

New Market Panorama data at the FTTH Conference 2018: 20% growth in fibre subscribers and Ireland joins the fibre league

Valencia, 15 February 2018 – Today at the FTTH Conference 2018, the latest figures of the **FTTH Market Panorama** prepared by IDATE for the FTTH Council Europe were released. **The number of fibre to the home (FTTH) and fibre to the building (FTTB) subscribers in Europe increased by 20.4% since September 2016** with more than **51.6 million FTTH/B subscribers** in September 2017 for EU39¹. The take-up rate also soared to 34.8% for EU39 from 29.9% the previous year.

Market Panorama & key findings:

The significant increase in **new subscribers** from September 2016 to September 2017 was in Russia, which added 1,826,000 new FTTH/B subscribers. Spain also experienced a considerable growth with 1,612,371 new FTTH/B subscribers along with France which added 1,067,780 new subscribers.

The number of homes passed (homes connected with FTTH/B) in EU39 increased dramatically to reach more than 148 million representing a growth of 16% compared to September 2016. To be noted also that take-up in EU28² reached 32.4%.

The new market panorama shows that in the European region, private players (former incumbents and alternative operators) are deploying more FTTx networks (56% of the total players) in comparison to other players such as public operators and power utilities. Another notable trend is the evolution of fibre technologies over the last year, which revealed a predominance of the FTTH architecture over FTTB (55% vs 45% by September 2017).

Also of interest is that more alternative operators are deploying FTTH/B, with a contribution of about 54% of the total FTTH/B players.

Finally, a differentiation appears between the “total of homes passed” which are counted once, independently from the number of operators which cover them, and the “total of sockets deployed”, reflecting the total effort made by players to deploy their own fibre networks. The

¹ The EU 39 includes Andorra, Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, 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

² The EU 28 includes Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

Market Panorama indicates that with more numerous players investing in their own infrastructure in the recent years, it is becoming more common that two or more players reach the same specific household. France and Spain are leaders in this field. ³

Commenting on these new data, **Ronan Kelly, President of the FTTH Council** said: *“the findings of the Market Panorama are quite telling, we are now all looking towards the same goal of a fibre rich Gigabit society. We obviously commend the front-runners for their impressive and continuous progress towards FTTH/B but we are also very encouraged by the new trend of operators in countries which do not typically demonstrate a strong appetite for fibre, starting to get involved more intensively in FTTH/B projects. The structure of the market is also changing with the apparition of new types of stakeholders with innovative business models fostering infrastructure competition and making new investments.”*

FTTH Ranking

Latvia still leading the race of European FTTH penetration

Latvia is a confirmed leader in FTTH/B, championing the ranking for another year at 50.6% household penetration. Both Sweden (43.4%) and Lithuania (42.6%) remain on the podium confirming the growth from previous years.

Ireland joins the Global FTTH Ranking

This year, **Ireland** makes its entry to the Global ranking, reaching a **penetration rate of 1.7% and a take-up rate of 9.6%.**

By September 2017 and in comparison to September 2016, Ireland has increased by 73% its FTTH/B subscriber base (29,446 subscribers) and by 254% its FTTH/B Homes Passed presence in the total Irish homes (306,285 homes passed).

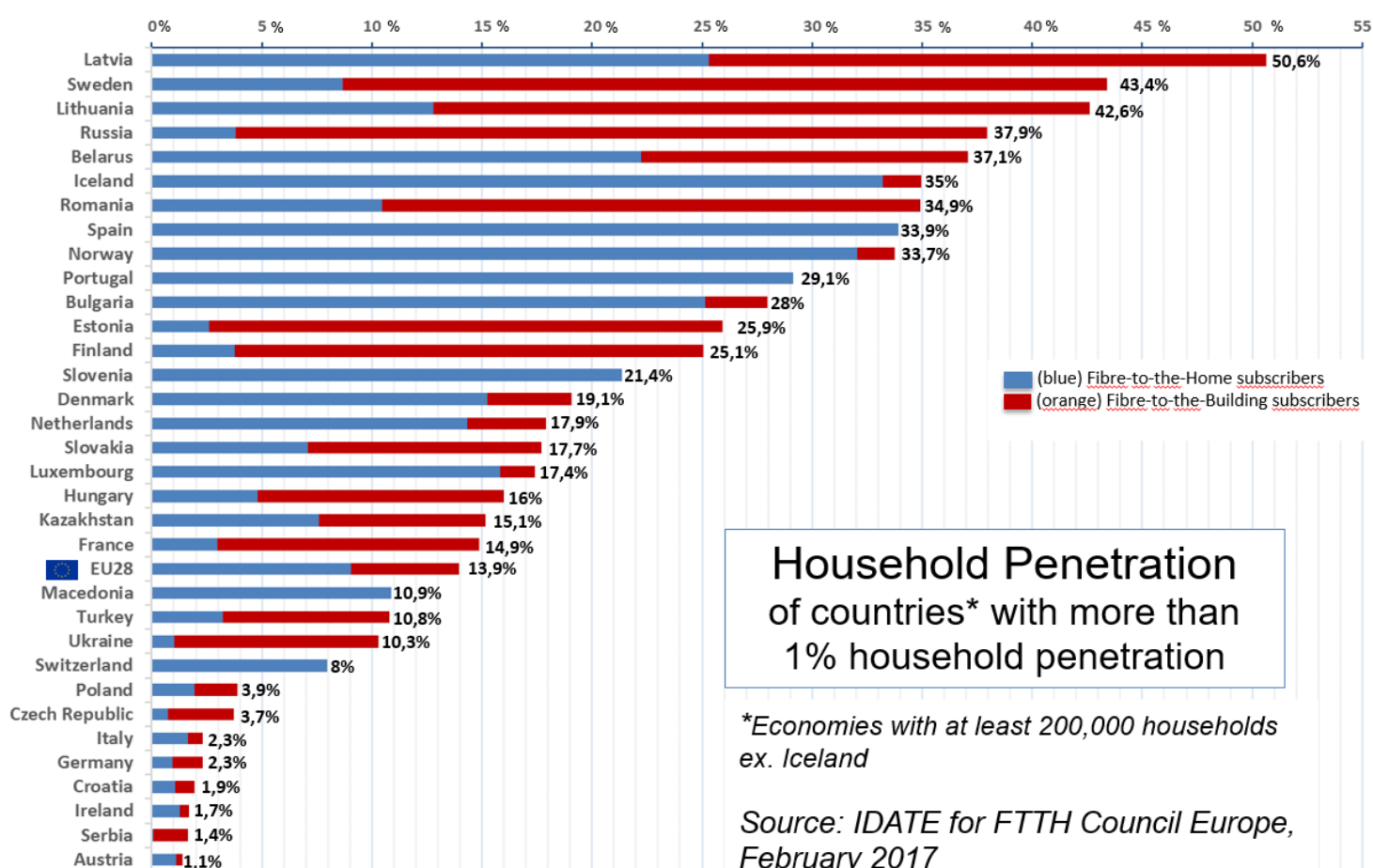
The Irish government has played a tremendous role in expanding super-fast broadband networks across all areas of Ireland, although in recent times the need for adjustment of the tools being used to promote deployment have emerged. Ireland launched a National Broadband Plan in 2012 with a view to increasing connectivity in rural areas, providing high-speed Internet services to at least 30% of premises and offering a universal broadband speed of 30 Mbps by the end of 2022. During 2017 two of the major bidders, citing challenges with the economics of the plan, withdrew from the process.

Despite this, Eir, the former incumbent operator and SIRO, the joint-venture between Vodafone and the power utility ESB are continuing their deployments of fibre access networks across the country and remain the most active investors in FTTH/B in Ireland, followed by Magnet Networks, Digiweb and Enet.

³ Players in France deployed 6 739 320 new fibre sockets between 2016 and 2017 (+31%) and Spain's 6 590 282 new FTTH/B sockets (+24%)

Spain, country of the FTTH Conference 2018

“The choice of Spain as location for the FTTH Conference 2018 is also highly symbolic” explained Erzsébet Fitori, Director General of the FTTH Council Europe, “we were eager to recognise Spain’s pivotal role as a great achiever with regard to the promotion of Very High Capacity connectivity, fibre deployment and infrastructure competition”. With around 17.5 Million Homes passed by FTTH/B and 6 Million subscribers by September 2017, Spain scores high on the Global ranking with a penetration rate of 33.9%. “The Spanish government’s policy and regulatory agenda on fibre, aligned with the objective of the Digital Agenda for Europe, and the continuous work of CNMC, the Spanish telecom regulator have played a major role in the Spanish success story” continued Erzsébet Fitori



The **Global and European FTTH Ranking** at the end of September 2017 are available [here](#)

The full presentation about the Market Panorama delivered on Thursday 15 February is also available [here](#)

Both rankings will be updated next year at the **FTTH 2019 Conference in Amsterdam RAI – 12/14 March 2019**

About the FTTH Council Europe

The FTTH Council Europe is an industry organisation with a mission to accelerate ubiquitous 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

The FTTH definitions can be downloaded from: www.ftthcouncil.eu/about-us/about-ftth/ftth-definitions

Media contact:

Aurélie Bladocha
Director Communications and Public Affairs
aurelie.bladocha@ftthcouncil.eu
Tel: +32 478 78 61 00