

Press release

## FIXED BROADBAND AND SUPERFAST BROADBAND MARKET

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

Paris, 7 September 2023

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of June 2023. The slower pace of fibre to the home (FttH) deployment observed in Q1 2023 continued into this quarter, especially in the most densely populated parts of the country. Adoption of optical fibre plans, which have represented the majority of all broadband and superfast broadband subscriptions in Metropolitan France since mid-2022, continues to progress rapidly.

#### **ROLLOUTS: Overall rate of deployment slowed in the second quarter of 2023**

- As of 30 June of the 43.8 million premises in Metropolitan France inventoried by operators, 36.2 million were passed for FttH: optical fibre coverage rose by close to two points during the quarter, to reach 83%. 38.3 million premises in the country are able to subscribe to a superfast fixed broadband service – marking an increase of 3.2 million YoY.
- Over the course of Q2 2023, 870,000 additional premises were passed for FttH – or 20% fewer than in Q2 2022.
  - 600,000 premises in lower density, public-initiative areas were rendered eligible for fibre access.
  - The decreased pace of deployment in lower density, public-initiative areas observed during the previous quarters has continued, with only 130,000 additional premises passed for FttH: a close to 50% drop YoY. Such a low quarterly increase in these areas has not been seen since 2014.
  - More than 90,000 additional premises were passed in those areas covered by calls for expressions of local interest (called "zones AMEL" in French).
  - Lastly, the rate of deployment in very high-density areas continues to be vastly insufficient, with fewer than 50,000 additional premises passed in Q2 2022, or close to half as many as in Q2 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 Q2 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.

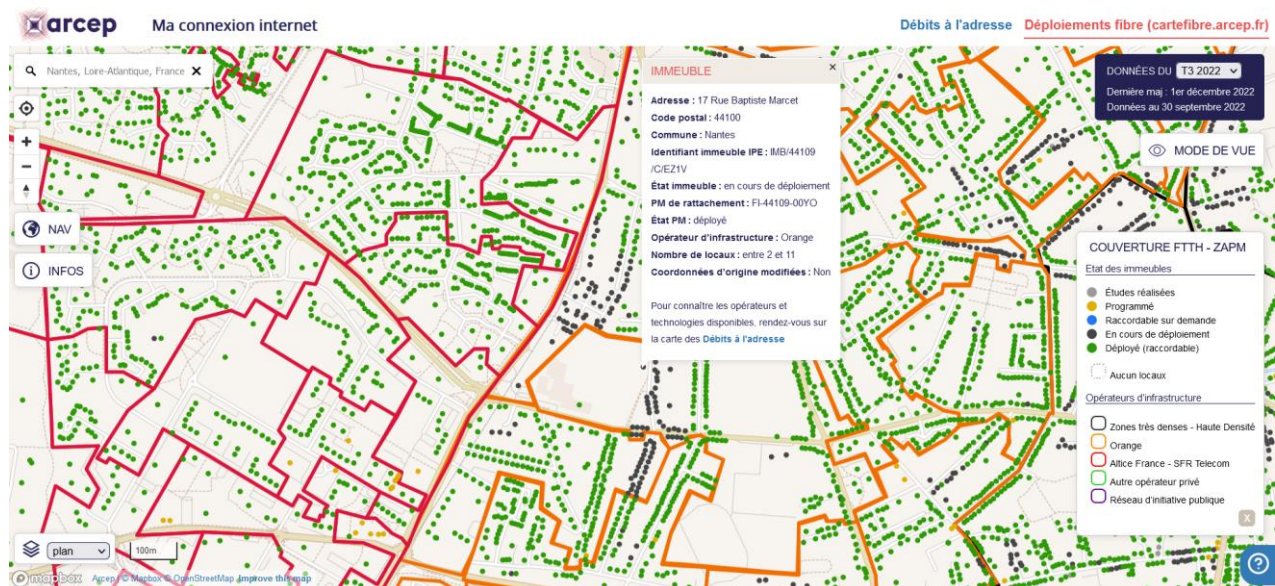
Details regarding the progress of individual "AMEL" project commitments (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) can be found in pages 19 to 23 of the publication.

## SUBSCRIPTIONS: fibre plan customers continue to increase sharply, totalling close to 20 million in Metropolitan France at the end of June 2023

- Superfast broadband subscription numbers grew by 655,000 in Q2 to reach 22.9 million as of 30 June 2023, or 71% of all internet subscriptions in Metropolitan France (+8 points YoY). This growth in superfast broadband subscribers is due in very large part to the rise in fibre plan subscription numbers.
- Subscriptions to fibre-to-the-home plans reached 19.8 million at the end of Q2 2023, representing 62% of all broadband and superfast broadband subscriptions (+ 11 points YoY). FttH subscription continues to enjoy a high rate of growth (+ 790,000 in Q2).
- The steady decline of “classic” broadband subscriptions continues at an accelerated pace (- 585,000 in Q2 2023). Their numbers dropped to 9.2 million as of 30 June 2023.
- The total number of broadband and superfast broadband subscriptions stood at 32.1 million as of 30 June 2023. The pace of growth for these subscriptions is slowing YoY: + 65,000 subscriptions in Q2 2023 compared to + 120,000 in Q2 2022. Year-on-year growth stood at + 1.1% in 2023 compared + 2.3% 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.

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## Associated documents

- > [Scorecard for fixed broadband and superfast broadband services – figures for Q2 2023](#)
- > [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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