

Press release

BROADBAND AND SUPERFAST BROADBAND MARKET

FttH deployment and adoption levelling off at a high rate

Paris, 9 December 2021

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of September 2021. Fibre to the home (FttH) deployment and adoption began levelling off at a high rate in Q3 2021

SUBSCRIPTIONS: fibre access subscription numbers increased by 4.1 million year-on-year (YoY), including an additional one million during the past quarter.

- Over the course of Q3 2021, the number of superfast broadband subscriptions (maximum download speed equal to or faster than 30 Mbit/s) increased by 870,000, to reach 17.5 million as of 30 September. This is a slightly lower increase than the previous year (+935,000) due to a decline in the number of non-fibre superfast subscriptions. In total, superfast broadband subscriptions accounted for 56% of all broadband and superfast broadband internet subscriptions in France (+11 points YoY), and 55% of all premises passed for superfast access, which marks a five-point increase over last year.
- Since the beginning of 2020, this growth has been entirely due to an increase in end-to-end fibre subscriptions, whose number increased by an additional 980,000 in Q3 2021, compared to + 945,000 one year earlier. As of 30 September 2021, the number of end-to-end fibre connections in France stood at 13.4 million, or an additional 4.1 million YoY, and represented 76% of all superfast access subscriptions in the country.
- The number of "classic" broadband subscriptions continues to shrink: decreasing by 3.0 million YoY, versus – 2.2 million last year. At the end of September, their number totalled 13.7 million.
- The total number of broadband and superfast broadband subscriptions stood at 31.3 million at the end of Q3 2021, increasing by 235,000 over the quarter, which is slightly less than in Q3 2020 (+ 225,000).

ROLLOUTS: The overall rate of deployment decreased but still remained high in Q3 2021, with around 1.3 million new FttH lines

- Over the course of Q3 2021, 1.3 million additional premises were passed for FttH – or around 13% fewer than in Q3 2020.
- As of 30 September 2021, 28.3 million premises were eligible to subscribe to an FttH access service, or 27% more than one year earlier.
- Over the course of this third quarter, 710,000 premises in public-initiative areas were rendered eligible, which marks a 61% increase YoY.
- The pace of FttH deployment in areas covered by private initiative continues to slow compared to the previous quarter. Around 390,000 additional premises were passed in Q3, compared to close to 470,000 in Q2.
- Rollouts in those areas covered by calls for expressions of local interest (called "zones AMEL" in French), reached 180,000 additional premises passed by the end of Q3 2021.
- The insufficient rate of progress of the past several quarters persists in very high-density areas.

In total, at the end of Q3 2021, 32.0 million households in France were able to subscribe to a superfast internet access service, all technologies combined, including 25.0 million households located outside of very high-density areas.

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.

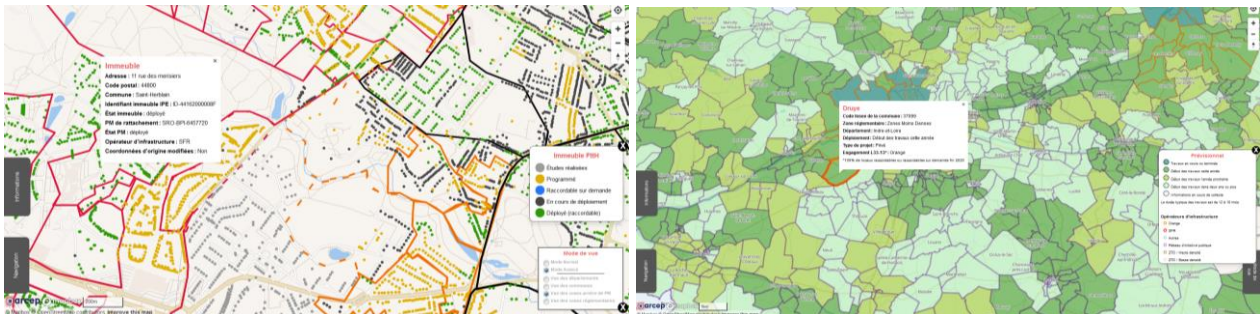
The Authority factored in the inventory that operators perform as their field studies progress, to update the assessment of the number of premises still needed to be passed in each municipality. At this stage, at the end of Q3 2021¹, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"):

- around 83% of the premises for which Orange has made a commitment had been made eligible for fibre access,
- and around 93% 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 the scorecard.

Tracking FttH rollouts

The "Déploiements fibre" maps on the "Ma connexion Internet" website (formerly cartefibre.arcep.fr) allows users to track the progress of FttH rollouts in a very detailed fashion. The forecast view, which was last updated on 15 November, also provides them with information on the timeline for upcoming optical fibre rollouts in a given municipality.

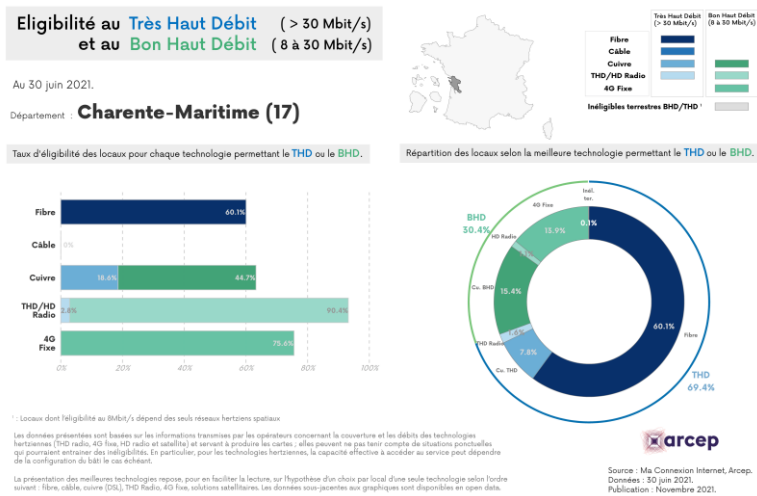


The information associated with these rollout maps, both existing and forecast, is available as open data.

Updates to "Ma connexion internet"

The "Ma connexion internet" website (maconnexioninternet.arcep.fr) was updated on 30 November with the addition of data as of 30 June 2021, along with [infographics for broadband and superfast broadband coverage in the different departments](#) based on that same data.

¹ The following rates of progress do not factor in certain instances of blocked rollouts, notably due to refusals from co-property owners or buildings under construction, which could result in some premises being considered outside of the scope of locales targeted for coverage.



“Fibre area” status awards

On 7 December 2021, Arcep granted the status of “Fibre area” (*zone fibrée* in French), in accordance with Article L. 33-11 of the French Postal and Electronic Communications code (CPE), to two requests filed by:

- The Union des Secteurs d’Energies (Energy sectors union) of the Aisne and the Aisne THD public initiative network, in 71 municipalities in this department.
- The Syndicat Intercommunal d’Energies (Intercommunal energy union) of the Loire and the THD42 Exploitation public initiative network, in 31 municipalities in this department.

The status of “Fibre area,” which is enshrined in law, serves to designate those territories with a fully deployed and operational superfast optical fibre network, and which have therefore fully laid the groundwork for the mass transition from copper to fibre. Areas that are granted this status are thus freed from previous obligations to install copper phone lines in Greenfield projects, whether individual homes, multi-unit dwellings or business premises.

Associated documents

- > [Scorecard for fixed broadband and superfast broadband services – figures for Q3 2021](#)
- > [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](#)
- > [Infographics on departmental broadband and superfast broadband coverage](#)
- > [Fibre area status tracking page](#)

Missing information that will be published in the coming weeks:

- > FttH network sharing figures

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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