

Fibre deployment in Europe

The FTTH Council Europe recently revealed its 2020 Market Panorama and the latest figures outlining fibre deployment trends in Europe, prepared by IDATE.

According to the Council, the total number of homes passed with Fibre to the Home (FTTH) and Fibre to the Building (FTTB) in the EU391 reached nearly 172 million homes, compared to 160 million in 2018. This equates to nineteen countries, with more than two million homes passed. The main movers in terms of homes passed in absolute numbers are France (+3.5m); Italy (+1.9m) and Spain (+1.5m). The top five 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 of both FTTH and FTTB networks in September 2019 was almost 50%. By September 2019, the EU39 reached a 49.9% coverage of FTTH/B networks while EU28 reached 39.4%, compared respectively to 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," said the FTTH Council.

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.

This year, 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 number of subscribers such as Greece (+285%);

Ireland (+185%); Switzerland (+176%); Belgium (+111%) and Italy (+45.3%).

By September 2019, the EU39 FTTH/B take-up 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 surpassed the EU39's one by reaching 43.3% (as opposed to 38.2% in September 2018).

FTTH players

"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 still constitute the largest number of FTTH/B players, with a contribution of around 56% of 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 by 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," added the FTTH Council.

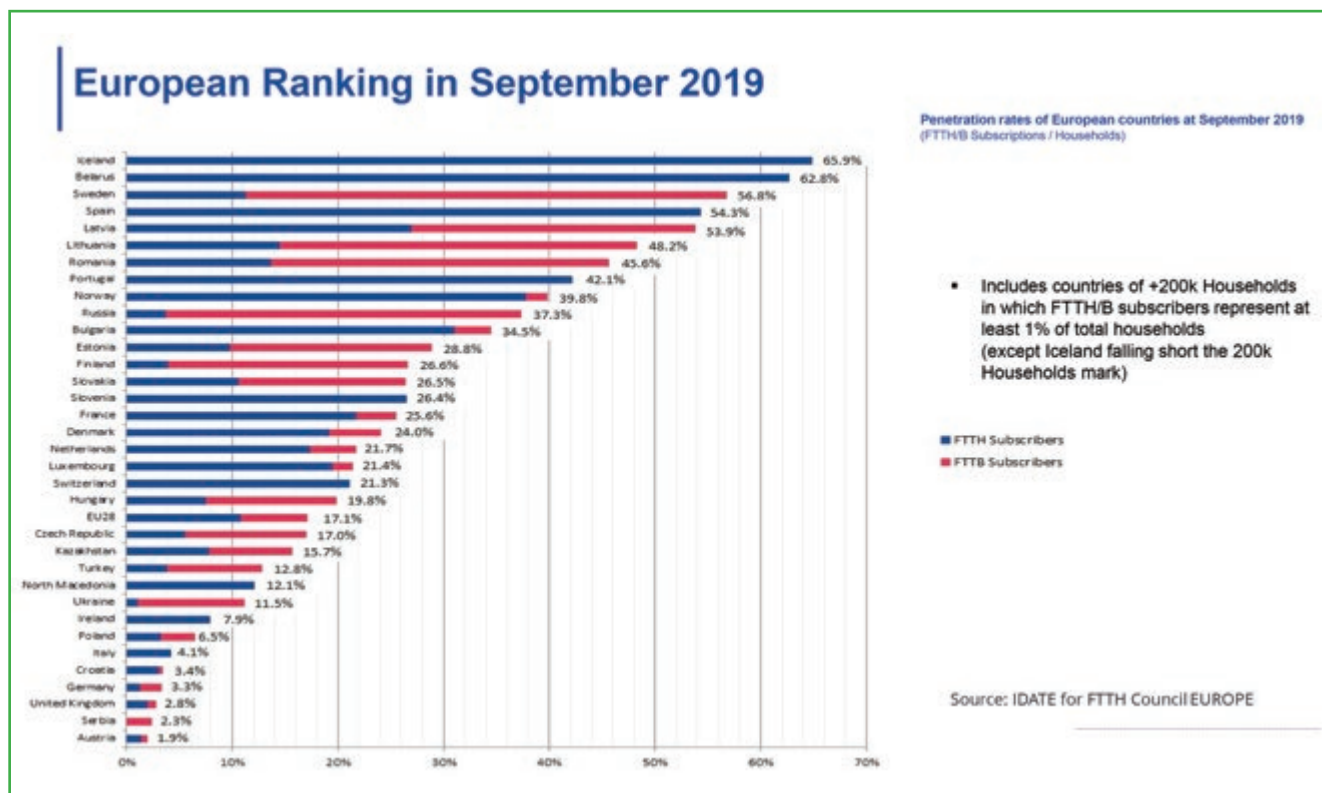
"Ubiquitous and reliable digital infrastructure has never played such a crucial role as it does today by connecting families, enabling business activities and working from home. Very high-capacity connectivity is not only mission-critical in times of crisis but will also be fundamental for economic recovery and the transition towards a sustainable, green EU economy," added Erzsébet Fitori, Director General of the FTTH Council Europe.



FTTH Conference



FTTH Conference with Erzsébet Fitori, Director General, FTTH Council Europe (on-screen and on right)



"Competitive investment 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 network deployment."

Iceland now tops European FTTH penetration rankings with a 65.9% penetration rate. Latvia is now fifth (53.9%). Iceland also leads FTTH/B, championing the ranking, followed by Belarus (62.8%). Sweden (56.8%) reclaimed third position from Spain (54.3%).

"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," concluded the FTTH Council.

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 German BMVI (Ministry of Transport and Digital Infrastructure)

has launched a national programme which 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. Although 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 FTTH/B market forecasts for 2021 and 2026 will be unveiled at the FTTH Conference 2020 in Berlin, Germany, from **1-3 December 2020** (moved to this date due to the outbreak of COVID-19). The ranking and Market Panorama will be updated next year at the FTTH Conference 2021.

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 FTTH Council Europe consists of more than 150 member companies.

For more information, see www.ftthcouncil.eu