

# FTTH/B Market Panorama in Europe

FTTH Council EUROPE



**Fibre  
to the  
Home**  
Council  
Europe



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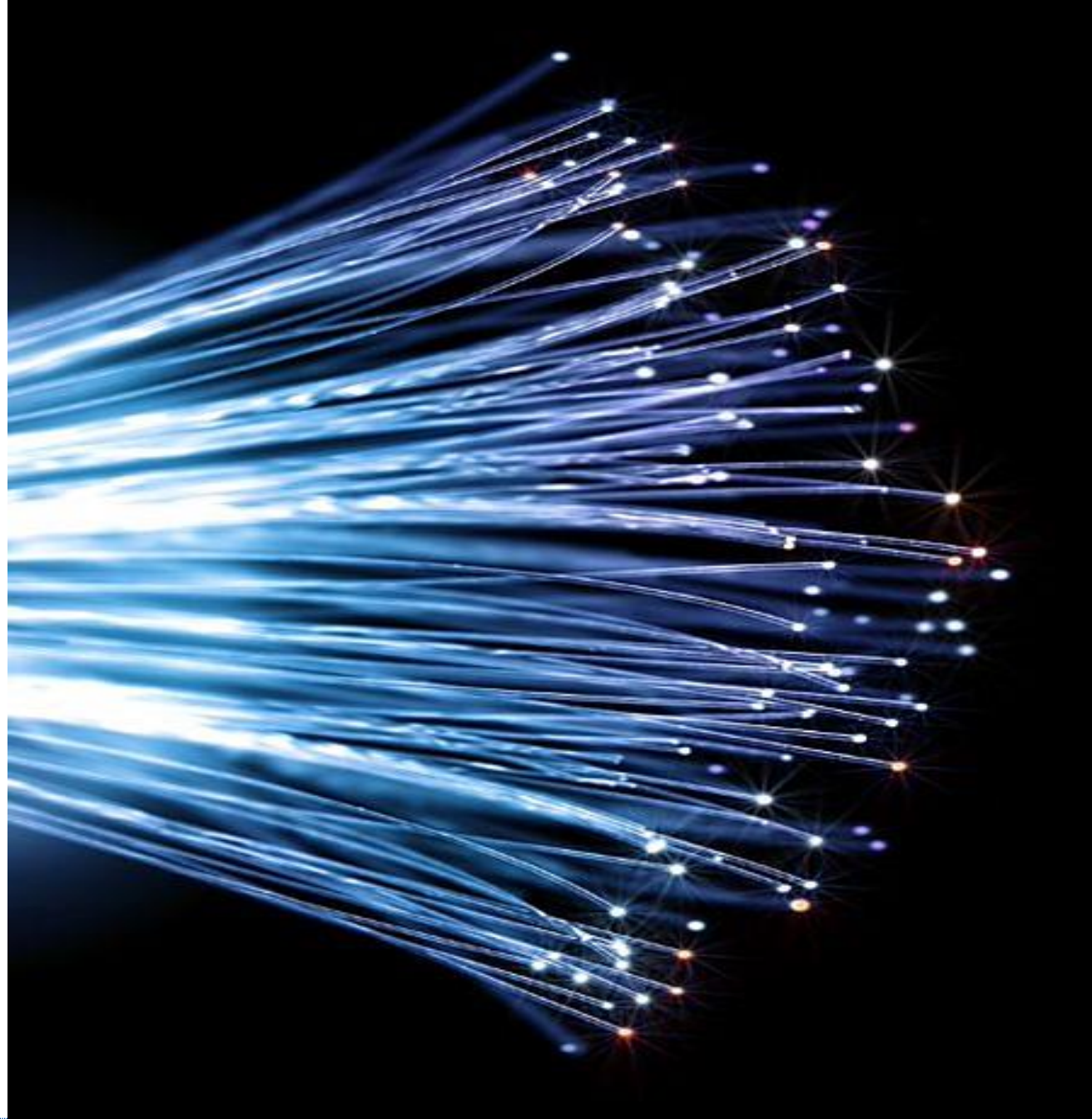
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# Agenda

1. Study Background
2. General overview and main trends
3. Who is leading the race towards full-fibre ?
4. European Ranking - September 2020
5. Key conclusions
6. Appendix

# 1

## Study Background



# Methodology

- Mission on behalf of the **FTTH Council Europe**
- Provide a complete summary of the status of FTTH/B in Europe measured during **September 2020**



# Important Definitions

## Homes Passed

Potential number of Premises which a Service Provider has capability to connect to an FTTH/FTTB network in a service area. This definition excludes premises that cannot be connected without further installation of substantial fibre plant to reach the subscriber's location.

## Sockets

Connection point of a single fibre service provider inside/outside a premises. Possibility to have multiple sockets if the location is serviced by multiple FTTH network operators in either coordinated or competitive overbuild situations.

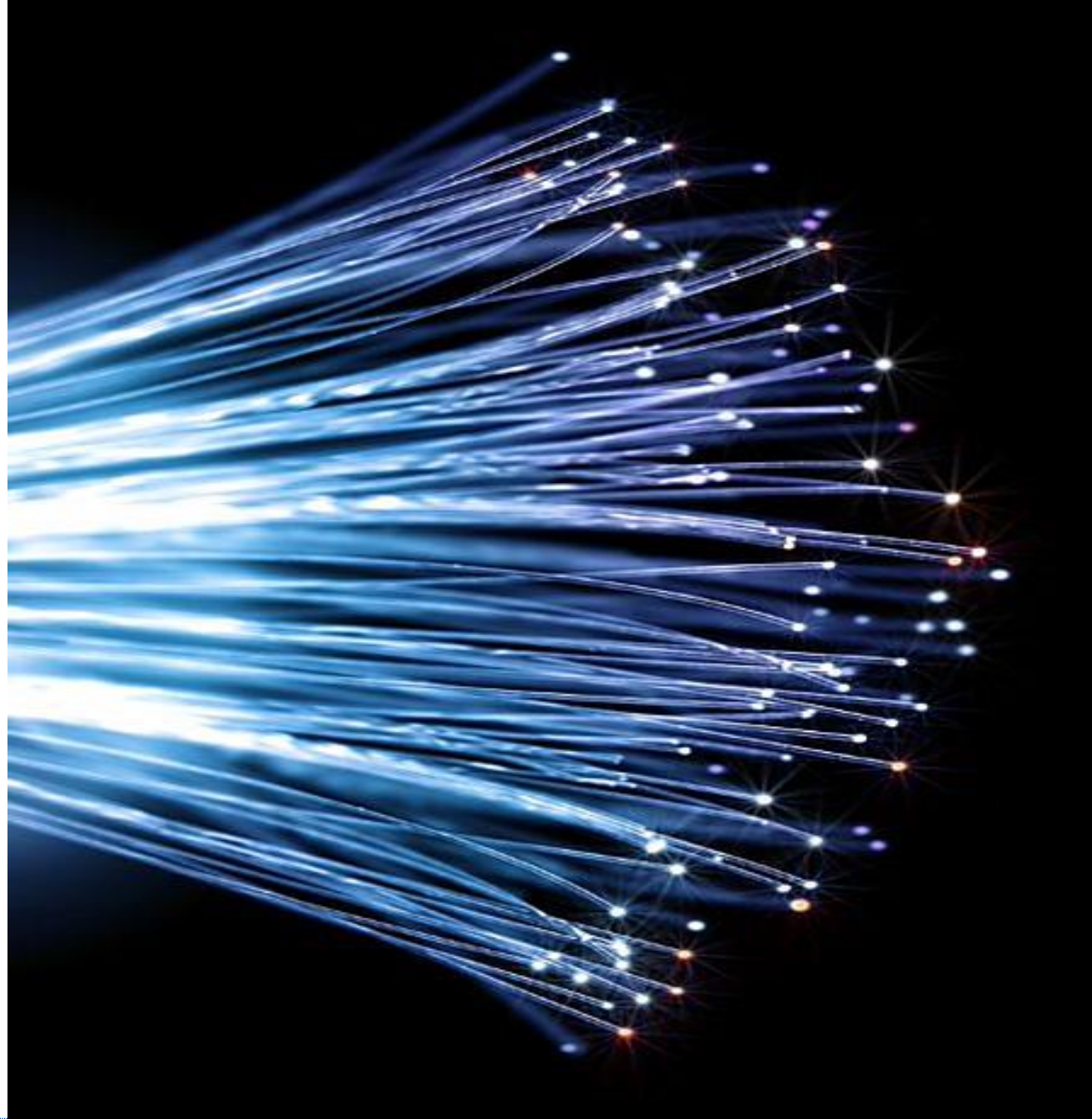
## Subscribers

Premises which are connected to a network and are already subscribed

# 2

## FTTH/B Market Panorama

General overview &  
Main trends



# FTTH/B Market Panorama

## Key Figures

FTTH/B in EU39\* countries  
September 2020 Update

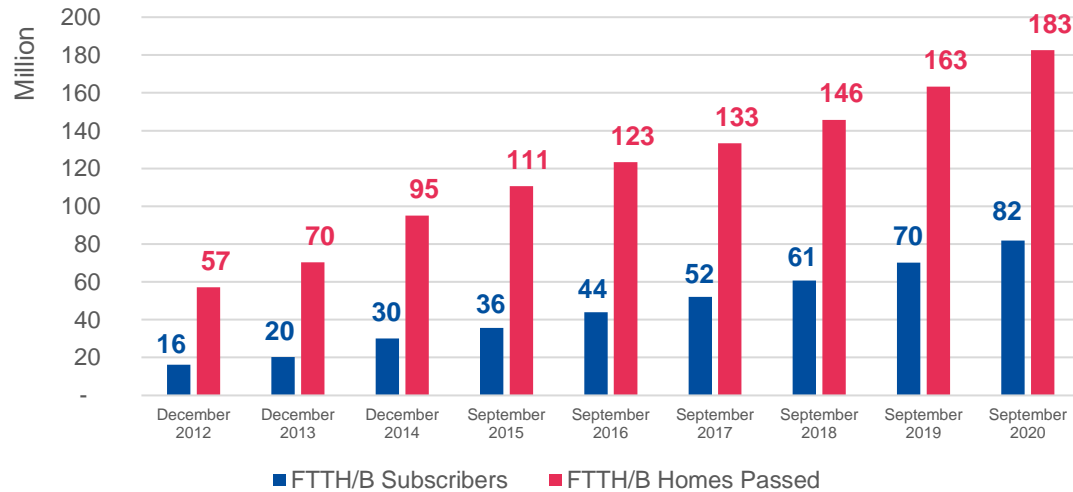
**82**

million FTTH/B  
Subscribers

**183**

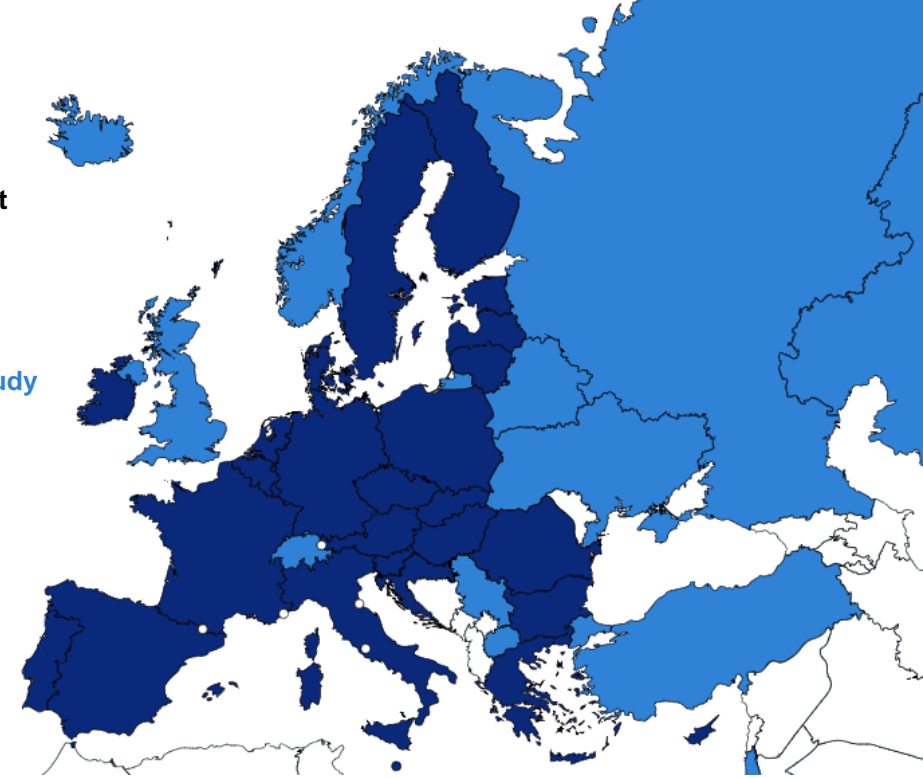
million FTTH/B  
Homes Passed

FTTH/B European market evolution (EU39)  
In terms of Homes Passed and Subscribers (2012-2020)



Detailed FTTH/B Market  
Panorama scope

- EU27 countries
- Other European countries under study



**Take-up rate**  
EU27+UK: 46.9% ( Up 3.6% )  
EU39 : 44.9% ( Up 1.9% )

**Coverage rate**  
EU27+UK: 43.8% ( Up 4.4% )  
EU39 : 52.5% ( Up 2.6% )

\* EU39 detailed composition:

- EU27 + United Kingdom
- 4 CIS countries: Belarus, Kazakhstan, Russia, Ukraine
- Iceland, Israel, North Macedonia, Norway, Serbia, Switzerland, Turkey

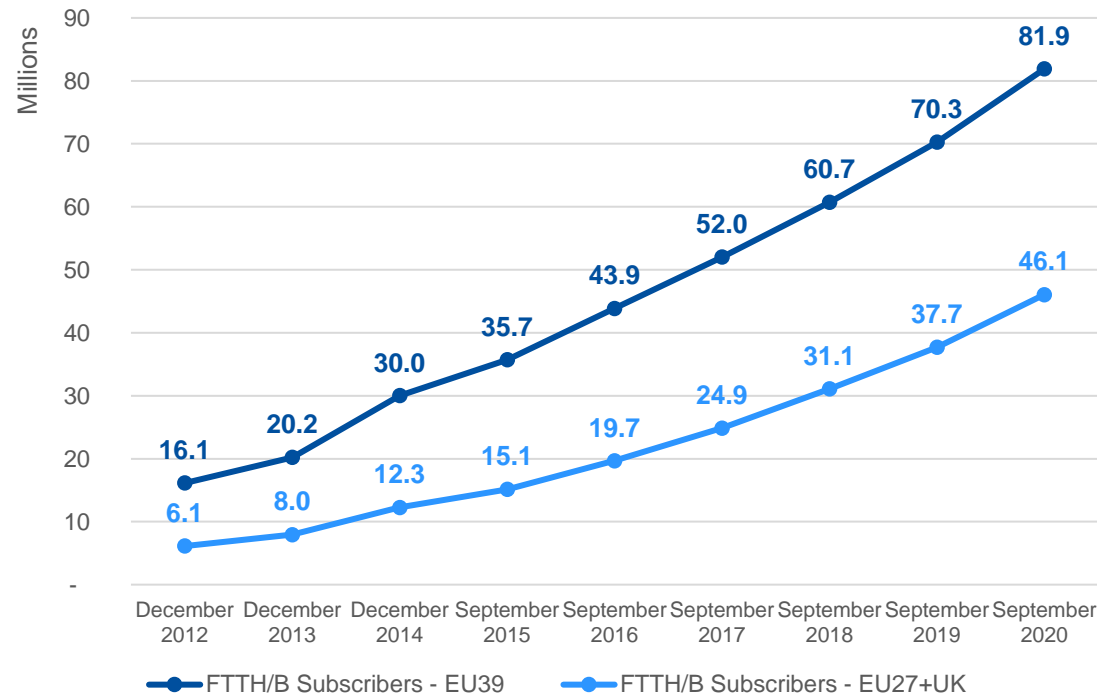
Source: IDATE for FTTH Council EUROPE

# FTTH/B Market Panorama

## Market trends (EU27+UK vs. EU39)

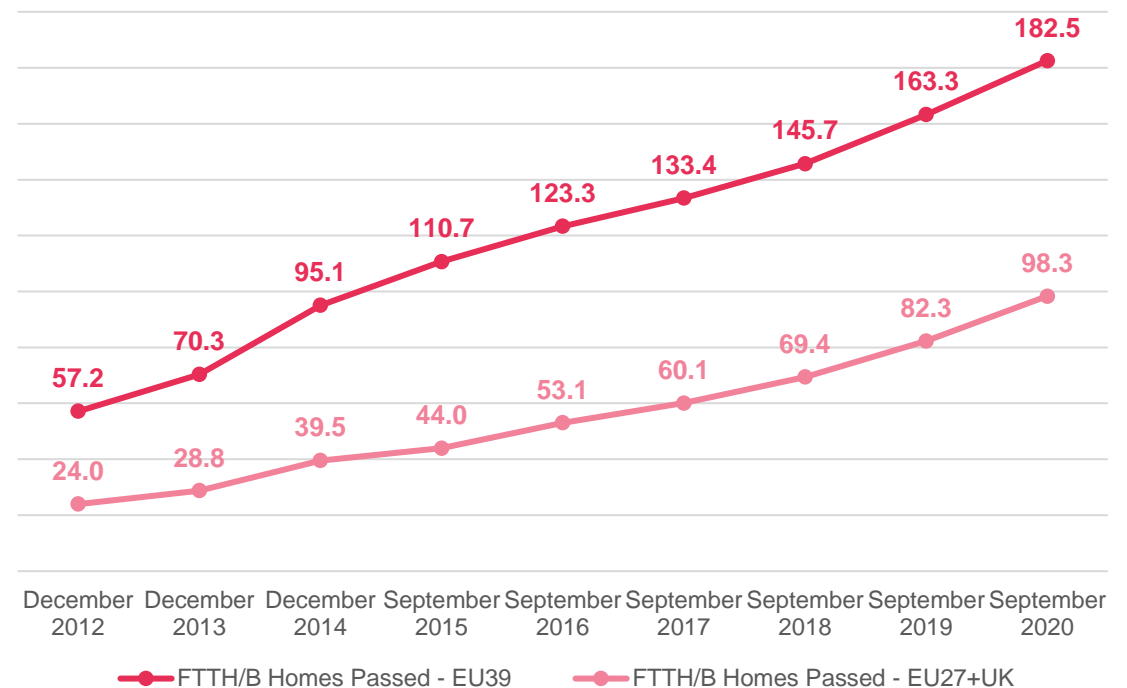
- Teleworking and need for robust connectivity during the pandemic led to increased subscription levels in the whole region (YoY)
- EU27+UK countries account for more than 56% of FTTH/B Subscriptions, an increasing trend over the years (53.7% at Sept 2019)
- With 98.3 million Homes Passed, more than half (54%) of FTTH deployments are performed inside EU27+UK countries (mainly intensified due to COVID19 pandemic)

**Evolution of FTTH/B Subscribers (million)**  
EU27+UK vs EU39 comparison



Source: IDATE for FTTH Council EUROPE

**Evolution of FTTH/B Homes Passed (million)**  
EU27+UK vs EU39 comparison



Source: IDATE for FTTH Council EUROPE

# FTTH/B Market Panorama

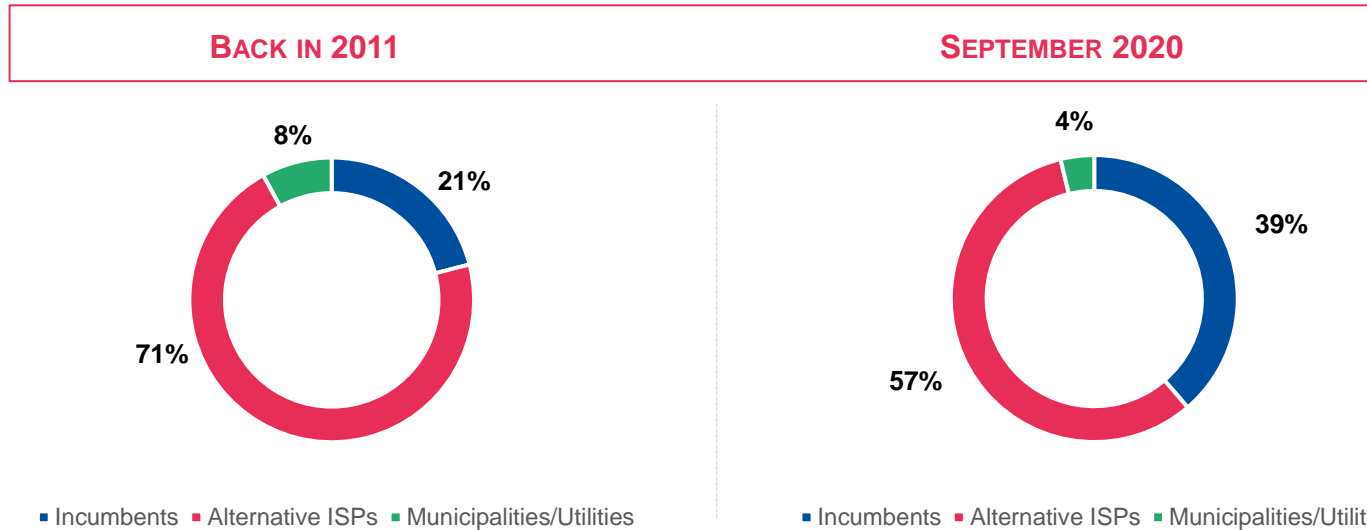
Altnets drive the FTTH race; incumbents progressively redefining their full-fibre strategies

Around 400 FTTH/B initiatives identified in EU39 by **September 2020**

- Reinforced commitment of Altnets towards FTTH expansion (e.g. in UK, Germany)
- Based on share - 39% of Connected Homes are passed by incumbents, versus 41% in 2019 – showing Altnets increasing their market share this year.
- Municipalities/utilities and alternative ISPs cover many remote and isolated areas. Further enhanced with public funds and incentives.

## Breakdown of FTTH/B Homes Passed by type of player (%)

Data comparison between Dec. 2011 and Sept. 2020



Source: IDATE for FTTH Council EUROPE

## Breakdown in terms of FTTH/B Homes Passed Top 5 European countries

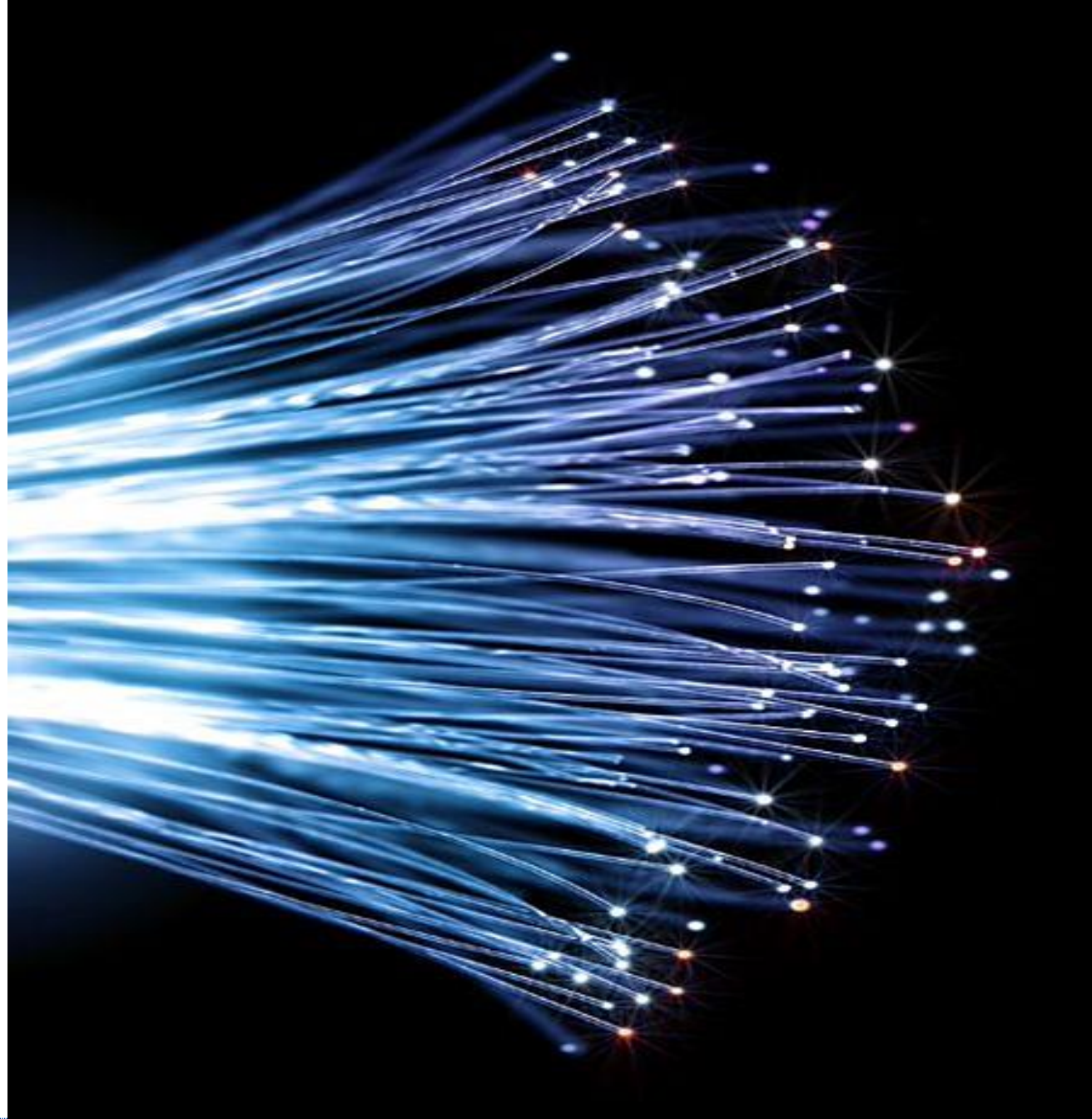


Source: IDATE for FTTH Council EUROPE

# 3

## FTTH/B Market Panorama

Who is leading the race  
towards full-fibre ?

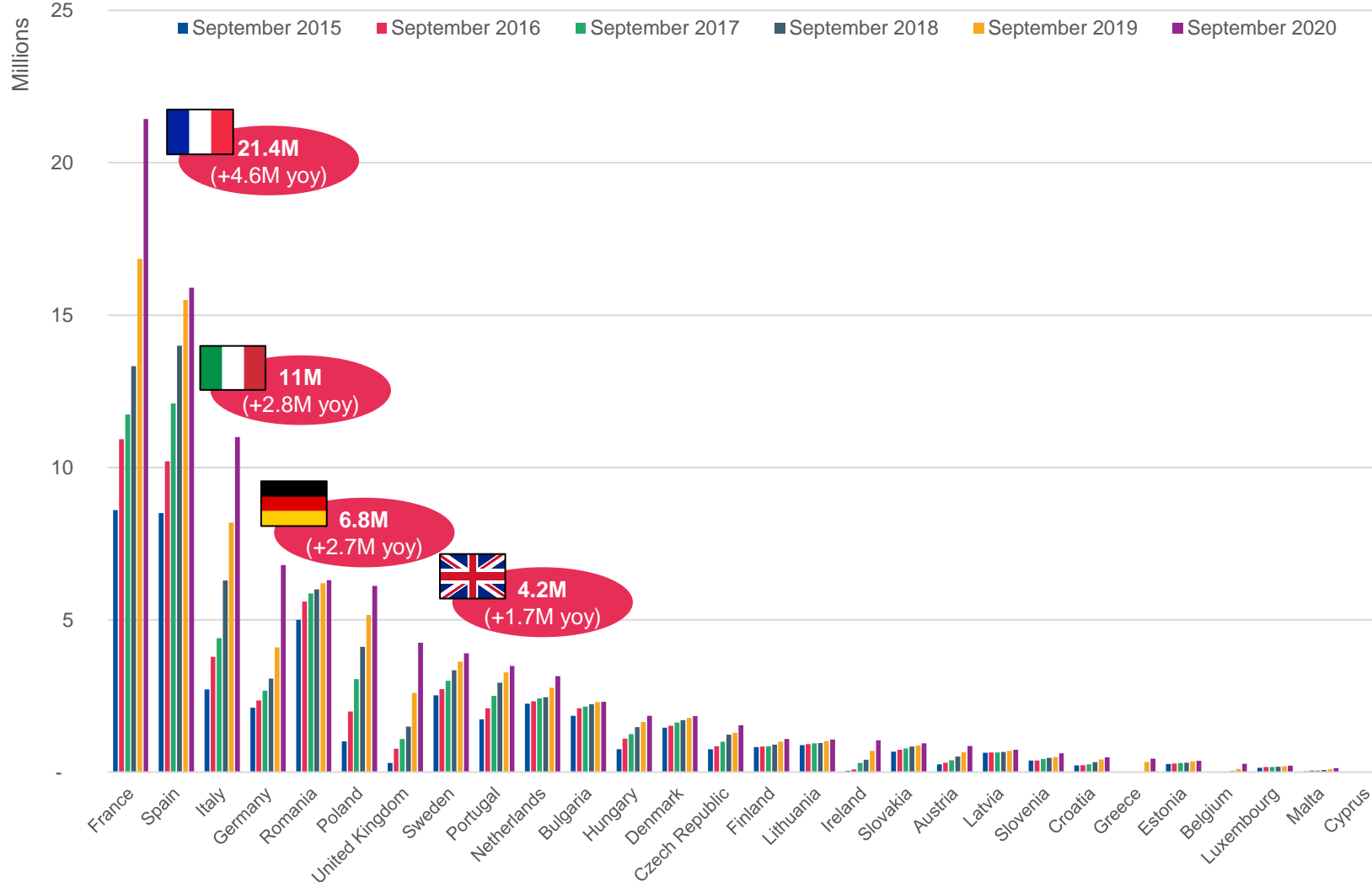


# FTTH/B Homes Passed

## EU27+UK Ranking

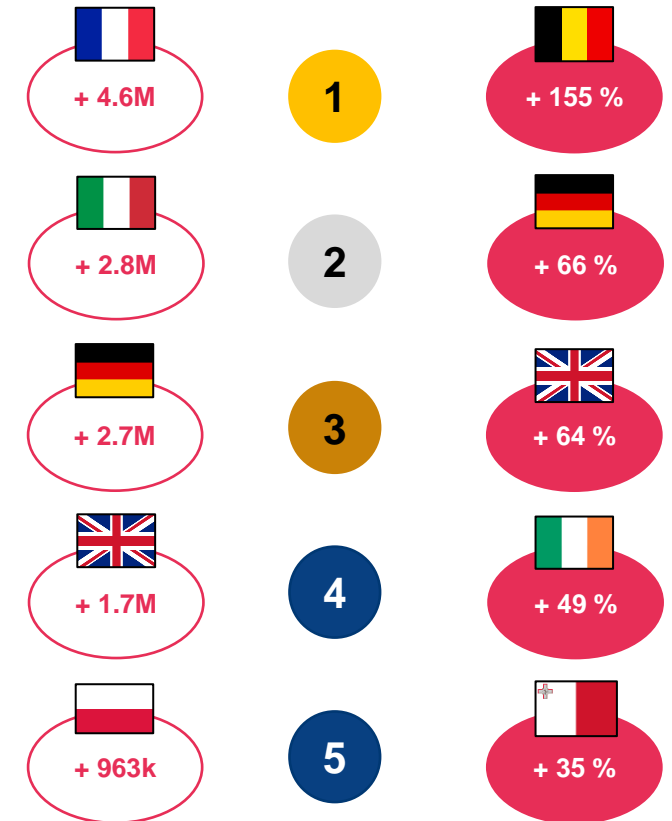
EU27+UK ranking in terms of FTTH/B Homes passed over time (in million homes)

Data comparison between Sept. 2015 and Sept. 2020



### 5 fastest growing markets in EU27+UK (in both volume and %)

Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Homes Passed)

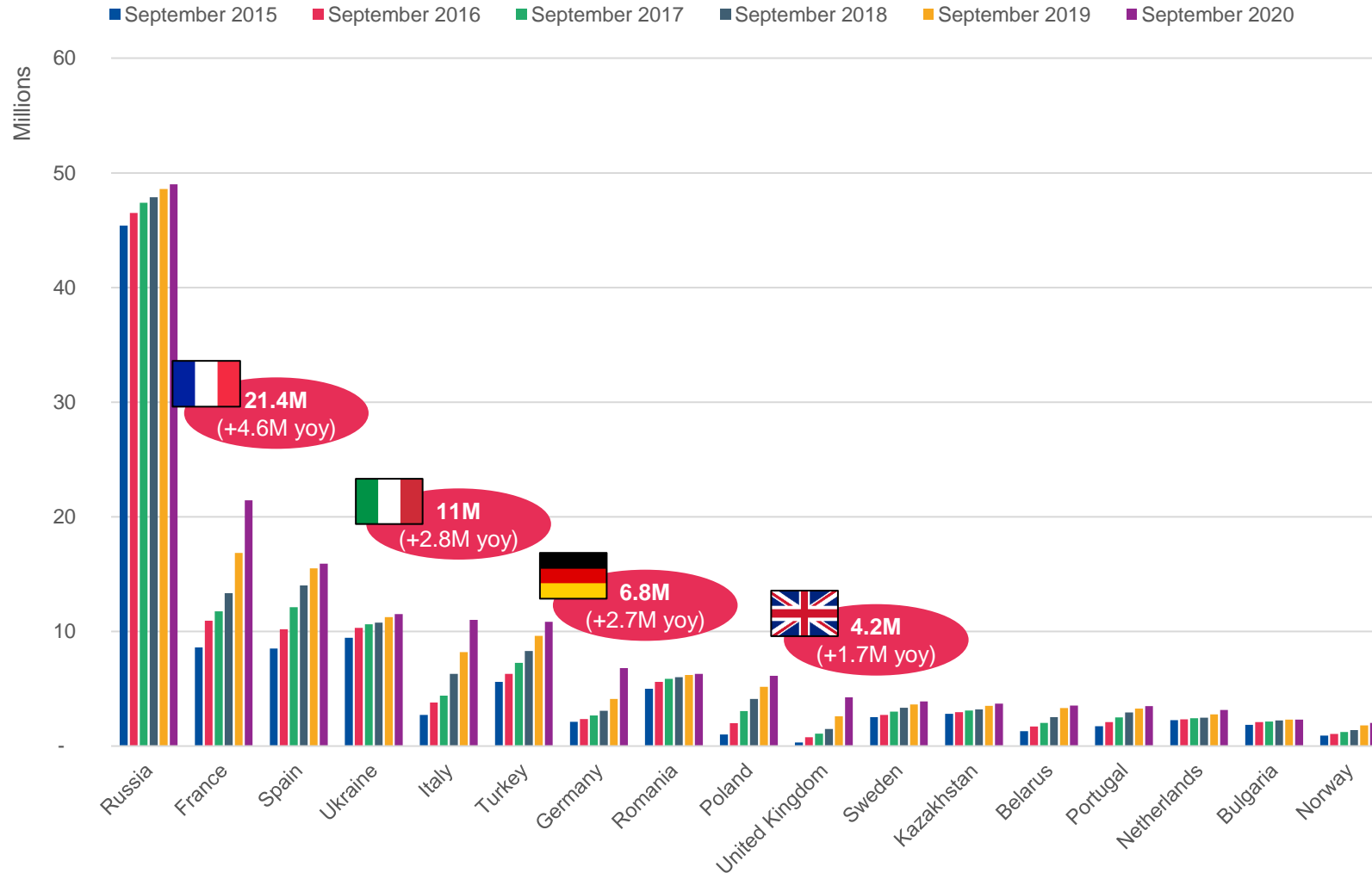


# FTTH/B Homes Passed

## EU39 Ranking

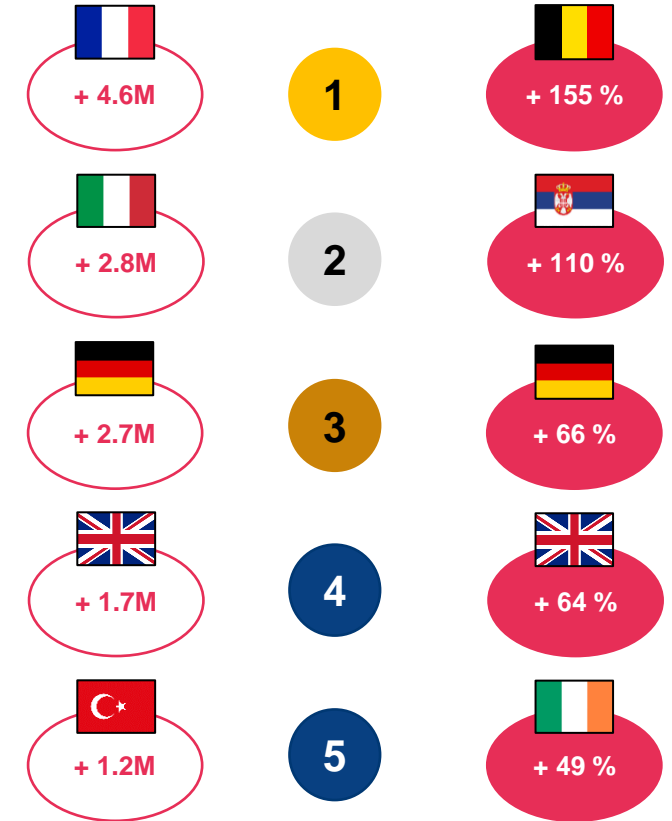
European ranking in terms of FTTH/B Homes passed, countries with > 2 million homes passed

Data comparison between Sept. 2015 and Sept. 2020 (in million homes)



5 fastest growing markets (in both volume and %)

Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Homes Passed)

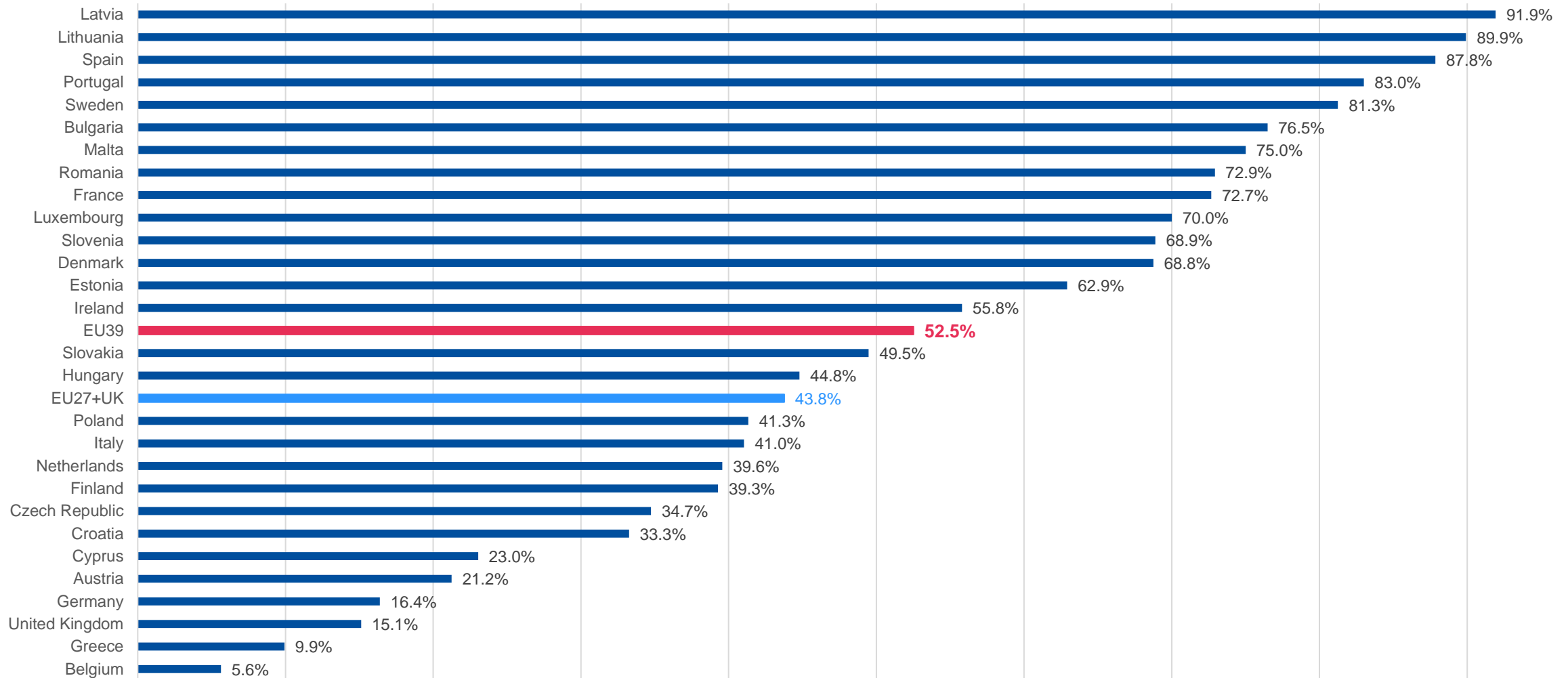


# European leaderboards – EU27+UK

Halfway there: EU27+UK – 14/28 Countries now exceeding 50% of total homes passed with Full-fibre!

## FTTH/B coverage\* in EU27+UK as of September 2020

(\* Homes passed / Households)

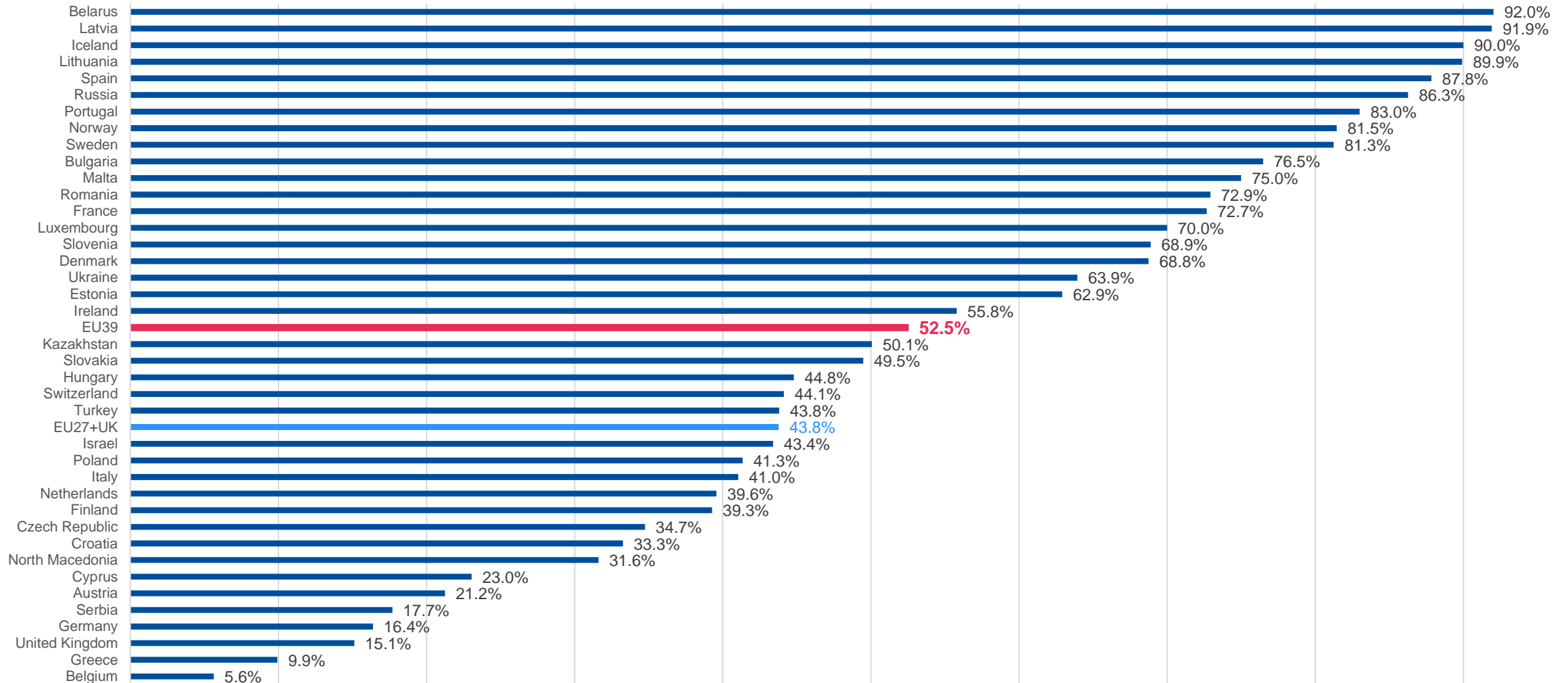


# European leaderboards – EU39

Halfway there: EU39 – 20 countries now have more than 50% of total homes with Full-fibre!

## FTTH/B coverage\* as of September 2020

(\* Homes passed / Households)



Source: IDATE for FTTH Council EUROPE

# FTTH/B Coverage

## Summary map

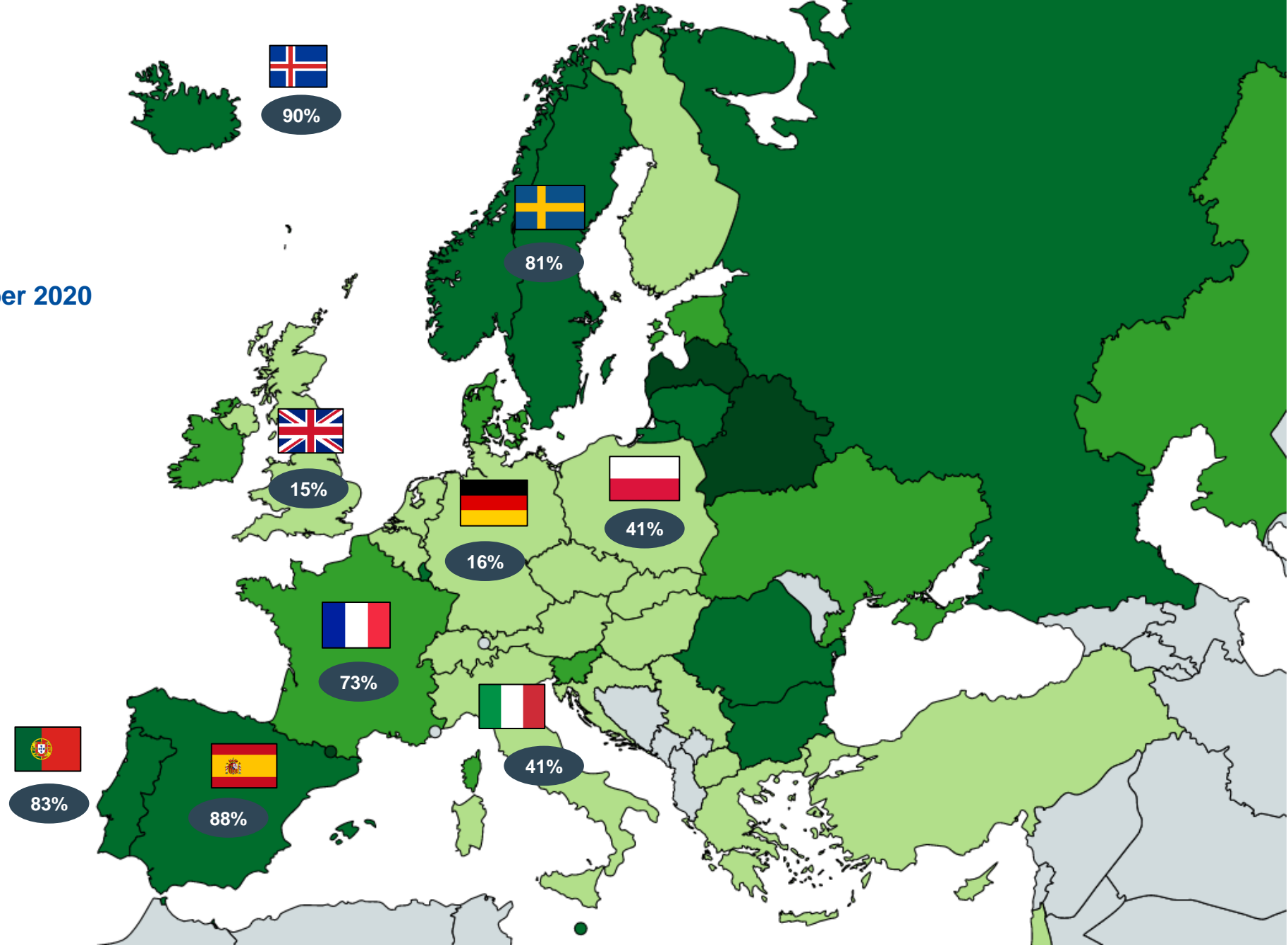
### FTTH/B coverage\* map - September 2020

(\* Homes passed / Households)

- FTTH/B coverage > 90%
- FTTH/B coverage 75 – 90 %
- FTTH/B coverage 50 – 75 %
- FTTH/B coverage < 50 %

#### Coverage rate

EU27+UK: 43.8% ( Up 4.4% )  
EU39 : 52.5% ( Up 2.6% )

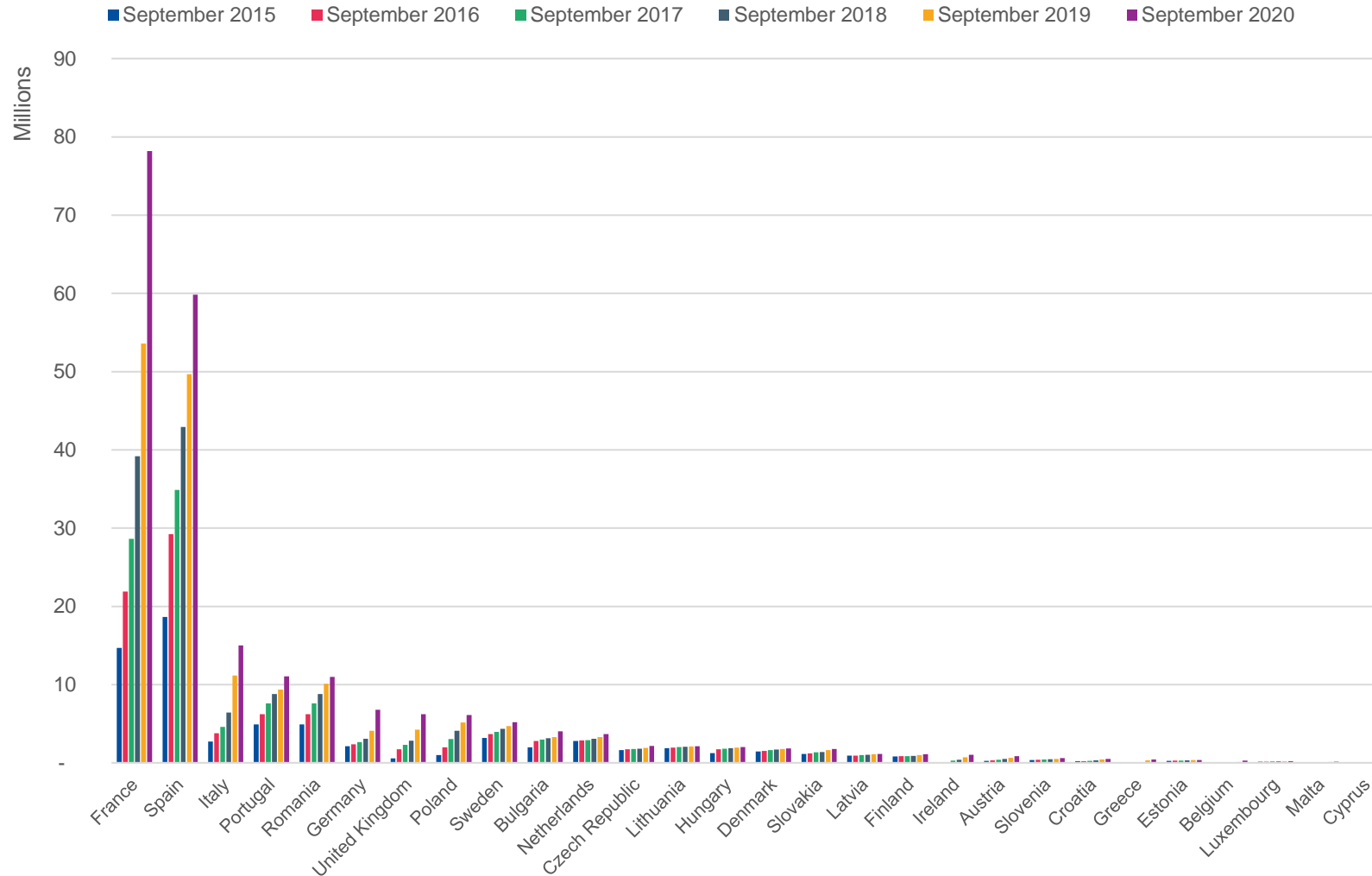


# FTTH/B Sockets Deployed\*

## EU27+UK Ranking

### EU27+UK ranking in terms of FTTH/B Sockets deployed over time (in million homes)

Data comparison between Sept. 2015 and Sept. 2020



### 5 fastest growing markets (in volume and in %)

Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Sockets Deployed)



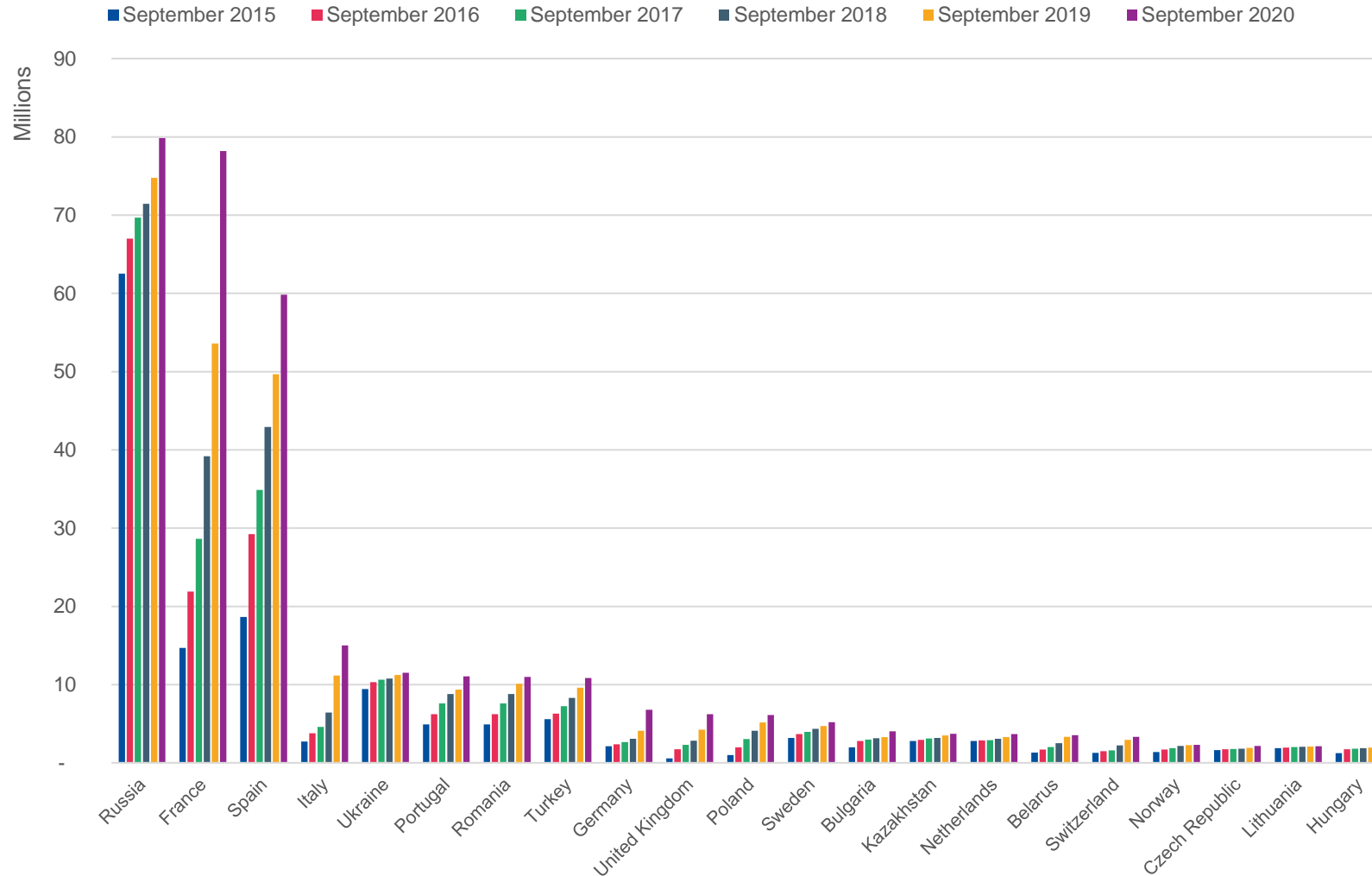
\***FTTH/B Sockets Deployed:** The connection point of a single fibre service provider inside/outside a premises. Multiple sockets are counted if the location is serviced by multiple FTTH network operators.

# FTTH/B Sockets Deployed\*

## EU39 Ranking

### European ranking in terms of FTTH/B Sockets deployed, countries with > 2 million sockets deployed

Data comparison between Sept. 2015 and Sept. 2020 (in million)



### 5 fastest growing markets (in volume and in %)

Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Sockets Deployed)

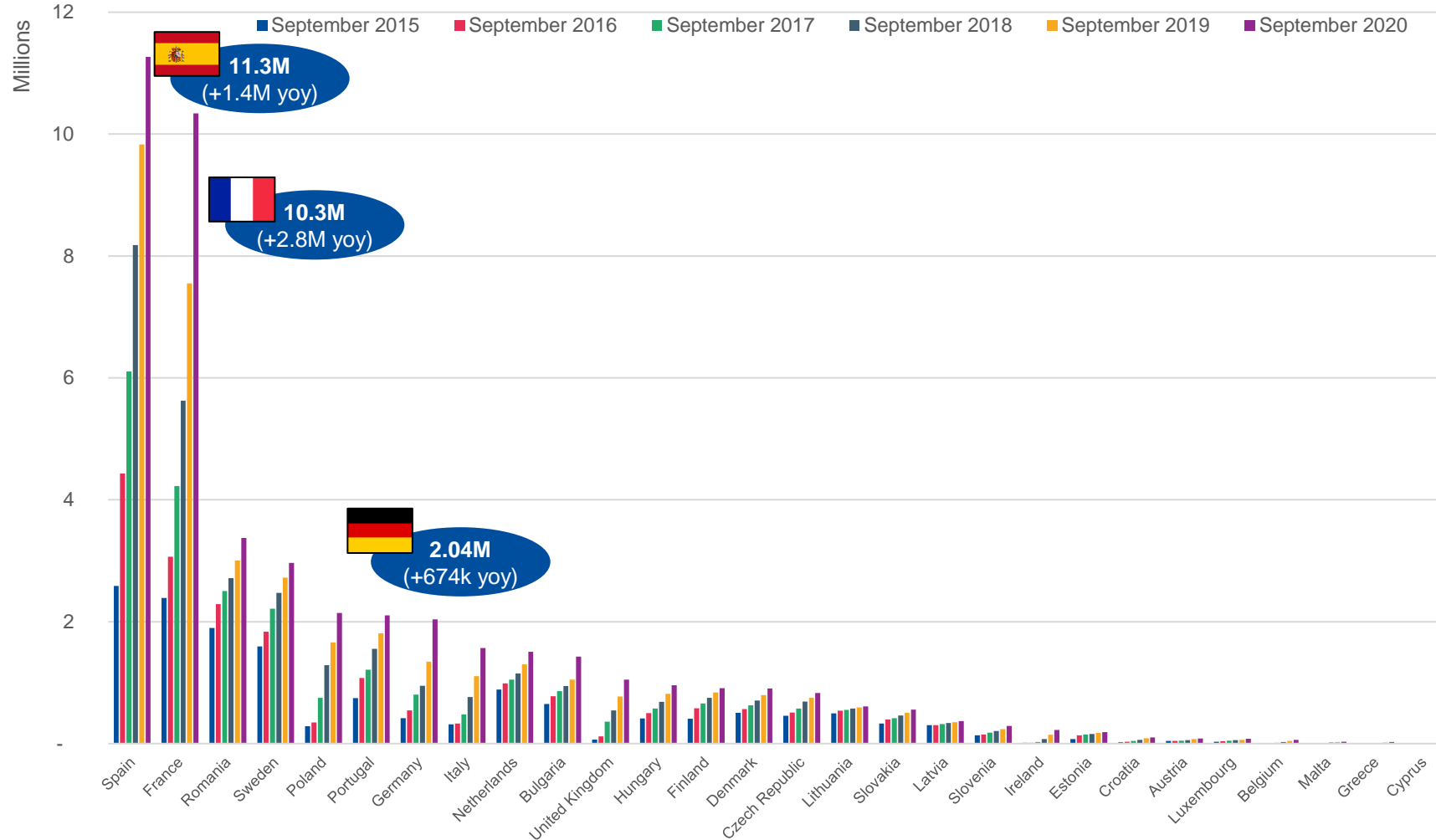


\***FTTH/B Sockets Deployed:** The connection point of a single fibre service provider inside/outside a premises. Multiple sockets are counted if the location is serviced by multiple FTTH network operators.

# FTTH/B Subscribers

## EU27+UK Ranking

EU27+UK ranking in terms of FTTH/B Subscriptions over time (in million homes)  
Data comparison between Sept. 2015 and Sept. 2020



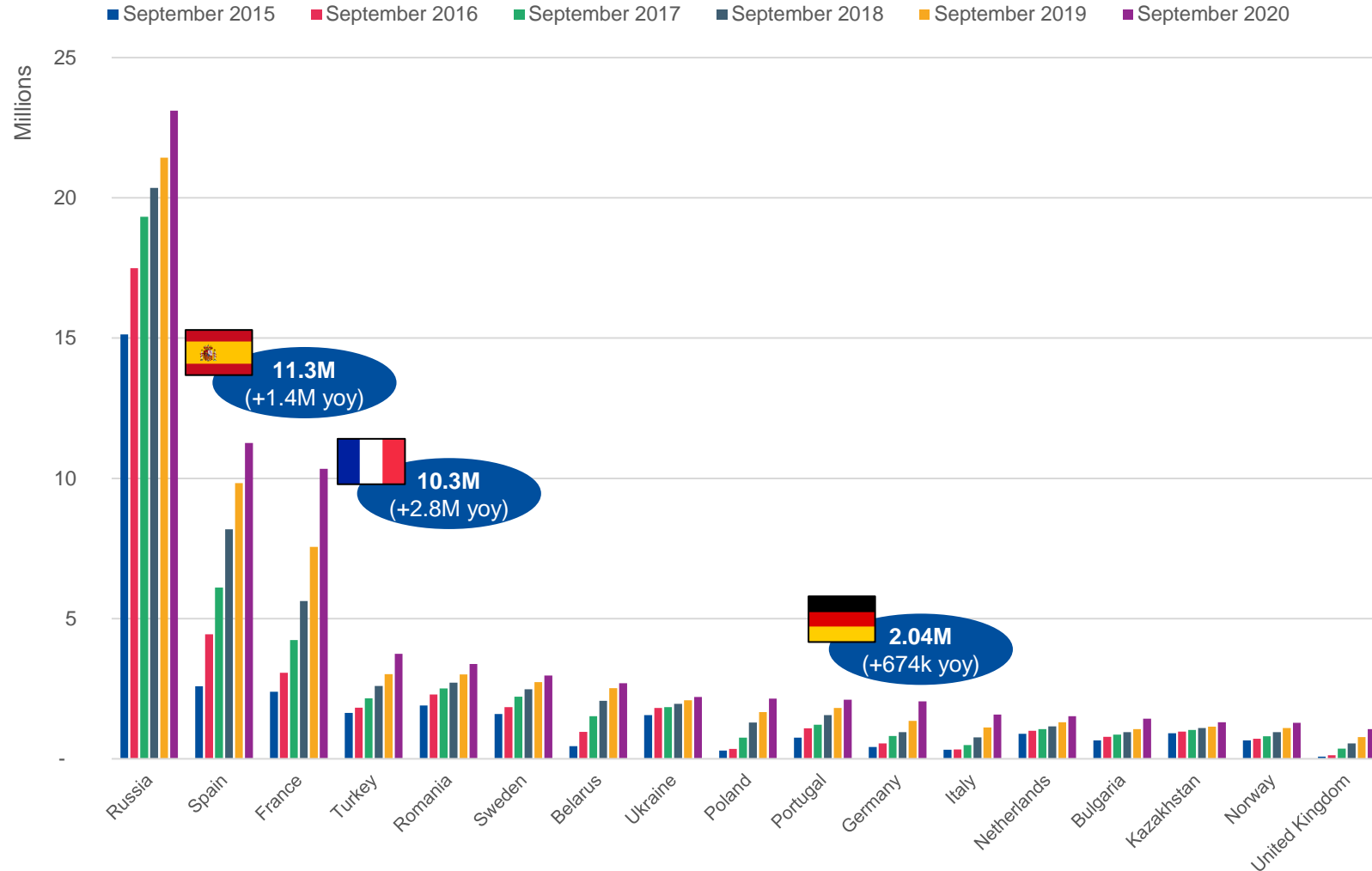
5 fastest growing markets (in volume and in %)  
Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Subscribers)



# FTTH/B Subscribers

## EU39 Ranking

European ranking in terms of FTTH/B Subscriptions over time, countries with > 1 million subscriptions  
Data comparison between Sept. 2015 and Sept. 2020 (in million)



5 fastest growing markets (in volume and in %)  
Data from Sept. 2019 to Sept. 2020 (in terms of FTTH/B Subscribers)



# FTTH/B Take-up

## Summary map

### FTTH/B take-up\* map - September 2020

(\* Homes passed / Households)

- FTTH/B take-up > 50%
- FTTH/B take-up 40 – 50 %
- FTTH/B take-up 30 – 40 %
- FTTH/B take-up < 30 %

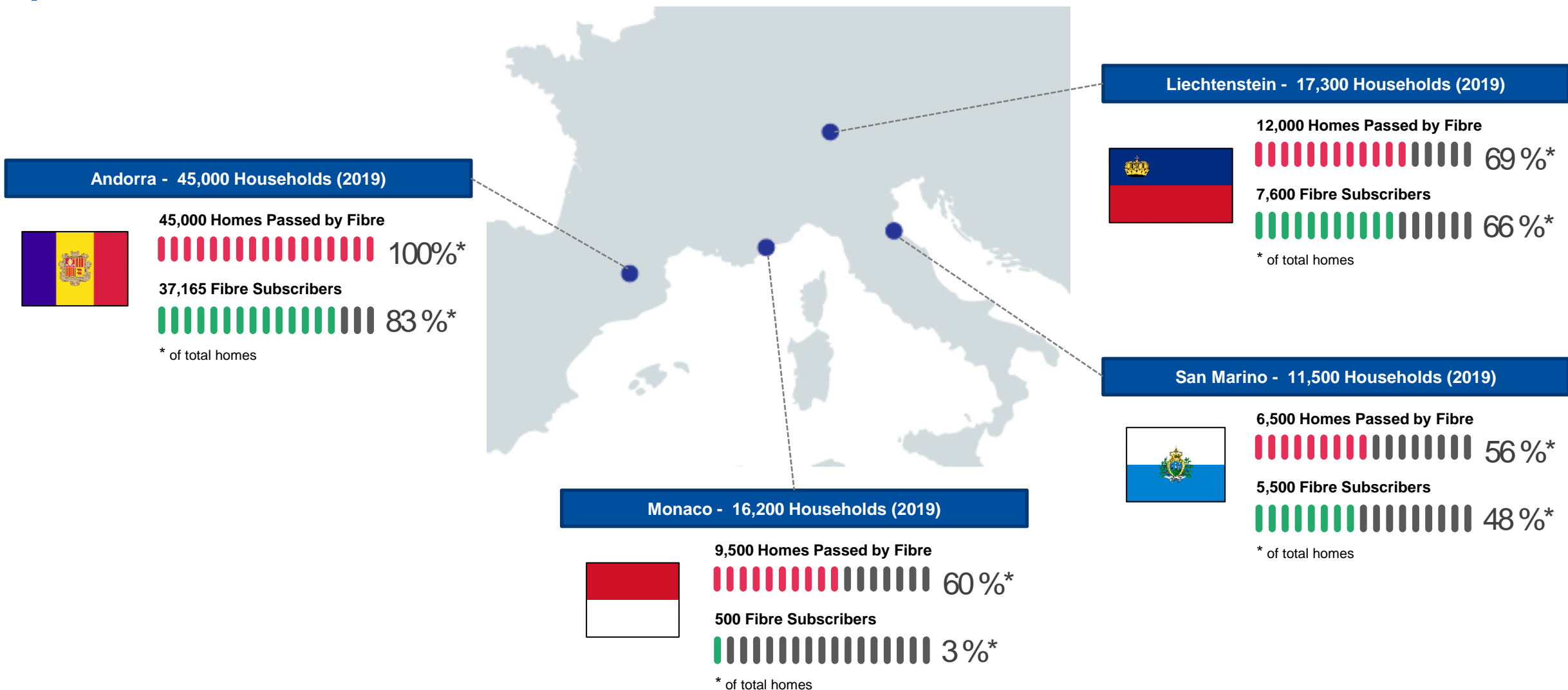
#### Take-up rate

EU27+UK: 46.9% ( Up 3.6% )  
EU39 : 44.9% ( Up 1.9% )



# Focus on microstates progress

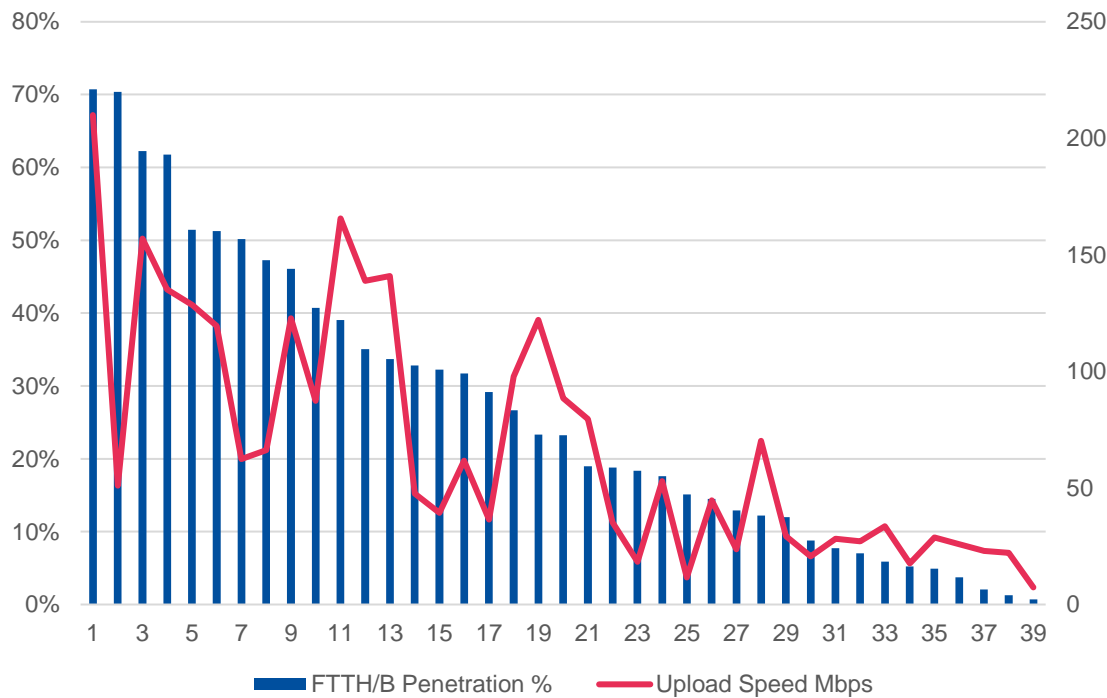
## Summary



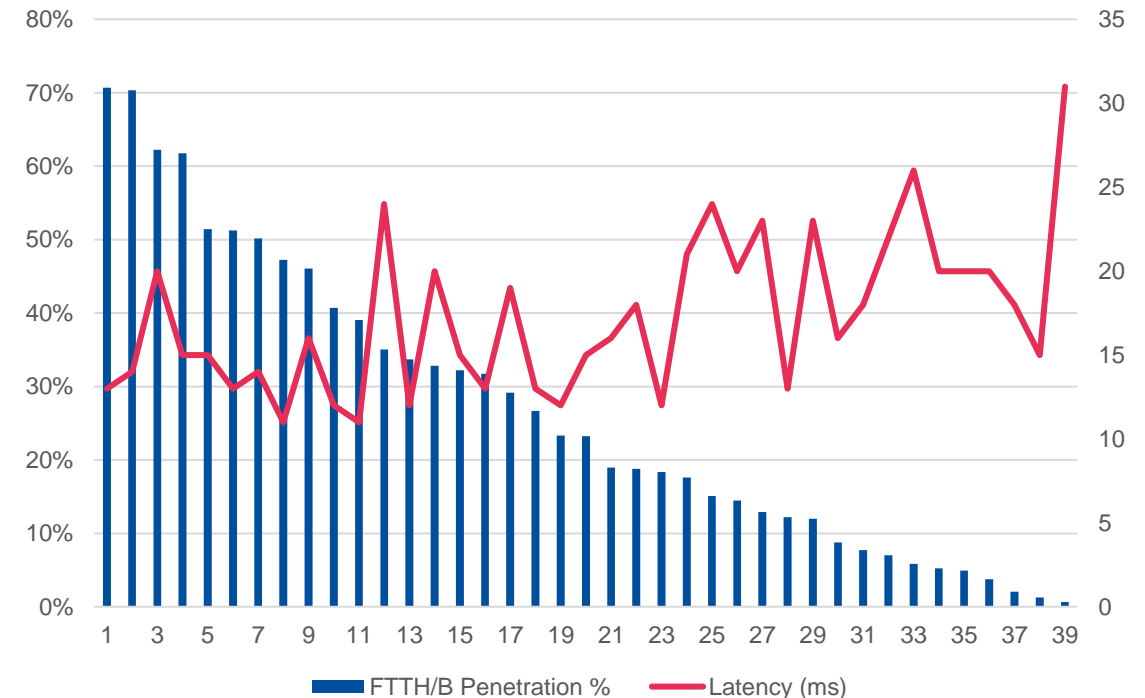
# Fibre improves customer experience

- Full-fibre connectivity is designed for residential usage to support an increasing demand for bandwidth-intensive services (such as TV and video)
- Fibre is also a key enabler for businesses, facilitating Working From Home (WFH) situations, joining reliable connectivity with higher upload bandwidth and reduced latency.
- This supports video-conferencing, cloud-based services and other real-time or bandwidth hungry applications now in demand.

**FTTH/B Penetration alongside Ookla Global Index - Fixed Upload Bandwidth**



**FTTH/B Penetration alongside Ookla Global Index - Latency**

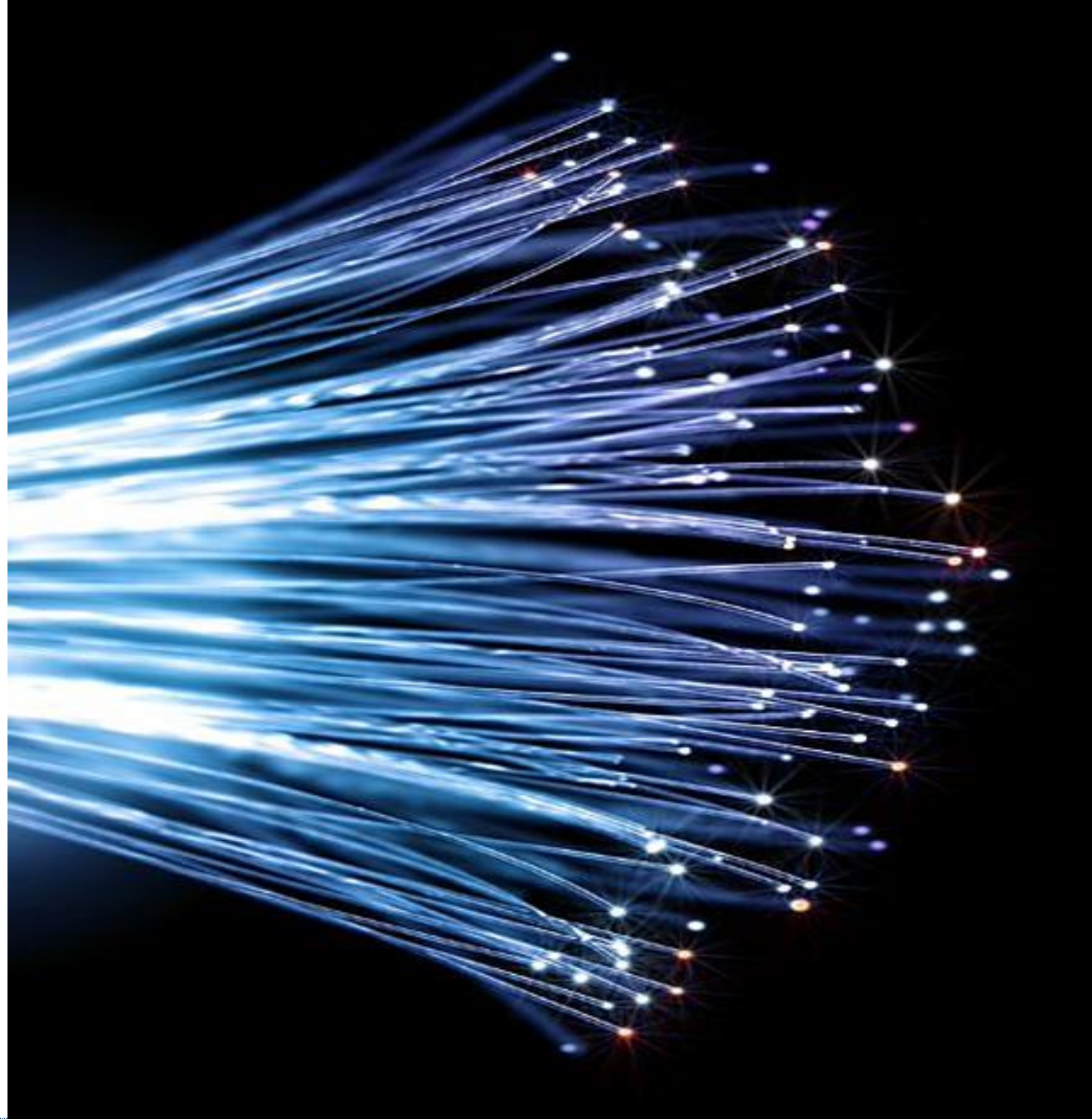


Sources: IDATE for FTTH Council EUROPE  
Ookla Speedtest Global Index March 2021

# 4

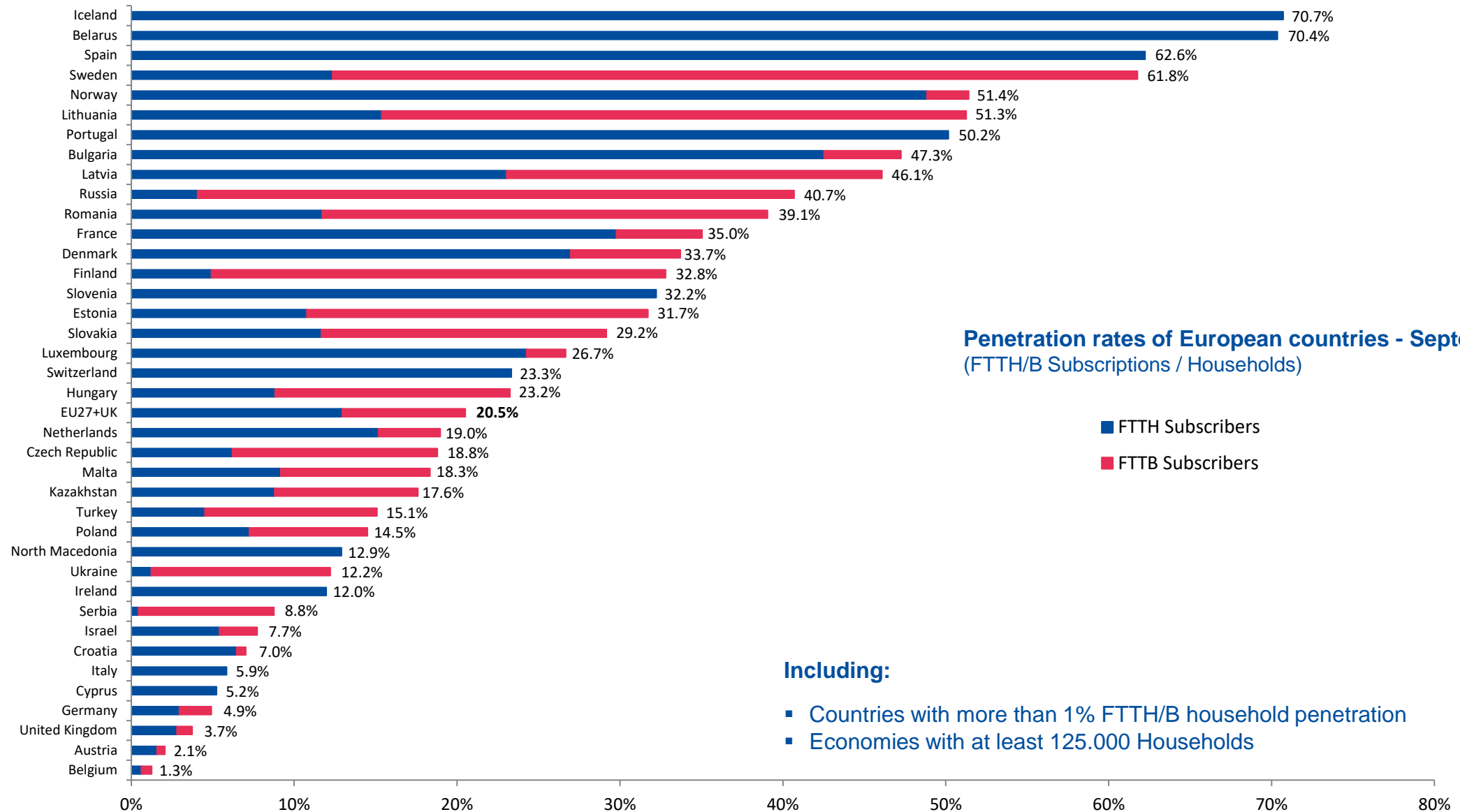
## FTTH/B Market Panorama

European Ranking  
September 2020



# European Ranking

## FTTH/B Markets - September 2020



Penetration rates of European countries - September 2020  
(FTTH/B Subscriptions / Households)

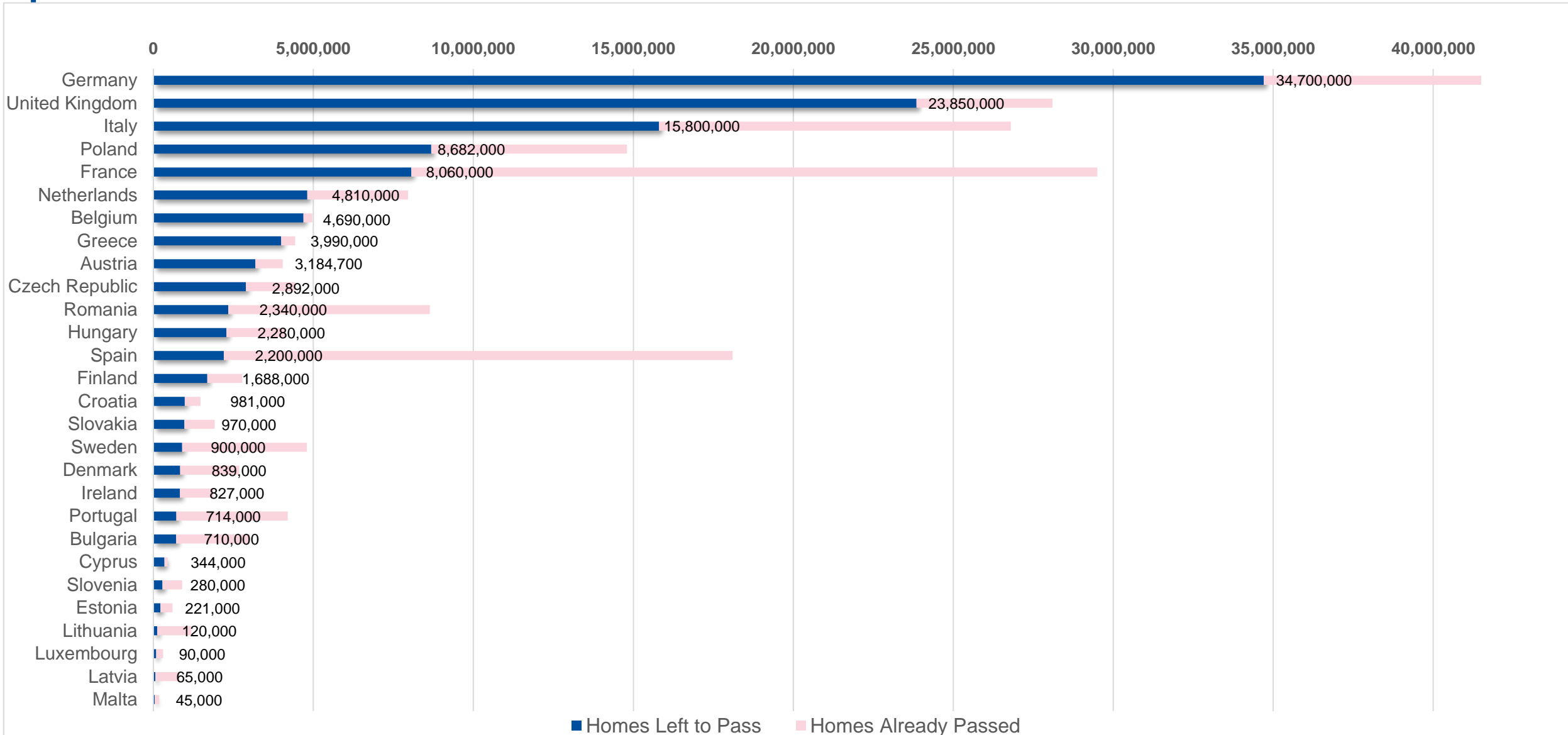
■ FTTH Subscribers  
■ FTTB Subscribers

### Including:

- Countries with more than 1% FTTH/B household penetration
- Economies with at least 125.000 Households

# European Ranking – EU27+UK

## The Road to Full Fibre – Who has the most work left to do?

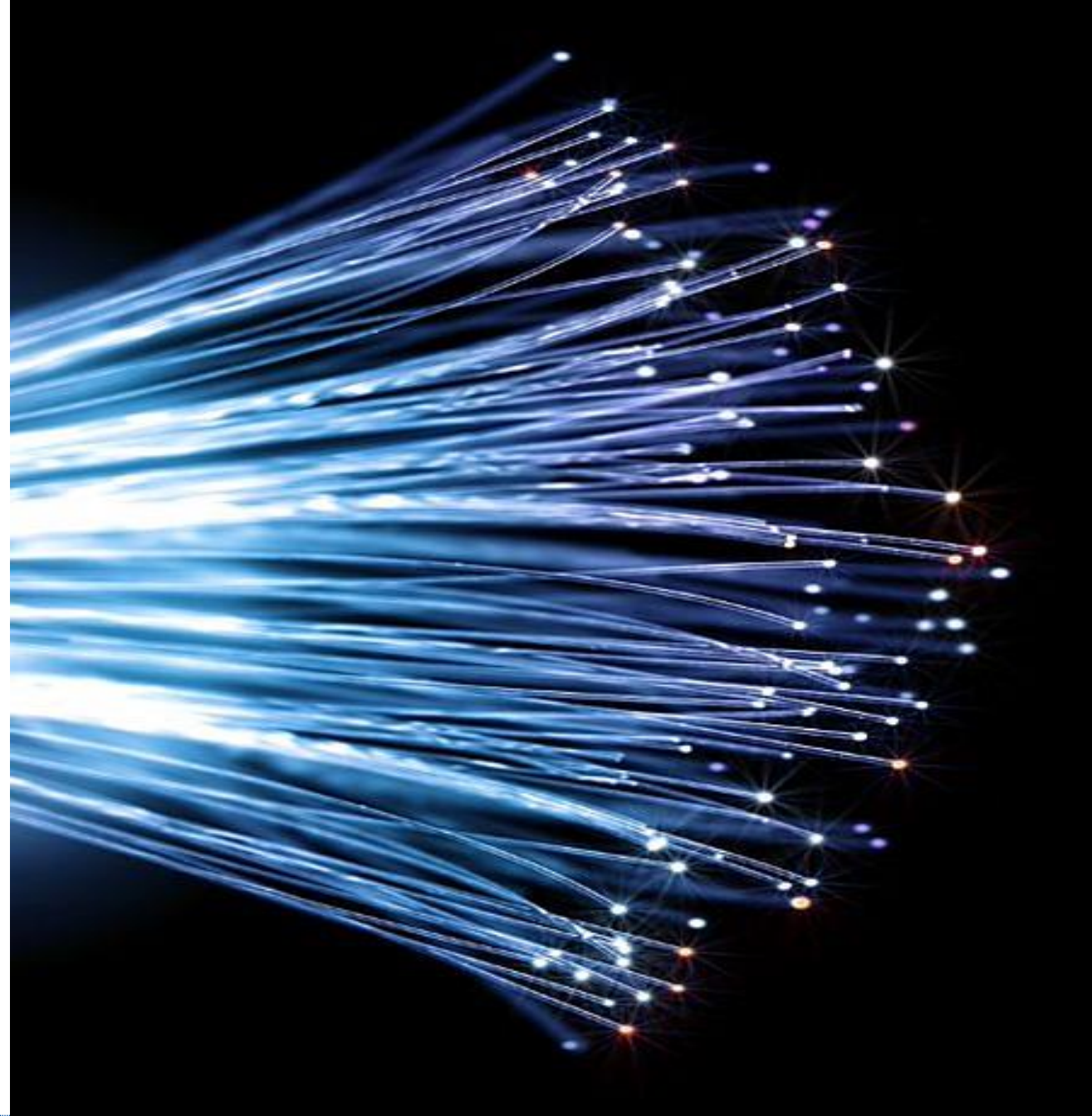


Source: IDATE for FTTH Council EUROPE

# 5

## FTTH/B Market Panorama

Key conclusions



# Variables affecting FTTH adoption

Both positive and negative criteria should be considered

## POSITIVE IMPACTS

1

Data demand and bandwidth **has intensified** (due to COVID19 and WFH situations), more operators focused on full-fibre networks to sustain ongoing traffic increase

2

**National authorities** are fully **involved in broadband acceleration via FTTH**, with new national programmes being defined to reach Digital Agenda goals for 2025/2030.

3

**Progress in micro-trenching and cable design** is less intrusive/disruptive in cities and neighborhoods while **new low profile cable designs offer better aesthetics** (indoors and outdoors)

4

Ongoing trend towards **mutualized networks and network sharing agreements** in Europe will accelerate FTTH deployments

5

Continued investment from private financing groups for new and existing network operators.

## NEGATIVE IMPACTS

1

**Gigabit Capable FWA (60Ghz) is becoming more common in isolated areas**, thus will delay FTTH deployments in some regions. **5G technology** used in high spectrum bands (26 GHz) can directly challenge FTTH in the fixed residential market

2

FTTH investments delayed in several areas due to **direct alternative technologies** such as Cable (Docsis 3.1/4.0) and G.Fast

3

Misleading fibre advertising is still impacting FTTH subscriber adoption. New demand for WFH applications in the home will help differentiate FTTH further from FTTC as 2021 progresses.

4

Fibre Rollout Plans being delayed across Europe – some by up to 2 years. Removal of red tape and better central coordination can tackle these delays.

5

Availability of skilled labor to build out new fibre networks is beginning to be felt in late 2020. The growth expected in 2021 and 2022 will make this more pronounced.

# Key conclusions

## Regional recap

### FTTH/B reaching a new level

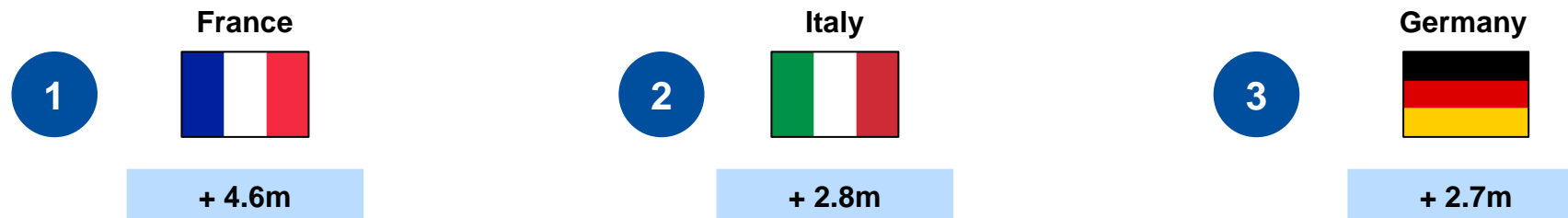
- FTTH/B networks are now **covering more than half of total households in the EU39 region (53%)**: a key milestone on the path towards full fibre connectivity across all of Europe.
- EU39 reaching **82 million FTTH subscriptions**, with **EU27+UK accounting for 56%**.
- **183 million homes passed** by full-fibre infrastructure in the total region, **98 million** in EU27+UK.

### Key lessons to be learned

- In many historical copper-based countries (UK, Germany, Italy), the **whole telecom ecosystem has intensified its efforts** towards full-fibre connectivity, and **the pandemic tends to accelerate** both deployments and adoption. There is still some distance to go with these 3 countries have ~60% of the remaining Homes to be passed in the EU27+UK!
- **National authorities** are even more involved in the digital transformation, in the wake of COVID-19 crisis, implying revised **national programmes**, subsidies and a relevant **policy framework** to promote **fibre expansion**
- **Underserved regions** are also affected by the COVID pandemic and **their need for reliable networks** is now a clear target for the ecosystem

### Top 3 - Main movers in terms of Homes Passed in absolute numbers

Data comparison between Sept. 2019 and Sept. 2020



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**Council  
Europe**

# Thank you for your Participation!

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