

Press release

BROADBAND AND SUPERFAST BROADBAND MARKET

After a record year in 2020, the first quarter of 2021 marks a turning point: more than half of all internet access subscriptions are now to superfast services

Paris, 3 June 2021

Today, Arcep is publishing its scoreboard for the fixed broadband and superfast broadband market in France as of the end of March 2021. As of 31 March 2021, most internet subscriptions in France are to a superfast service, buoyed by the tremendous progress in fibre (FttH) deployment and adoption, following through on the record-breaking year that was 2020.

SUBSCRIPTIONS: superfast access subscriptions now the majority in France

- Over the course of Q1 2021, the number of superfast broadband subscriptions (maximum download speed equal to or faster than 30 Mbit/s) increased by 1.1 million – i.e. by 70% YoY – to reach 15.7 million. Which means they now represent the majority (51%) of all internet subscriptions in France (+9 points YoY), and 53% of all premises passed for superfast access, which marks a five-point increase over last year.
- For a year now, all of this growth has been due to an increase in end-to-end fibre subscriptions, whose number increased by 3.8 million YoY. Totalling 11.4 million, this technology represents close to three quarters (73%) of all superfast access subscriptions in France at the end of Q1 2021.
- This dynamic growth in superfast access adoption is going hand in hand with an increasingly sharp decline in the number of “classic” broadband subscriptions, which stood at 15.1 million on 31 March 2021, marking a decrease of -2.8 million YoY, compared to -1.8 million the previous year.
- The total number of broadband and superfast broadband subscriptions stood at 30.8 million at the end of Q1 2021, thanks to an increase for the second quarter in a row (+215,000 over Q4 2020 and +3.1% YoY).

ROLLOUTS: public-initiative networks log their best quarter ever, with deployments that outpaced private operators’ rollouts in “AMII” areas. The overall rate of deployment remained high in Q1 2021, with an additional 1.4 million FttH lines installed.

Over the course of Q1 2021, more than 1.4 million additional premises were passed for FttH – or around 19% more than in Q1 2020.

- As of 31 March 2021, 25.6 million premises were eligible to subscribe to an FttH access service, or 31% more than one year earlier. A quarter of them are located in high-density areas, half in those parts of the country where the Government has issued a call for investment letters of intent (called “zones AMII” in French), and the final quarter in areas served by public-initiative networks.
- The majority of the growth continues to be in those parts of the country served by public-initiative networks: during this record-breaking quarter, an additional 650,000 premises were rendered eligible in these areas that are benefitting from operators’ and local authorities’ drive.
- The pace of FttH deployment in areas covered by private initiative is flagging, however, compared to Q1 2020, with just over 600,000 additional premises passed.
- Rollouts also continue apace in those areas covered by calls for expressions of local interest (called “zones AMEL” in French), where there were close to 100,000 additional premises passed at the end of Q1 2021.

- The insufficient rate of progress of the past several quarters continues in very high-density areas.
- In total, at the end of Q1 2021, 30 million households in France were able to subscribe to a superfast internet access service, all technologies combined, including 23 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.

Over the course of Q1 2021, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"), Orange and SFR passed just over 400,000 and just under 100,000 additional premises, respectively, in those municipalities where they have made rollout commitments.

Operators' coverage levels in their respective service areas will be published in the coming weeks. They are currently being updated to factor in the additional premises to be passed, which operators do as their field studies progress.

At the same time, the first premises have been passed in virtually all of the "AMEL" projects (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) reaching a total of close to 100,000 premises passed. Details on the progress being made, commitment by commitment, are included in the scoreboard.

Tracking FttH rollouts

The cartefibre.arcep.fr website allows users 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.



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

Associated documents

> [Scoreboard for fixed broadband and superfast broadband services – figures for Q1 2021](#)

> FttH rollout monitoring maps: <https://cartefibre.arcep.fr/>

> Data available as [open data](#)

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 telecoms and postal networks in France.

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