

Press release

FIXED BROADBAND AND SUPERFAST BROADBAND MARKET

The pace of progress in FttH deployment slowed in Q1 2023, while fibre subscription growth remained high

Paris, 8 June 2023

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of March 2023. The pace of fibre to the home (FttH) deployment slowed in Q1 2023, especially in the most densely populated parts of the country. Optical fibre plans, which have represented the majority of all broadband and superfast broadband subscriptions in Metropolitan France since mid-2022, continue to progress rapidly.

ROLLOUTS: Overall rate of deployment slowed in Q1 2023

- As of 31 March, 35.3 million premises across Metropolitan France were passed for FttH – which means that just over 80% of the 37.6 million premises in the country are able to subscribe to a superfast fixed broadband service – marking an increase of around 3.6 million YoY.
- Over the course of Q1 2023, 840,000 additional premises were passed for FttH – or around 20% fewer than in Q1 2022.
 - 610,000 premises in lower density, public-initiative areas were rendered eligible for fibre access, which marks a 10% decrease YoY.
 - Only 120,000 additional premises in less densely populated areas covered by private initiative were passed for FttH, a more than 50% drop compared to Q1 2022. Such a meagre quarterly increase has not been seen since 2014.
 - More than 60,000 additional premises were passed in those areas covered by calls for expressions of local interest (called "zones AMEL" in French) – similar to the growth rate in Q1 2022.
 - Lastly, carrying through on the very slow pace of the past several years, fewer than 50,000 additional premises were passed in very high-density areas in the first quarter of the year, or close to half as many as in Q1 2022.

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 progress report on the rollouts in question on a regular basis.

At the end of Q1 2023, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"):

- around 89% of the premises for which Orange has made a commitment had been made eligible for fibre access;
- and around 95% of those in municipalities where SFR has made a commitment had been made eligible for fibre access.

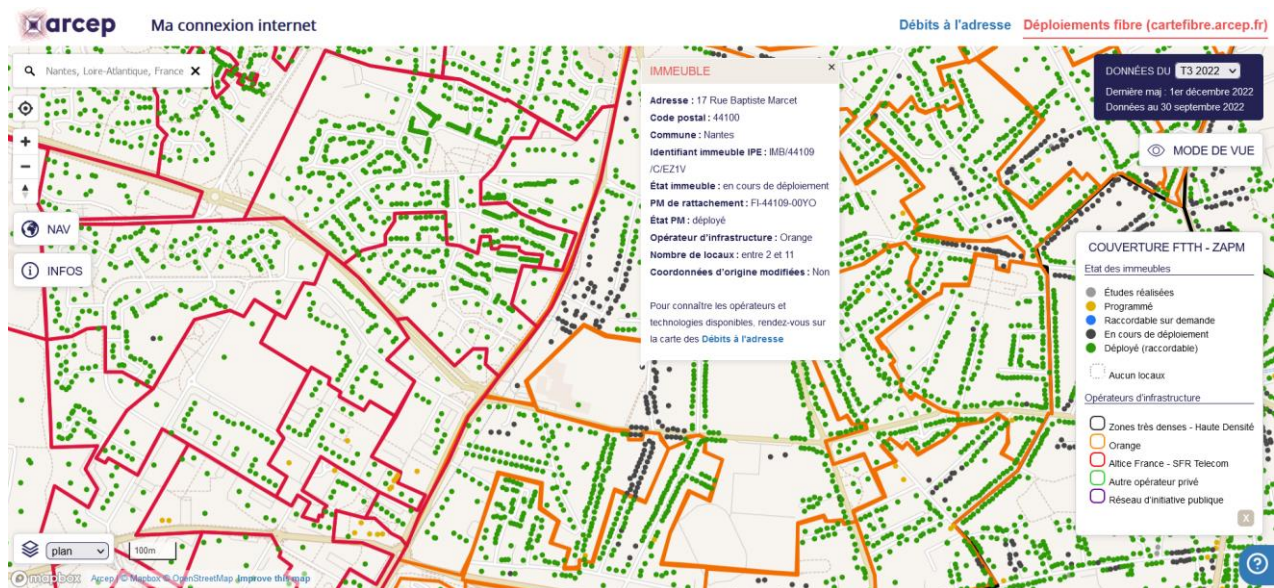
Details regarding the progress of individual "AMEL" project commitments (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) can be found in pages 19 to 23 of the publication.

SUBSCRIPTIONS: fibre plan customers now represent close to 60% of all internet subscriptions

- Superfast broadband subscription numbers grew by 765,000 in Q1 2023 to reach 22.3 million, in other words 70% of all internet subscriptions in Metropolitan France (+9 points YoY). This growth in superfast broadband subscribers is due entirely to the rise in fibre plan subscription numbers, coupled with the ongoing decline in subscriptions to plans using other superfast technologies.
- FttH subscription continues to enjoy a high rate of growth (+ 895,000 in Q1). Subscriptions to fibre-to-the-home plans reached 19 million at the end of Q1 2023, representing 59% of all broadband and superfast broadband subscriptions (+ 10 points YoY).
- The steady decline of “classic” broadband subscriptions continues at an accelerated pace (- 665,000 in Q1 2023). Their numbers dropped to 9.8 million as of 31 March 2023.
- The total number of broadband and superfast broadband subscriptions stood at 32 million as of 31 March 2023, which marks a smaller quarterly increase YoY: + 100,000 subscriptions in Q1 2023, compared to + 135,000 in Q1 2022. Year-on-year growth stood at + 1.3% in 2023 compared + 2.5% in 2022.

Tracking FttH rollouts with “Ma connexion internet”

The “*Déploiements fibre*” maps on the “[Ma connexion Internet](#)” 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 Q1 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.

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