

Press release

## FIXED BROADBAND AND SUPERFAST BROADBAND MARKET

### The pace of progress in FttH deployment holds steady in Q2 2023, while fibre subscription growth slows

Paris, 7 December 2023

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of September 2023. The slower pace of fibre to the home (FttH) deployment observed in the first half of 2023 continued into this quarter. The pace of new fibre plan subscriptions is slowing as well.

#### **ROLLOUTS: Overall rate of FttH deployment continued to slow in the third quarter of 2023**

- As of 30 September 2023, of the 43.9 million premises in Metropolitan France inventoried by operators, 37 million were passed for FttH, and close to 8 million still need to be covered. Optical fibre coverage increased by only one point during the quarter, to reach 84%.
- Over the course of Q3 2023, 825,000 additional premises were passed for FttH – or 25% fewer than in Q3 2022.
  - 565,000 premises in lower density, public-initiative areas were rendered eligible for fibre access.
  - More than 97,000 additional premises were passed in those areas covered by calls for expressions of local interest (called "zones AMEL" in French), making it the second strongest quarter for these areas.
  - The decreased pace of deployment in lower density, public-initiative areas observed during the previous quarters has continued, with only 139,000 additional premises passed for FttH – marking a close to 20% drop YoY.
  - Lastly, the rate of deployment in very high-density areas plummeted during the quarter, with fewer than 24,000 additional premises passed, or three times fewer than in Q3 2022.
- As of 30 September 2023, 38.9 million premises were covered by fixed superfast broadband services, or three million more than 12 months earlier.

#### **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 Q3 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 95% of those in municipalities where SFR has made a commitment had been made eligible for fibre access.

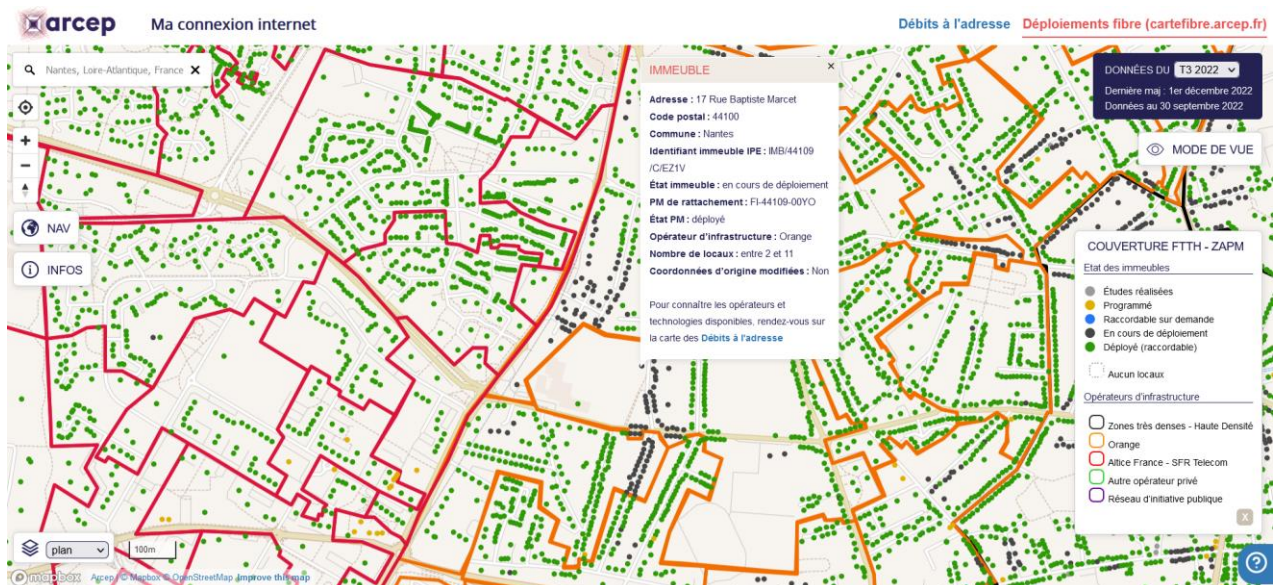
Details regarding the progress of individual "AMEL" project commitments (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) can be found in pages 19 to 23 of the publication.

## **SUBSCRIPTIONS: fibre plan customer numbers continue to increase steadily, albeit at a slower pace**

- The total number of superfast broadband subscriptions stood at 23.6 million as of 30 September 2023, or 73% of all broadband and superfast broadband subscriptions in Metropolitan France (+ 8 points YoY). Quarterly growth for superfast subscriptions (+ 625,000 in Q3 2023) is below the 700,000 increase of the previous year, which can be attributed chiefly to slower growth for fibre plan subscriptions.
- Subscriptions to fibre-to-the-home plans reached 20.6 million at the end of Q3 2023, representing more than 60% of all internet subscriptions (64%).
- The sharp decline of “classic” broadband subscriptions continues (- 545,000 in Q3 2023). Their numbers dropped to 8.6 million as of 30 September 2023.
- The total number of broadband and superfast broadband subscriptions stood at 32.2 million as of 30 September 2023. The pace of growth for these subscriptions has been slowing for close to two years: + 80,000 subscriptions in Q3 2023 compared to + 125,000 in Q3 2022. Year-on-year growth stood at + 1.0% compared + 2.0% in 2022.

### **Tracking FttH rollouts with “Ma connexion internet”**

The “*Déploiements fibre*” maps on the “[Ma connexion Internet](https://www.maconnexioninternet.fr)” website (formerly [cartefibre.arcep.fr](https://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.

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## Associated documents

- > [Scorecard for fixed broadband and superfast broadband services – figures for Q3 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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