

Press release

BROADBAND AND SUPERFAST BROADBAND MARKET

The pace of progress in fibre coverage and subscription numbers is levelling off

Paris, 1 December 2022

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of September 2022.

The pace of fibre to the home (FttH) deployment has stabilised, albeit with sizeable disparities. In very high-density areas and parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"), the pace has dropped by half, year on year.

Optical fibre plans, which have represented the majority of all broadband and superfast broadband subscriptions in Metropolitan France since last quarter, continue to progress at a steady pace.

ROLLOUTS: Overall rate of deployment remains high, with 1.1 million new FttH lines deployed over the course of Q3 2022

- Over the course of Q3 2022, 1.1 million additional premises were passed for FttH – or around 60,000 fewer than in Q3 2021.
- As of 30 September 2022, 33.1 million premises were eligible to subscribe to an FttH access service, or 17% more than one year earlier. More than three quarters of all premises in Metropolitan France are thus eligible for FttH.
 - Over the course of this third quarter, close to 770,000 premises in **lower density public-initiative areas** were rendered eligible for fibre access, which exceeds what was achieved in Q3 last year.
 - The pace of FttH deployment in **areas covered by private initiative** continues to slow compared to the previous quarter, with fewer than 180,000 additional premises passed in Q3 2022, which is the slowest progress seen since 2015.
 - Additional premises passed in those areas covered by calls for expressions of local interest (called "zones **AMEL**" in French) exceeded 500,000 at the end of Q3 2022.
 - Lastly, the insufficient rate of progress of the past several quarters persists in **very high-density areas**, and the production of new lines has even decreased by close to 50% YoY.
- In total, at the end of Q3 2022, 35.9 million households in France were able to subscribe to a superfast internet access service over a fixed network, or more than four in five premises.

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 Q3 2022, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"):

- around 87% 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.

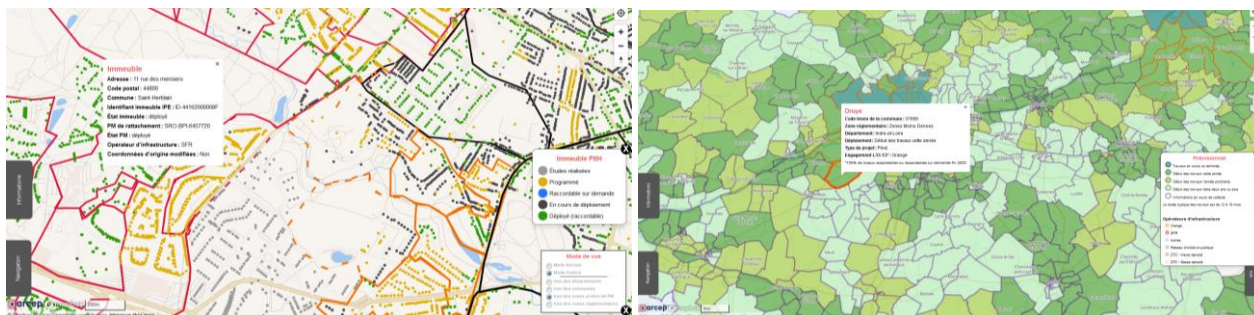
Details regarding the progress of individual “AMEL” project commitments (i.e. legally binding FttH rollout commitments that certain operators have made to local authorities, as part of calls for expressions of local interest) can be found in pages 19 to 23 of the publication.

SUBSCRIPTIONS: growth in fibre plan subscriptions remains high, despite a slight drop

- Superfast broadband subscription numbers grew by 725,000 in Q3 2022 to reach 20.7 million, in other words 65% of all broadband and superfast broadband subscriptions in Metropolitan France (+9 points YoY). This growth is due entirely to the surge in fibre subscriptions (+ 850,000), combined with the ongoing decline in subscriptions to copper-based superfast broadband (VDSL2) and cable plans.
- Superfast subscription growth continues to be due exclusively to the strong uptick in adoption FttH adoption rates. This ongoing strong rate of growth is nevertheless below what was observed last year (+ 975,000). Subscriptions to fibre-to-the-home plans reached 17.1 million at the end of Q3 2022, representing 83% of all superfast subscriptions and 54% of all broadband and superfast broadband subscriptions.
- The steady decline of “classic” broadband subscriptions continues, albeit at a more moderate pace than in 2021 (- 2.5 million compared to - 3.1 million one year earlier), with their number dropping to 11.2 million as of 30 September 2022.
- The total number of broadband and superfast broadband subscriptions stood at 31.9 million as of 30 September 2022 , increasing by 140,000 over the previous quarter (versus + 225,000 in Q3 2021) and by 625,000 YoY (+2.0%).

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 forecast view 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.

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Associated documents

> [Scorecard for fixed broadband and superfast broadband services – figures for Q3 2022](#)

> 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](#)

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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