

Press release

FIXED BROADBAND AND SUPERFAST BROADBAND MARKET

Two thirds of all internet subscriptions are now FttH, but growth is shrinking, and the pace of rollouts slowed in 2023

Paris, 14 March 2024

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of December 2023. The slower pace of fibre to the home (FttH) deployment observed in the first half of 2023 continued into the second half of the year, particularly in the more densely populated parts of the country. The pace of new fibre plan subscriptions is slowing as well.

ROLLOUTS: Overall rate of FttH deployment decreased by more than 25% between 2022 and 2023.

- As of 31 December 2023, of the 44.1 million premises in Metropolitan France inventoried by operators, 38 million were passed for FttH, and more than 6 million still need to be covered. Optical fibre coverage increased by two points during the quarter, to 86%.
- Over the course of Q4 2023, one million additional premises were passed for FttH – or 25% fewer than in Q4 2022. Overall, the pace of FttH rollouts also decreased by 25% between 2022 and 2023.
- Over the course of 2023, 3.5 million additional premises were passed for FttH:
 - 2.4 million premises in lower density, public-initiative areas were rendered eligible for fibre access, which marks a 20% decrease YoY.
 - The decreased pace of deployment in lower density, public-initiative areas observed in 2022 continued on through 2023, with only 600,000 additional premises passed for FttH – marking a close to 40% drop YoY.
 - Close to 400,000 additional premises were passed in those areas covered by calls for expressions of local interest (called "zones AMEL" in French), a rate comparable to 2022.
 - Lastly, the rate of deployment in very high-density areas continued to slow over the course of the year, with fewer than 200,000 additional premises passed, or 40% fewer than in 2022.
- As of 31 December 2023, 39.8 million premises were covered by fixed superfast broadband services, which translates into a 90% rate of coverage.

Monitoring operators' compliance with their legally binding FttH rollout commitments

Arcep is responsible for monitoring operators' compliance with the commitments they have made, and publishes a quarterly progress report on the rollouts in question.

At the end of 2023, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"):

- around 90% of the premises for which Orange has made a commitment had been made eligible for fibre access;
- and around 96% of those in municipalities where SFR has made a commitment had been made eligible for fibre access.

Details regarding the progress of individual "AMEL" project commitments (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) can be found in pages 19 to 23 of the publication.

SUBSCRIPTIONS: At the end of 2023, 75% of all fixed internet subscriptions were superfast broadband plans

- The total number of superfast broadband subscriptions stood at 24.2 million as of 31 December 2023, or 75% of all broadband and superfast broadband subscriptions in Metropolitan France (+ 8 points YoY). Quarterly growth for superfast subscriptions (+ 645,000 in Q4 2023) is below the 835,000 increase of the previous year, which can be attributed chiefly to slower growth for fibre plan subscriptions.
- The pace of new subscriptions to fibre-to-the-home plans slowed but remained steady: +835,000 in Q4 2023 compared to 965,000 in Q4 2022. The number of FttH subscriptions stood at 21.4 million at the end of 2023, representing more than 66% of all broadband and superfast broadband internet subscriptions.
- The steady decrease in the number of “classic” broadband subscriptions continued on through the fourth quarter of 2023 (- 565,000 in Q4 2023 versus 770,000 in Q4 2022). Their numbers dropped to 8.1 million as of 31 December 2023.
- The total number of broadband and superfast broadband subscriptions stood at 32.3 million at the end of 2023. The pace of growth for these subscriptions increased slightly: + 80,000 subscriptions in Q4 2023 compared to + 65,000 in Q4 2022. Year-on-year growth stood at + 1.0% compared + 1.4% in 2022.

Tracking FttH rollouts with “Ma connexion internet”

The “*Déploiements fibre*” maps on the “[Ma connexion Internet](https://maconnexioninternet.arcep.fr)” website (formerly cartefibre.arcep.fr) allow users to track the progress of FttH rollouts in a very detailed fashion.



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

Associated documents

- > [Scorecard for fixed broadband and superfast broadband services – figures for Q4 2023](#)
- > [Maconnexioninternet.arcep.fr](https://maconnexioninternet.arcep.fr), to obtain detailed information on fixed internet access coverage, particularly thanks to FttH rollout maps (which are also still available at <https://cartefibre.arcep.fr/>)
- > Open data: [data on fibre](#) and [data on all access technologies](#)

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 communications and postal networks in France.