

Press release

BROADBAND AND SUPERFAST BROADBAND MARKET

After a record year in 2020, FttH deployment and adoption continue to progress

Paris, 9 September 2021

Today, Arcep is publishing its scorecard for the fixed broadband and superfast broadband market in France as of the end of June 2021. Fibre to the home (FttH) deployment and adoption continued to advance in 1st semester 2021, following through on the record-breaking year that was 2020.

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 Q2 2021, the number of superfast broadband subscriptions (maximum download speed equal to or faster than 30 Mbit/s) increased by 905,000, which marks an even greater rate of increase than the previous year (+645,000). The number of superfast connections thus stood at 16.6 million as of 30 June, representing 54% of all broadband and superfast broadband internet subscriptions in France (+12 points YoY), as well as 54% of all premises passed for superfast access, which marks a six-point increase over last year.
- Since Q1 2020, this growth has been entirely due to an increase in end-to-end fibre subscriptions, whose number increased by an additional one million in Q2 2021, and by more than 4 million YoY. At the end of June 2021, these 12.4 million fibre connections represented 75% of all superfast access subscriptions in France.
- This dynamic rise in superfast access adoption is going hand in hand with an increasingly sharp decline in the number of "classic" broadband subscriptions, which stood at 14.4 million on 30 June 2021, marking a decrease of 3.1 million YoY, compared to -1.9 million in 2020.
- The total number of broadband and superfast broadband subscriptions stood at 31.0 million at the end of Q2 2021, thanks to an even stronger increase than in Q2 2020 (+170,000 versus +150,000 last year).

ROLLOUTS: The overall rate of deployment remained high in Q2 2021, with an additional 1.5 million FttH lines installed, and a tremendous surge in the pace of public initiative network deployments

Over the course of Q2 2021, 1.5 million additional premises were passed for FttH – or around 22% more than in Q2 2020.

- As of 30 June 2021, 27.0 million premises were eligible to subscribe to an FttH access service, or 30% 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.
- Over the course of this second quarter, 850,000 premises in public-initiative areas were rendered eligible, which marks a 95% increase YoY.
- The pace of FttH deployment in areas covered by private initiative continues to slow, compared to the previous quarter. Around 550,000 additional premises were passed in Q2, compared to close to 626,000 in Q1.
- Rollouts also continue apace in those areas covered by calls for expressions of local interest (called "zones AMEL" in French), where 150,000 additional premises passed by the end of Q2 2021.

- The insufficient rate of progress of the past several quarters continues in very high-density areas.
- In total, at the end of Q2 2021, 31.0 million households in France were able to subscribe to a superfast internet access service, all technologies combined, including 24.0 million households located outside of very high-density areas. As of the latest tally of superfast access, all technologies included (i.e. including wireless), established on 31 December 2020, 29.4 million premises in France were eligible for a superfast internet access service (of which 28.6 million were able to connect to a wireline network). A satellite superfast access solution became available in Metropolitan France in the first half of 2021.

Monitoring operators' compliance with their legally binding FttH rollout commitments

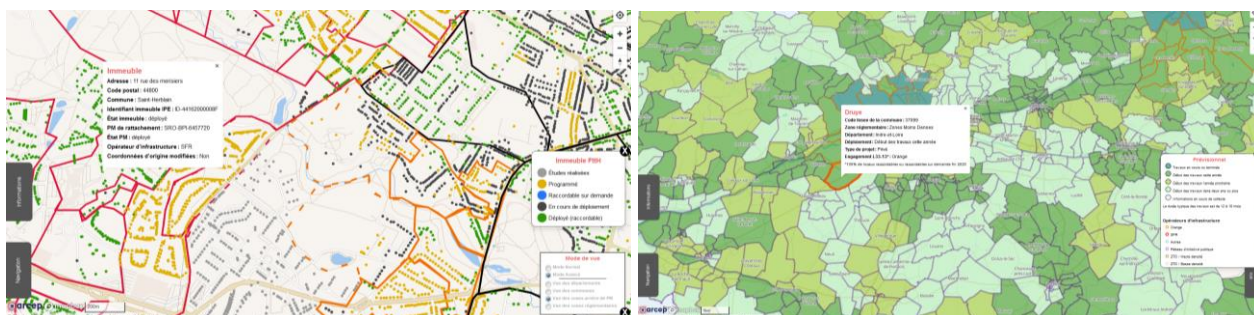
Arcep is responsible for monitoring operators' compliance with the commitments they have made, and publishes a progress report on the rollouts in question on a regular basis.

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 Q2 2021, in those parts of the country where the Government has issued a call for investment letters of intent ("zones AMII"), around 81% of the premises for which Orange has made a commitment, and 90% 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 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.

Updates to "Ma connexion internet"

The "Ma connexion internet" website (maconnexioninternet.arcep.fr) has been updated with the addition of data as of 31 December. Today, Arcep is publishing [infographics for broadband and superfast broadband coverage in the different departments](#) as of 31 December 2020, based on "Ma connexion internet" site data.

Press liaison

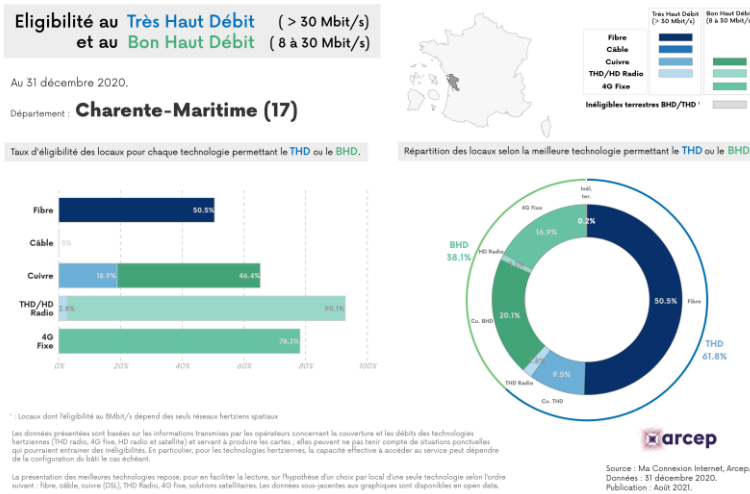
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“Fibre area” status awards

On 15 June 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 (CPCE), 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 182 municipalities in this department.
- The Syndicat Intercommunal d’Energies (Intercommunal energy union) of the Loire and the THD42 Exploitation public initiative network, in 34 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 Q2 2021](#)
- > FttH rollout monitoring maps: <https://cartefibre.arcep.fr/>
- > Data available as [open data](#)
- > [The infographics of the departmental coverage in very high speed and in good high speed](#)
- > [The page of follow-up of the fibered zones](#)

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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