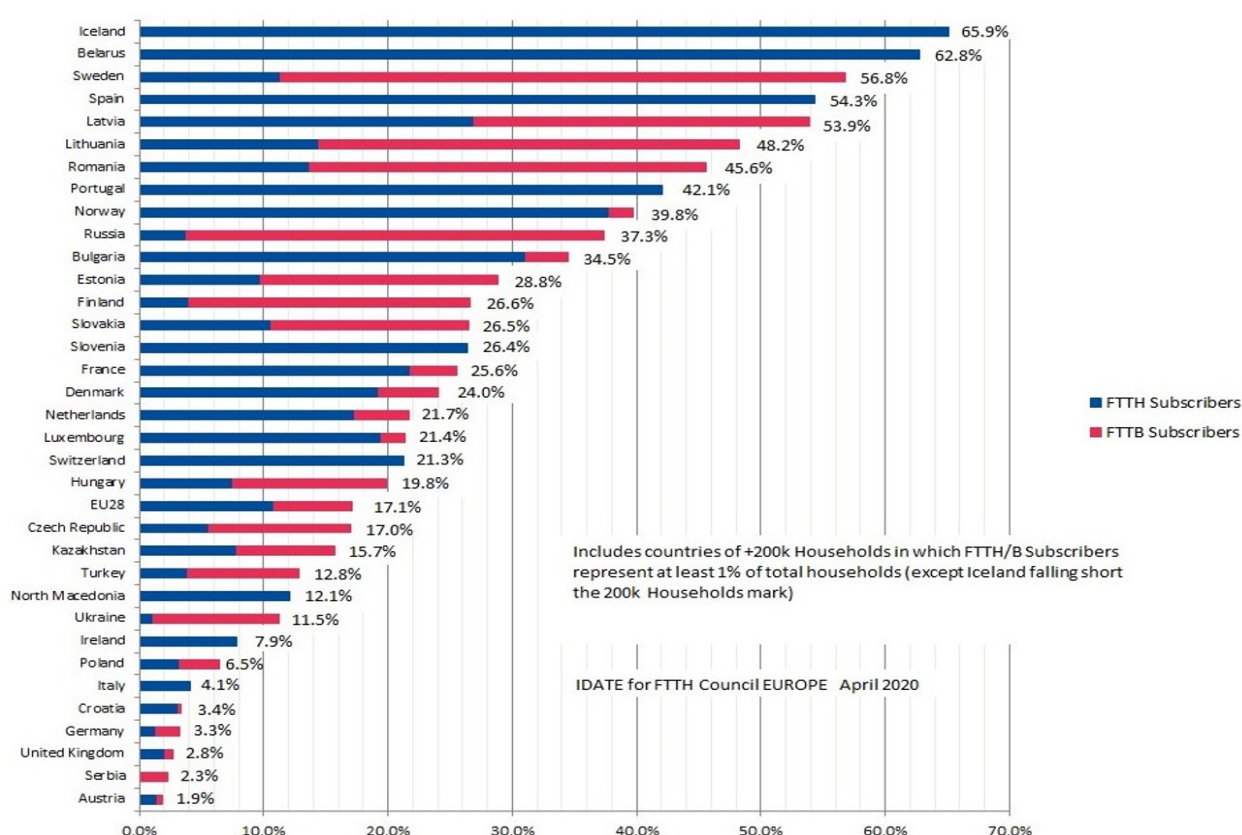
<sup>4</sup> Between September 2018 and September 2019

By September 2019, the EU39 FTTH/B take-up<sup>5</sup> rate elevated to 40.9% in comparison to the 37.4% rate registered by September 2018. **For the second consecutive year, the take-up rate for EU28 surpasses the EU39's one by reaching 43.3%** (as opposed to 38.2% in September 2018).

It is interesting to note that fibre technologies have been continuously evolving during the last few years with a predominance of FTTH architecture over FTTB (60% vs 40%). Alternative Internet Service Providers are still constituting the largest part of FTTH/B players, with a contribution of around 56% of the total fibre expansion. 41% of homes are passed by former incumbent operators. This number will also evolve as some of the latter have modified their strategy deploying more FTTH solutions, migrating from existing copper based and cable-based networks towards fibre and are even intensifying copper switch-off. The role of governments and local authorities is also increasing, either directly by signing agreements with telecom players, or via public funds.

*"Ubiquitous and reliable digital infrastructure has never played such a crucial role as today connecting families, enabling business activities and working from home. Very high capacity connectivity is not only mission critical in times of crisis but will also be fundamental for economic recovery and the transition towards a sustainable, green EU economy."* added **Erzsébet Fitori, Director General of the FTTH Council Europe**. *"Competitive investments in very high capacity networks should, therefore, remain a high political priority and we look forward to working with the EU institutions, national governments and NRAs towards removing bureaucratic and other barriers from the way of network deployment. Access to very high capacity networks faster and more cost efficiently benefits everyone!"*

## European FTTH/B Ranking



<sup>5</sup> Take-up=Subscriptions/Homes Passed

**Iceland dethrones Latvia and tops European FTTH penetration ranking with a 65,9% penetration<sup>6</sup> rate. Latvia lands fifth (53,9%).**

Iceland becomes a leader in FTTH/B, championing the ranking followed by Belarus (62,8%). Sweden (56.8%) reclaims the third position from Spain (54.3%) and assumes the last spot on the podium of fibre leaders.

It is worth mentioning that Belgium has significantly stepped up its efforts to deploy fibre with an increase of 307% in FTTH/B homes passed and of 111% in new subscribers. However, **in 2020, for the first time in years, no new country has managed to enter the FTTH/B European ranking.**

#### **Germany, country of the FTTH Conference 2020 (postponed to 1-3 December)**

In the German broadband market, FTTH/B currently represents 7% of total broadband connections. The fixed broadband market remains largely dominated by copper-based technologies (52%) and cable-based services. However, the BMVI (Ministry of Transport and Digital Infrastructure) launched a national programme that aims to build a 'Gigabit Society' in Germany by 2025.

By September 2019, Germany reached more than 4.1 million homes passed with FTTH/B and nearly 1.35 million FTTH/B subscribers. Though Germany remains quite low in the European ranking with a penetration rate of 3.3%, the number of fibre subscriptions grew by 42% (compared to 18% in September 2018) and the number of homes passed with FTTH/B by 34% (compared to 15% last year).

*"The data of this new edition of our Market Panorama confirm the trend that fibre roll-outs are taking place at an increasingly faster pace in Europe." commented **Kees de Waard, President of the FTTH Council Europe.** "The implementation of the new European Electronic Communications Code and in particular of its Very-High Capacity Networks provision will be essential to meet the ambitions of a Gigabit connected Society in Europe, of which FTTH/B networks, which are the only future-proof infrastructure, are the foundations."*

The European FTTH Ranking is available [here](#).

The full presentation about the Market Panorama delivered on 23 April 2020 is also available [here](#).

The ranking and the Market Panorama will be updated next year at the FTTH Conference 2021, whereas the FTTH/B market forecasts for 2021 and 2026 will be unveiled at the FTTH Conference 2020 in Berlin which is postponed to 1-3 December due to the outbreak of COVID-19.

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<sup>6</sup> Penetration rate = FTTH/B Subscriptions / Households

### About the FTTH Council Europe

The FTTH Council Europe is an industry organisation with a mission to accelerate ubiquitous full fibre-based connectivity empowering a leading Digital Society throughout Europe. The Council promotes this technology because it will deliver a flow of new services that enhance the quality of life, contribute to a better environment and increase economic competitiveness. The FTTH Council Europe consists of more than 150 member companies. [www.ftthcouncil.eu](http://www.ftthcouncil.eu)

The FTTH definitions of terms can be downloaded [here](#).



**Fibre to the Home**  
Council **Europe**