

Press release

## BROADBAND AND SUPERFAST BROADBAND MARKET

### Tremendous progression in FttH rollouts and take-up in Q1 2020

Paris, 4 June 2020

Today, Arcep is publishing its scoreboard for the fixed broadband and superfast broadband market (rollouts and subscriptions) in France as of the end of March 2020. This quarter confirms the record increase in fibre (FttH) subscription numbers and rollouts observed in 2019, and this despite the early effects that the public health crisis and resulting lockdown had on rollouts in the second half of March.

#### **SUBSCRIPTIONS: pace of the transition from broadband to superfast broadband access increasing every quarter**

- Over the course of Q1 2020, the number of superfast broadband subscriptions (maximum download speed equal to or faster than 30 Mbit/s) increased by 725,000 to reach 12 million. Superfast access, and especially FttH is replacing broadband access – whose subscription numbers decreased by 460,000 in Q1 2020 – at a steadily increase pace, from quarter to quarter. Forty percent of all subscribers in France now have a superfast access line, which is up six points YoY.
- Virtually all of this growth is due to an increase in the number of subscriptions to fibre to the home/building (FttH/B) plans, which rose by 605,000 in the first quarter of this year. As of 31 March 2020, the number of end-to-end fibre access lines totalled 7.7 million. This technology now represents 64% of all superfast access subscriptions in France.
- In total, 48% of all premises eligible to subscribe to a superfast access plan were subscribing to such a plan in Q1 2020, which marks a 2% increase YoY.
- The total number of broadband and superfast broadband subscriptions stood at 29.9 million at the end of Q1 2020, which is 145,000 more than in the previous quarter and of 640,000 more than the year before (+2.2% YoY). The Covid-19 crisis, whose effects on this quarter were felt in the last two weeks of March, does not appear to have a significant impact on broadband and superfast broadband subscription growth or on the pace of subscribers' transition to FttH plans.

#### **ROLLOUTS: ongoing steady pace, with market players mobilised in those parts of the country covered by private sector initiative and for public initiative network rollouts.**

Over the course of Q1 2020, around 1.2 million additional premises were passed for FttH – which translates into a roughly 27% increase year on year. The impact of the Covid-19 crisis was felt in the second half of March, with a rate of deployment that fell by more than half. However, it will only become possible to measure the full scale of this impact by adding in data from the second quarter of the year, with the release of the next scorecard.

- As of 31 March 2020, 19.6 million premises were eligible to subscribe to an FttH access service, or 35% more than one year earlier.
- The majority of the growth continues to be in those parts of the country where the Government has issued a call for investment letters of intent (called "zones AMII" in French): more than 700,000 additional premises were rendered eligible during this past quarter.
- The pace of FttH rollouts in areas covered by public-initiative rollouts also rose during the quarter, with around 360,000 additional premises passed in Q1 2020. The overall rate of line sharing continues to

climb, reaching two-thirds of deployed lines. It nevertheless remains far below the rate in areas covered by public-initiative rollouts where it stands at over 90%.

- In total, at the end of Q1 2020, 25.2 million households in France were able to subscribe to a superfast internet access service, all technologies combined, including 18.6 million households located outside of very high-density areas.
- FttH rollout data have been updated on the [cartefibre.arcep.fr](http://cartefibre.arcep.fr) website and in the [Open Data](#) made available by Arcep.

### Open data: updating the repository on the number of premises in each municipality requiring FttH coverage

On 10 April, Arcep published a first version of this repository which is based on operators' enhanced prior information ("IPE") files which are updated as rollouts progress, and which enable a more relevant and up to date estimate of the number of premises in need of coverage. Arcep is therefore updating this information in a new, open data version of the scorecard for broadband and superfast broadband rollouts in Q1 2020, to incorporate changes in IPE data over the course of this first quarter. It has also taken this opportunity to render the processing of these data more reliable.

This update has thus made it possible to calculate that there are close to 40 million residential and business premises in France in need of a network connection, of which around 7.2 in very high-density areas, around 16 million in lower density areas covered by private sector initiative, and around 16.8 million located in more sparsely populated areas covered by public sector initiatives.

Over time, the "Ma connexion internet" tool will provide a more accurate estimate of the number of premises requiring connection, using both these IPE data and specific data tied to land registries. This tool is still in beta, and its output is still being analysed and finely tuned. "Ma connexion internet" is due to be updated in the coming weeks with data from Q1 2020.

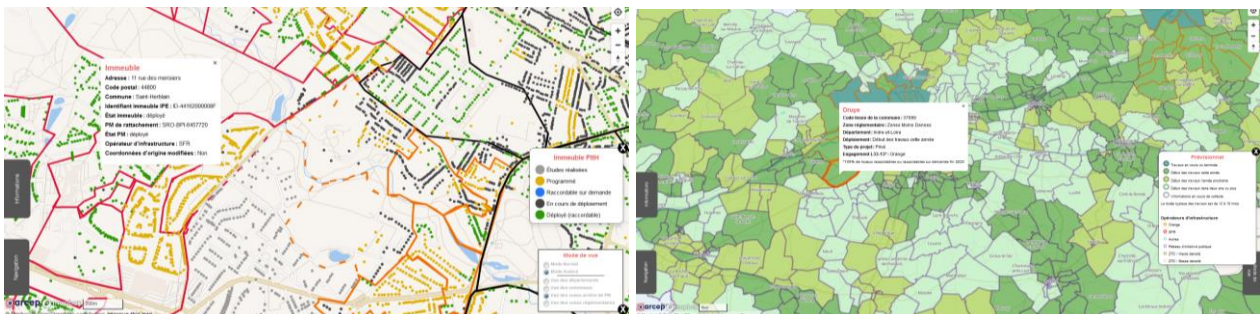
### Monitoring the legally binding FttH rollout commitments that operators have made in "zones AMII"

Arcep is responsible for monitoring operators Orange and SFR's compliance with the obligations they have made.

At the end of Q1 2020, based on the repository that was updated today, around 63% of the premises in the municipalities where Orange made rollout commitments, and 68% of those where SFR has made commitments have been passed for fibre. Increasing the pace of these rollouts will be a key challenge in the coming quarters, and Arcep will closely monitor operators' efforts to meet their targets on time.

### Tracking FttH rollouts

The [cartefibre.arcep.fr](http://cartefibre.arcep.fr) website allows users to obtain fibre coverage information on individual buildings, and so to track the progress of FttH rollouts in a very detailed fashion. The forecast view also provides them with information on the timeline for upcoming optical fibre rollouts in a given municipality.



The information associated with these rollout maps, both existing and forecast, are available as open data.

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## **Associated documents**

- > Fixed broadband and superfast broadband services scorecard [Figures for Q1 2020](#)
- > FttH rollout monitoring maps: <https://cartefibre.arcep.fr/>
- > Data available as [open data](#)

## **Arcep at a glance**






The Regulatory Authority for Electronic Communications, Postal Affairs and Print Media Distribution (Arcep), a neutral and expert arbitrator with the status of independent administrative authority (IAA), is the architect and guardian of internet, fixed and mobile telecoms and postal networks in France.

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