



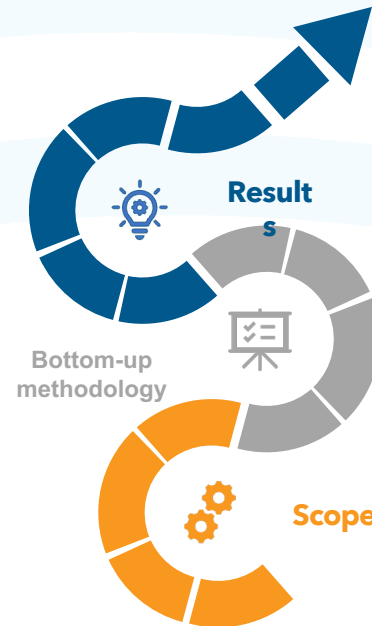
# FTTH/B Forecast for Europe 2023-2029

European Market View

FTTH Council Europe's Market Intelligence Committee

# Methodology

- Desk research
- Direct contacts with leading players and IDATE partners within countries
- Information exchange with FTTH Council Europe members
- Apply Forecast Model based on Supply/Demand Criteria.



- Both quantitative and qualitative data
- Adjusted Forecasts for years 2023 and 2029
- Results compared with local intelligence sources, including regulator and other recent publications where available and appropriate.
- Study of EU27+UK and EU39 countries
- Based on feedback from all main operators, service provider associations and regulatory contacts in each country

# Important definitions

**Premise:** A house or building, that could be connected by an FTTH/FTTB network

**Homes Passed:** The potential number of Premises which a Service Provider has capability to connect to an FTTH/FTTB network in a service area with minimal additional installation

**Sockets:** The In-Home connection point of a single fibre service provider inside a premises. It is possible to have multiple sockets if the location is serviced by multiple FTTH network operators

**Subscribers:** The number of Premises which are connected to a network and are already subscribers

**Coverage rate:** Homes passed – as a proportion of Total Households

**Take Up rate:** Subscribers – as a proportion of Homes Passed

**Penetration rate:** Subscribers – as a proportion of Total Households

# Forecast study – Factors considered



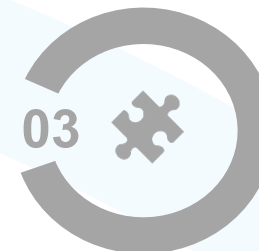
## Supply criteria

- **Strategic plans** from telecom players towards high-speed broadband deployments once COVID-19 impacted in the European region.
- **Public Funds** allocated from governments to deploy fibre networks.
- New Initiatives from **Municipality/utility players** to accelerate **fibre development in remote areas**, where private operators don't have any incentives to deploy.
- **Copper switch off** initiatives delimited by many players.
- **Cable operators migrations to FTTH/B**
- **Green-field housing** and systematic deployment of FTTH in any new build housing



## Demand criteria

- **Broadband services take-up.** Average speeds continue to rise for households and new dynamics are emerging as changes in work and lifestyle have influenced internet usage patterns.
- **Data consumption keeps growing** due to new confinement dynamics (teleworking and remote studying) that force the intensive use of **video content, high-definition streaming** which demand **high bandwidth capacity**.
- Demands to accomplish **EC Digital Agenda goals** by 2025 and 2030
- People in **rural areas** still not covered by high-speed connections demanding access **to NGNs. People moved to rural areas as a way to reduce virus exposure.**
- **National and Digital Agendas** pushing to accelerate fibre deployments



## Others

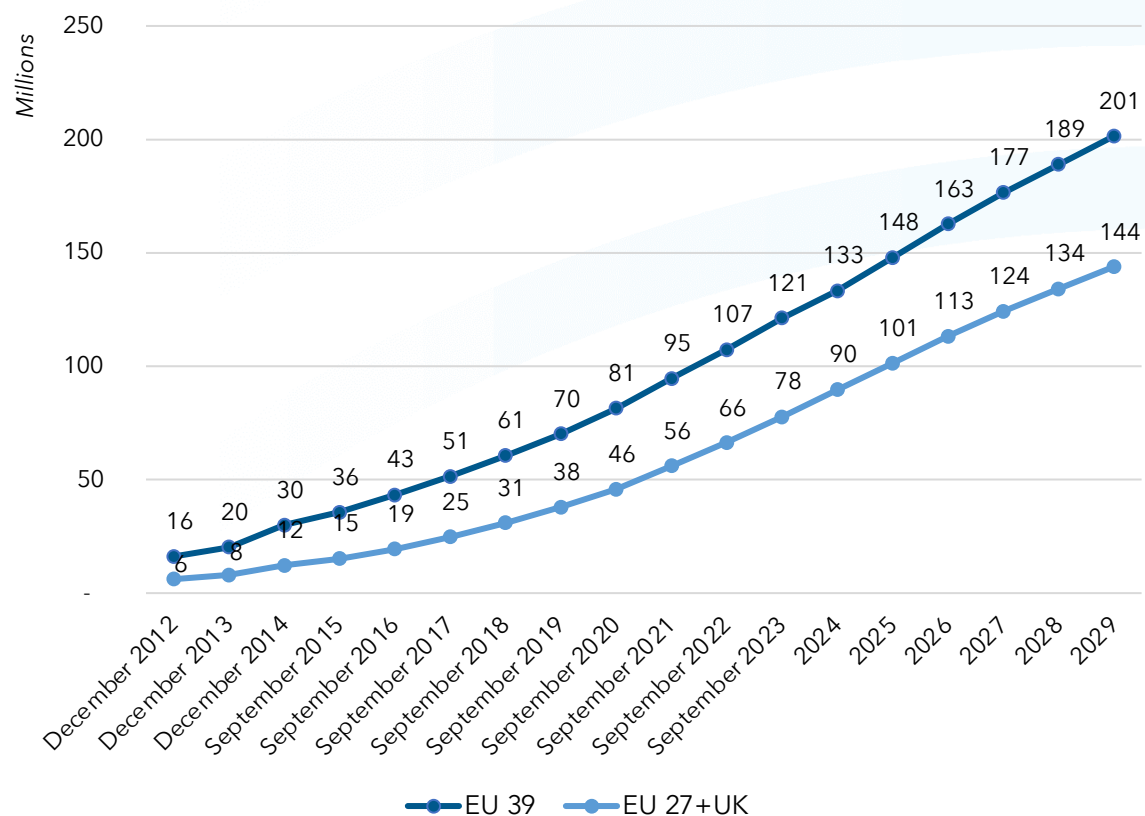
- Impact of **infrastructure costs**
- Impact of **copper-based DSL improvements** with new emerging variants, such as G.Fast.
- Impact of cable-based networks with DOCSIS 3.1/DOCSIS 4.0
- Impact of **networks sharing** agreements and new deployments based on **co-investment** among players.
- **Regulatory changes at European and national level** to create a common commitment to deploy FTTH networks.
- Impact of **macroeconomic environment and economical trends:** teleworking as a new dynamic and the creation of new business models
- FTTH rollout planning may be impacted by **buildout resource availability**

# European FTTH/B Historical and Forecasts (2012-2029)

## EU27+UK vs EU39

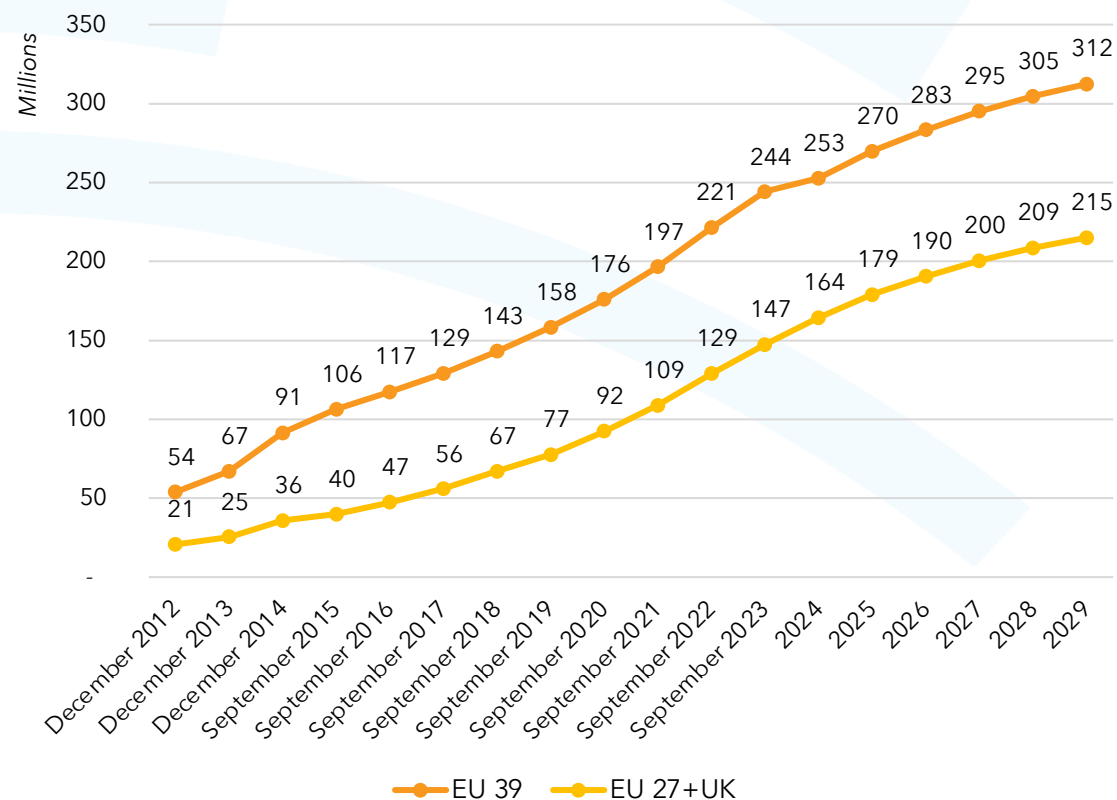
**Evolution of FTTH/B Subscribers Forecasts (million)**

Comparison EU27+UK / EU39



**Evolution of FTTH/B Homes Passed Forecasts (million)**

Comparison EU27+UK / EU39

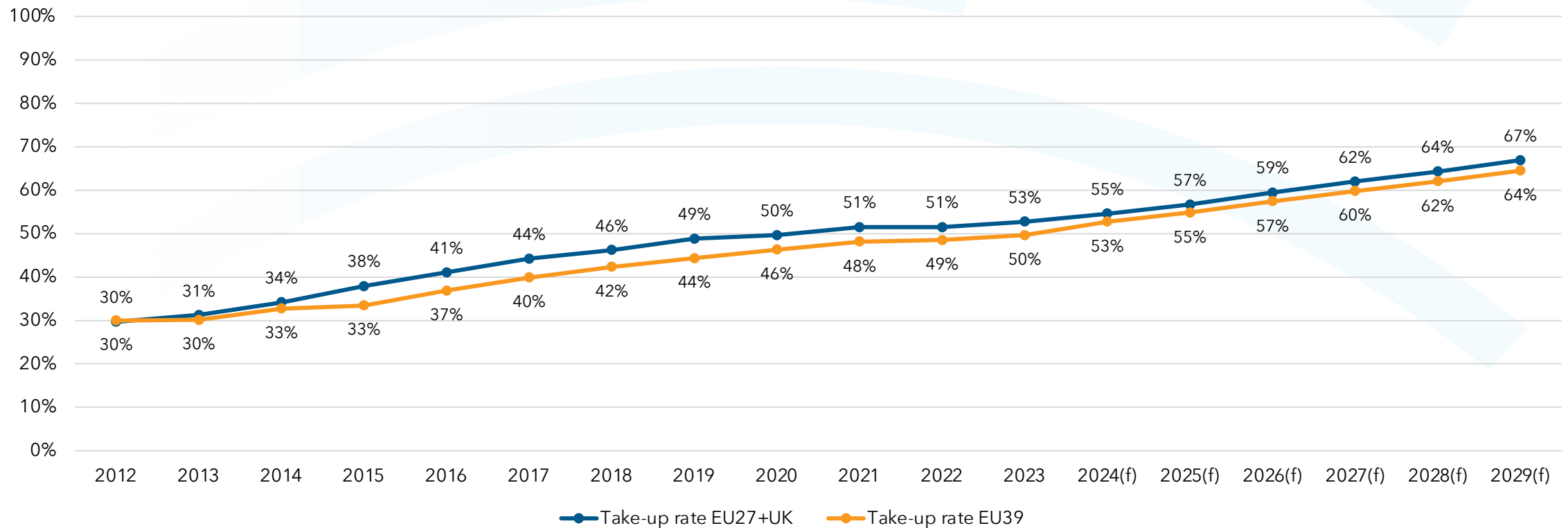


# European FTTH/B Historical Forecasts

## EU27+UK vs EU39

### FTTH/B Take-up Rates Forecasts (Subs over Homes Passed, in %)

Comparison EU27+UK / EU39



# Forecast exercise (2023-2029)

European ranking in terms of FTTH/B Subscriptions (in million)

2029 Forecasts

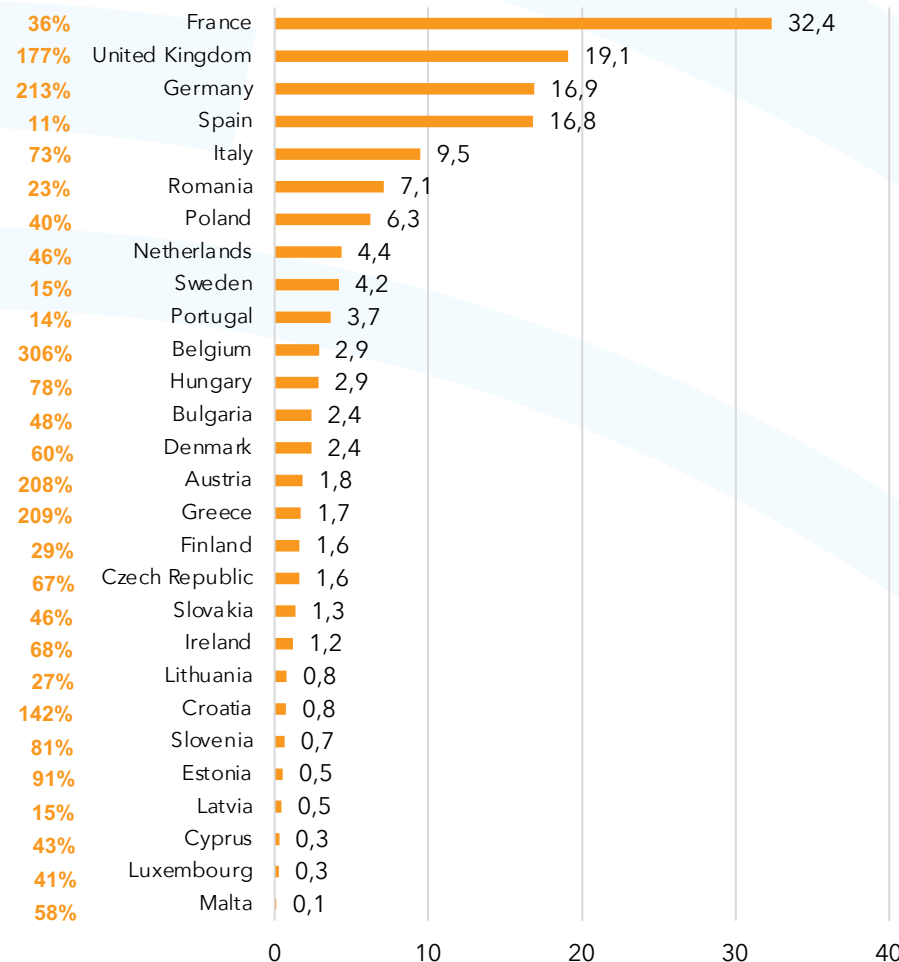
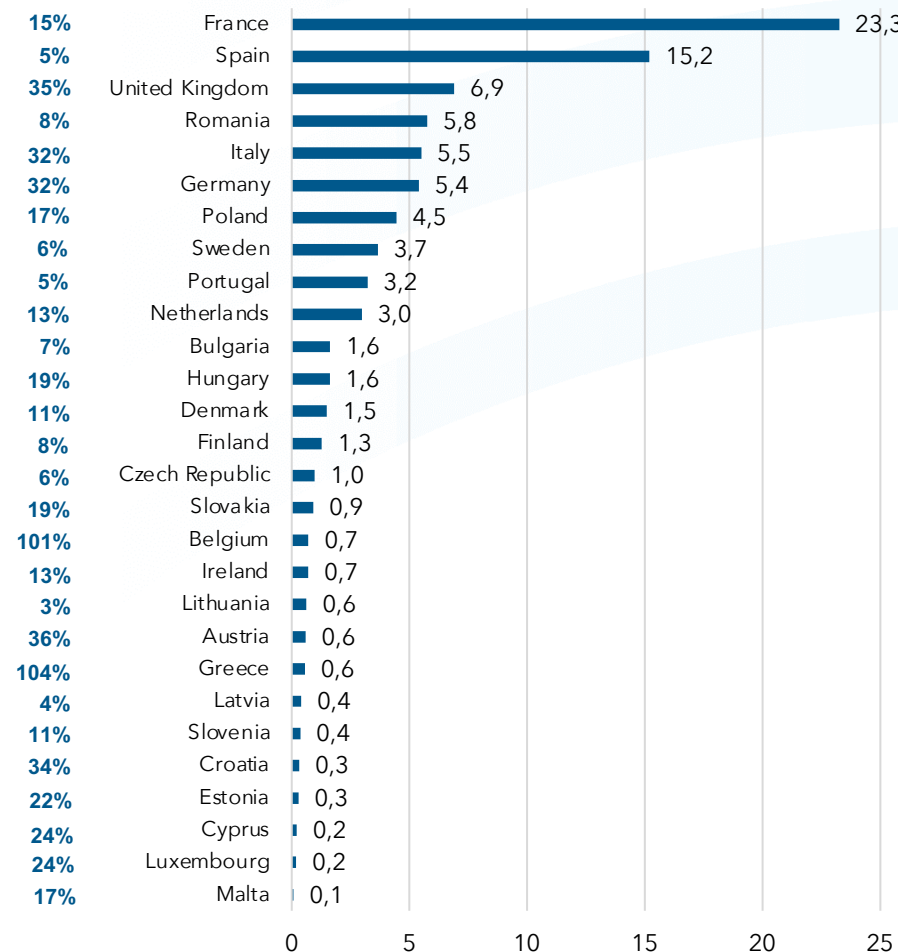
EU27+UK: ~144m FTTH Subs.  
EUR39: ~201m FTTH Subs.

% Evolution  
2023 / 2024

2024 Forecasts

% Evolution  
2024 / 2029

2029 Forecasts

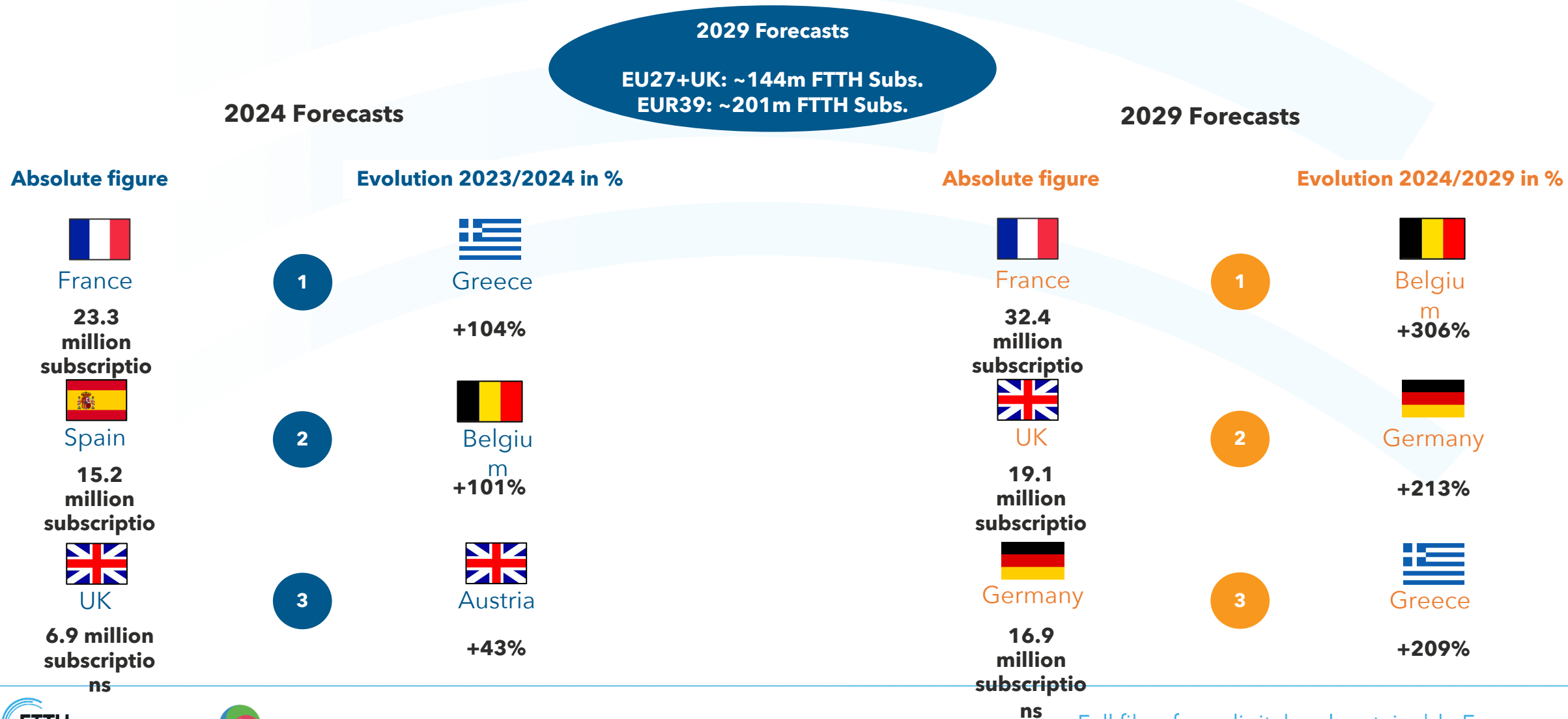


Source: IDATE for FTTH Council EUROPE



# Forecast exercise (2023-2029)

European ranking in terms of FTTH/B Subscriptions, Top 3 countries





# Forecast exercise (2023-2029)

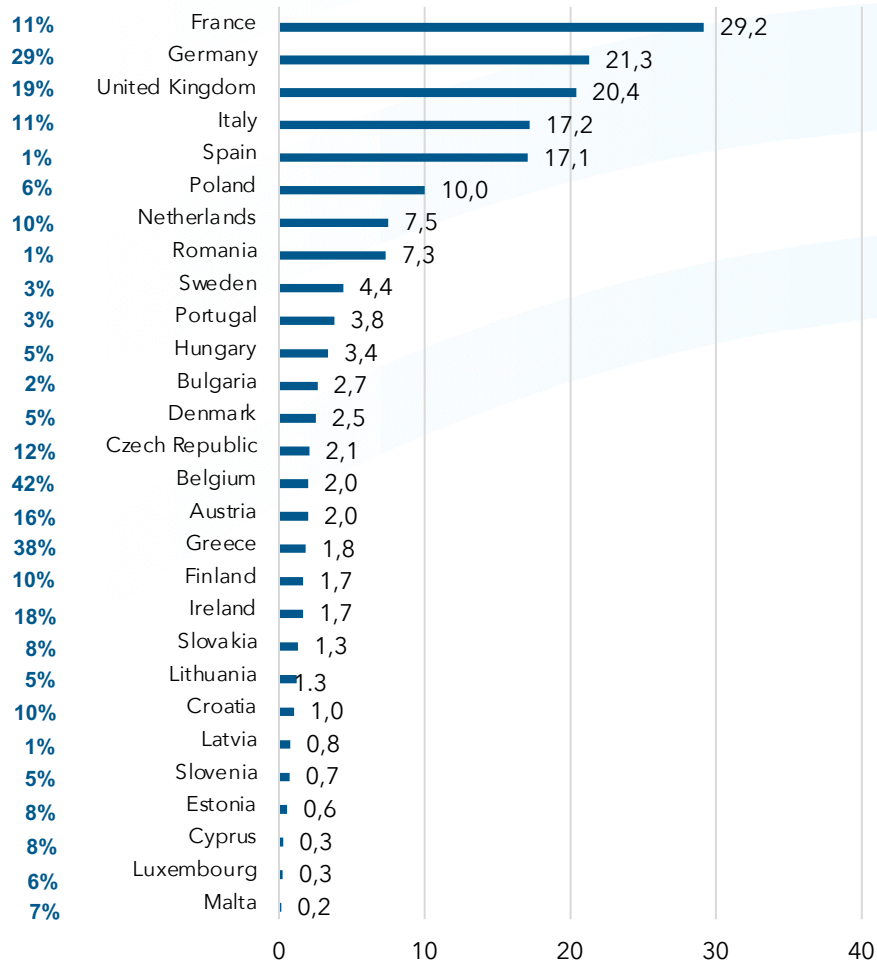
European ranking in terms of FTTH/B Homes Passed (in million)

2029 Forecasts

EU27+UK : ~215m FTTH H.P.  
EUR39 : ~312m FTTH H.P.

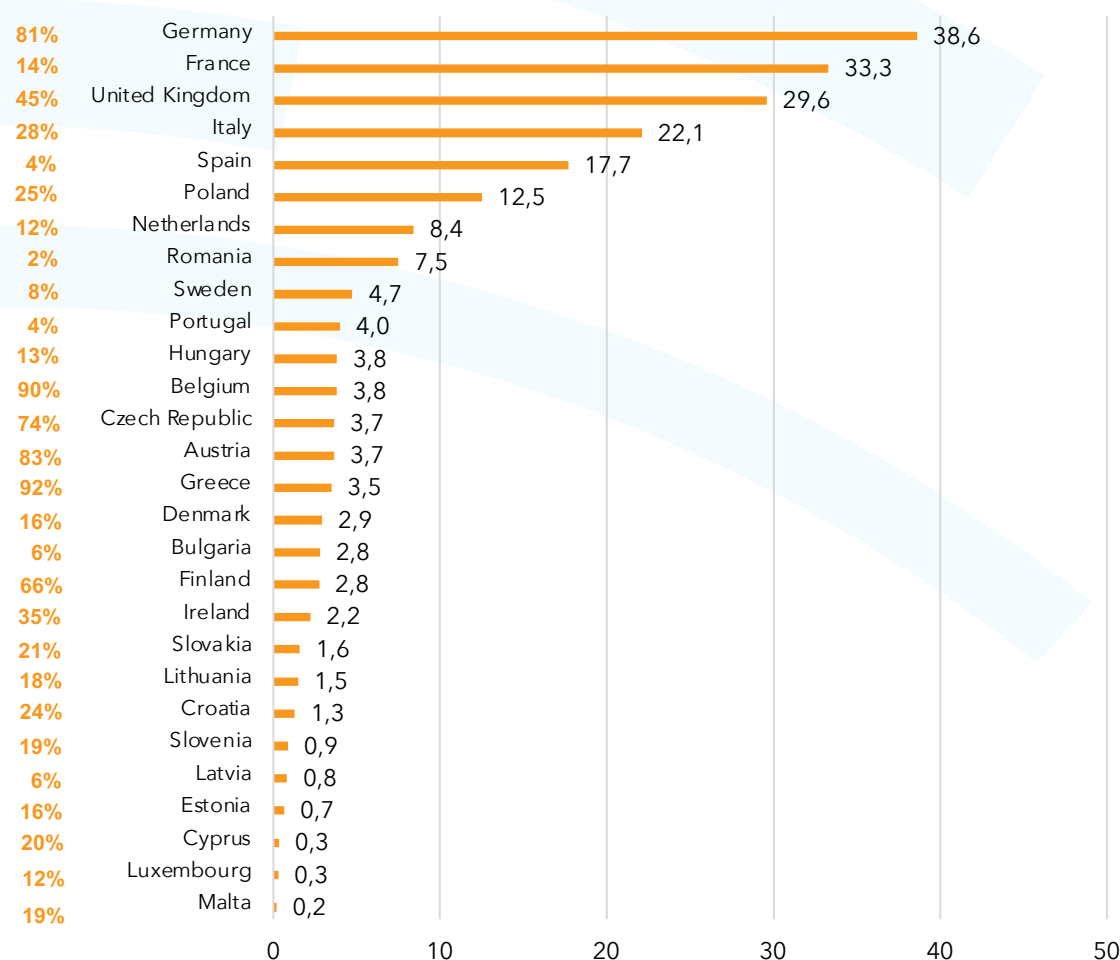
% Evolution  
2023 / 2024

2024 Forecasts



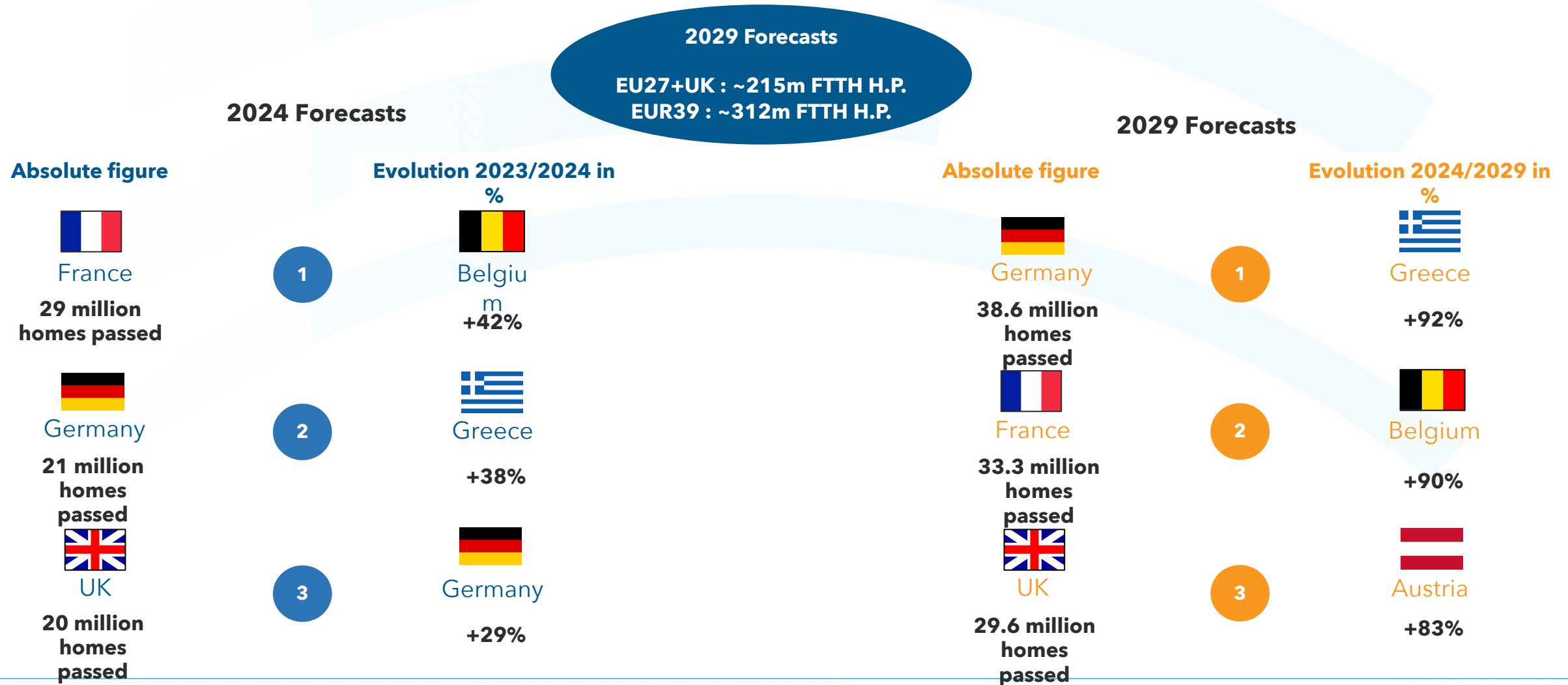
% Evolution  
2024 / 2029

2029 Forecasts



# FTTH/B Market Panorama

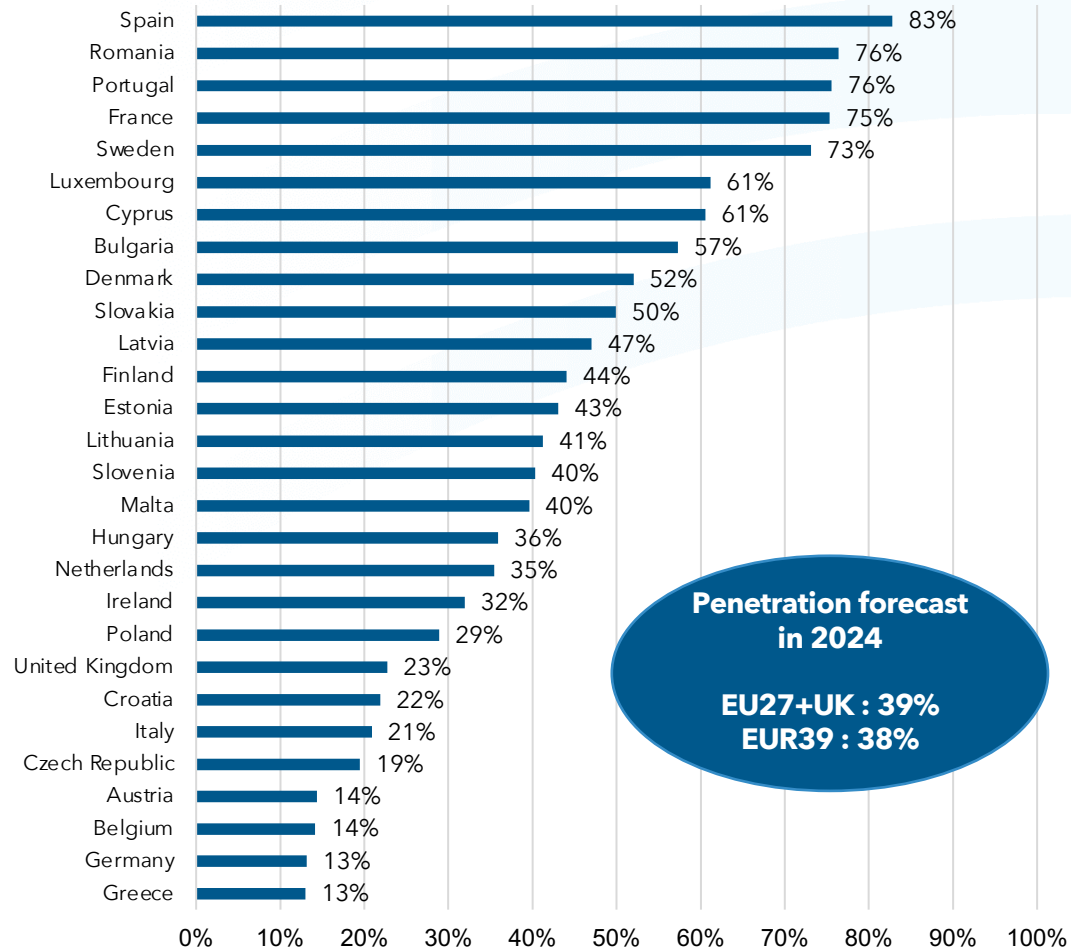
European ranking in terms of FTTH/B Homes Passed, Top 3 countries



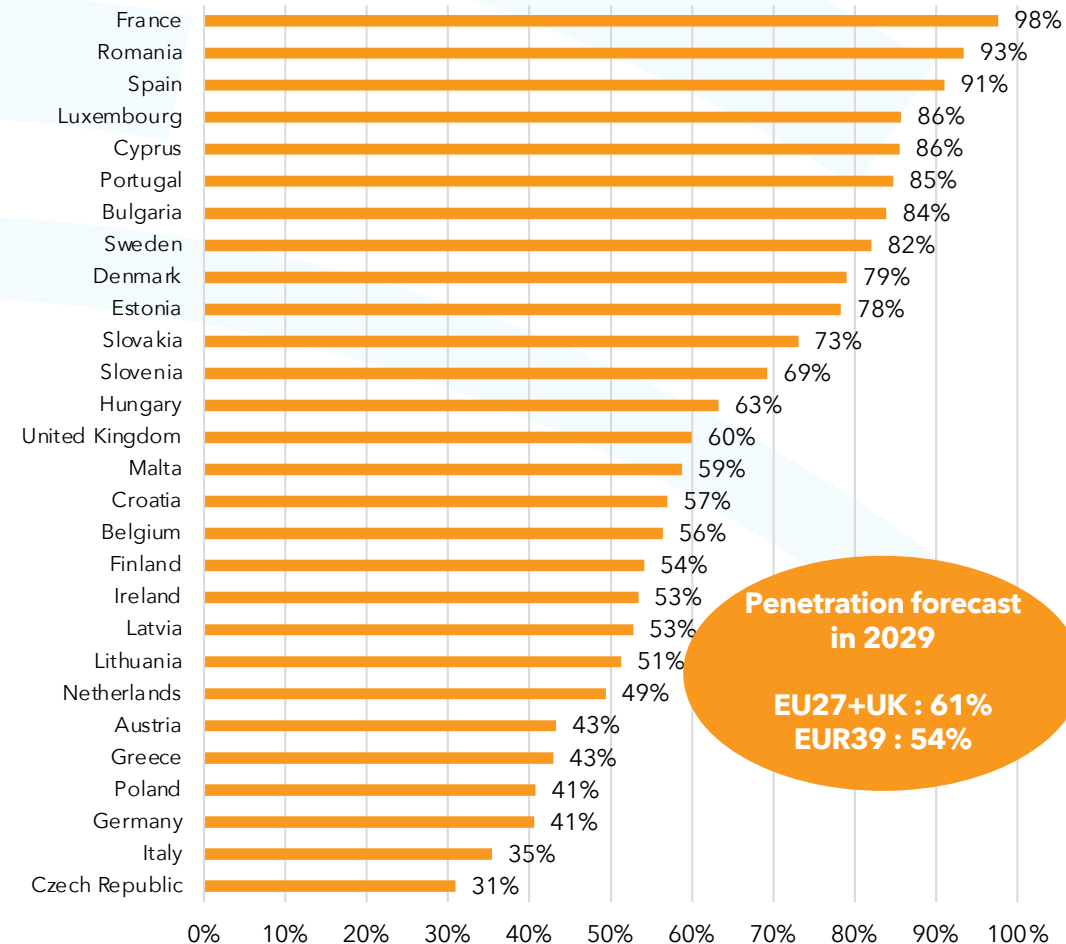
# Forecast exercise (2023-2029)

European ranking in terms of FTTH/B Penetration rate (%)

2024 Forecasts

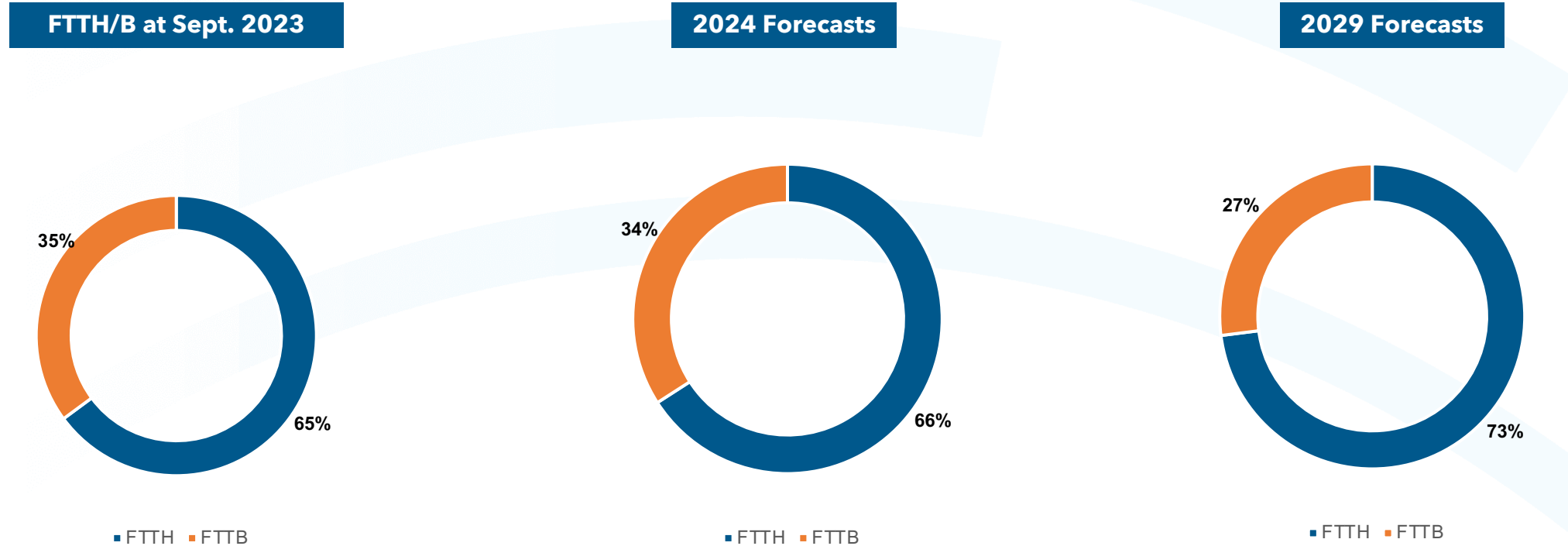


2029 Forecasts



# FTTH/B Architecture Evolution

Fibre in the process of being installed closer to end-users



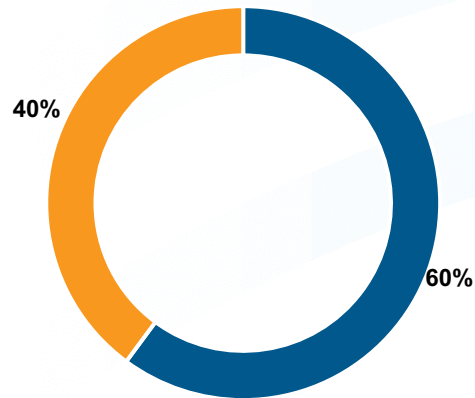
Source: IDATE for FTTH Council EUROPE

- Looking ahead, it is expected that by 2029, FTTB deployment will account for approximately 27% of fibre deployment, while FTTH will make up the remaining 73%.
- This shift towards FTTH architecture is indicative of the growing need for faster, more reliable internet connections that can keep up with the increasing demands of modern-day consumers.

# PON vs. P2P Fibre Ethernet Evolution

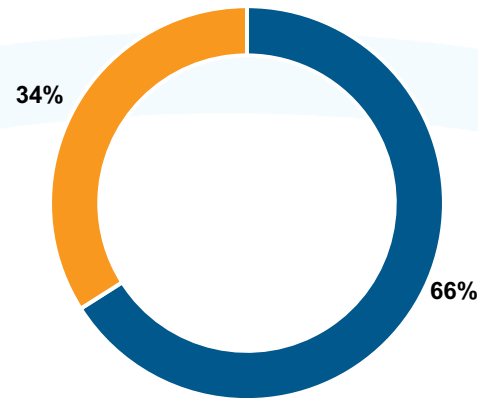
PON should become mainstream especially thanks to its energy efficiency

FTTH/B at Sept. 2023



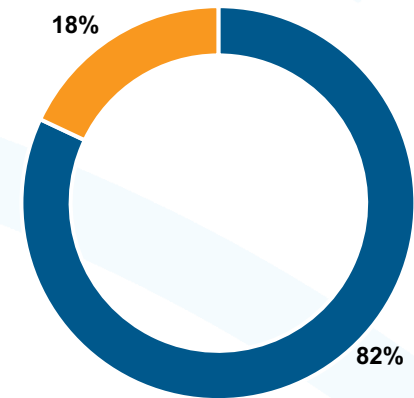
■ PON ■ P2P Fibre Ethernet

2024 Forecasts



■ PON ■ P2P Fibre Ethernet

2029 Forecasts



■ PON ■ P2P Fibre Ethernet

Source: IDATE for FTTH Council EUROPE

# Key conclusions

## FTTH/B Forecast for Europe

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This forecast exercise underscores the ongoing transformation of European countries toward a 'Digital Society' as outlined by European authorities, with FTTH/B playing a significant role in digital inclusion. Closing the digital gap between rural and urban regions will remain a key focus in the upcoming periods.

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The bandwidth limitations of current cable and copper networks are driving telecom players to deploy full-fiber solutions. Additionally, growing traffic demands are prompting operators to upgrade to full fiber to accommodate new peaks. Thanks to recently initiated national programs and Digital Agenda for Europe (DAE) targets for 2025 & 2030, full-fiber connectivity in European countries will reach new heights.

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In historically copper- and cable-based countries, the fixed broadband market is undergoing significant evolution. Alternative ISPs are actively engaging in FTTH deployments in regions not served by major national players. Recent efforts by incumbents to transition their core architecture to FTTH indicate forthcoming full-fiber rollouts. Notable examples include the UK, Germany, and Italy.

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- By the end of 2024, EU39 is projected to surpass 132 million FTTH subscriptions, with EU27+UK comprising 67% of the total. By 2029, Europe39 is expected to have approximately 201 million FTTH subscriptions, with EU27+UK accounting for over 143 million.
- In 2024, full-fibre infrastructure is estimated to pass 252 million homes in the region, including 164 million in EU27+UK. By 2029, FTTH/B is forecasted to cover 312 million homes across the entire region, with EU27+UK accounting for 215 million of them.

# Thank you for your attention!

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