

FTTH/B Market Panorama in Europe

September 2025

FTTH Council Europe's Market Intelligence Committee



AGENDA

1. Important definitions	3
2. General overview and main trends	7
3. FTTH/B Homes passed, Coverage rate and Sockets deployed	14
4. FTTH/B Subscribers and Take-up rate	25
5. FTTH/B Penetration rate	32
6. Who's leading the road to full fibre?	34
7. Key conclusions	42

1. Important definitions



Methodology



Mission on behalf of the FTTH Council Europe



Provide a complete summary of **the status of FTTH/B in Europe measured** during September 2025

This study follows a bottom-up approach, relying on data collected directly from major operators, as well as information from local regulatory authorities in each country (when available). It also incorporates data gathered by the European Commission through DESI studies.*



Scope

- Desk research
- Data per player for FTTH/B and other fibre-based architectures
- Key parameters study: technical, financial, business model, figures



Bottom-up methodology

- Direct contact, interviews and questionnaires with leading industry players and IDATE partners, used to verify data already gathered.
- Information exchange with FTTH Council Europe members



Results

- Both quantitative and qualitative data
- Market status in the country
- Strategic approach of involved players

Note: *Some operators do not disclose service penetration figures for individual network technologies (e.g. Swisscom)

Geographical scope

The study is focused on EU27+UK, EU39 and Balkans countries

▪ EUR 27 + UK detailed composition:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

▪ EU 39 detailed composition:

EU27 + UK

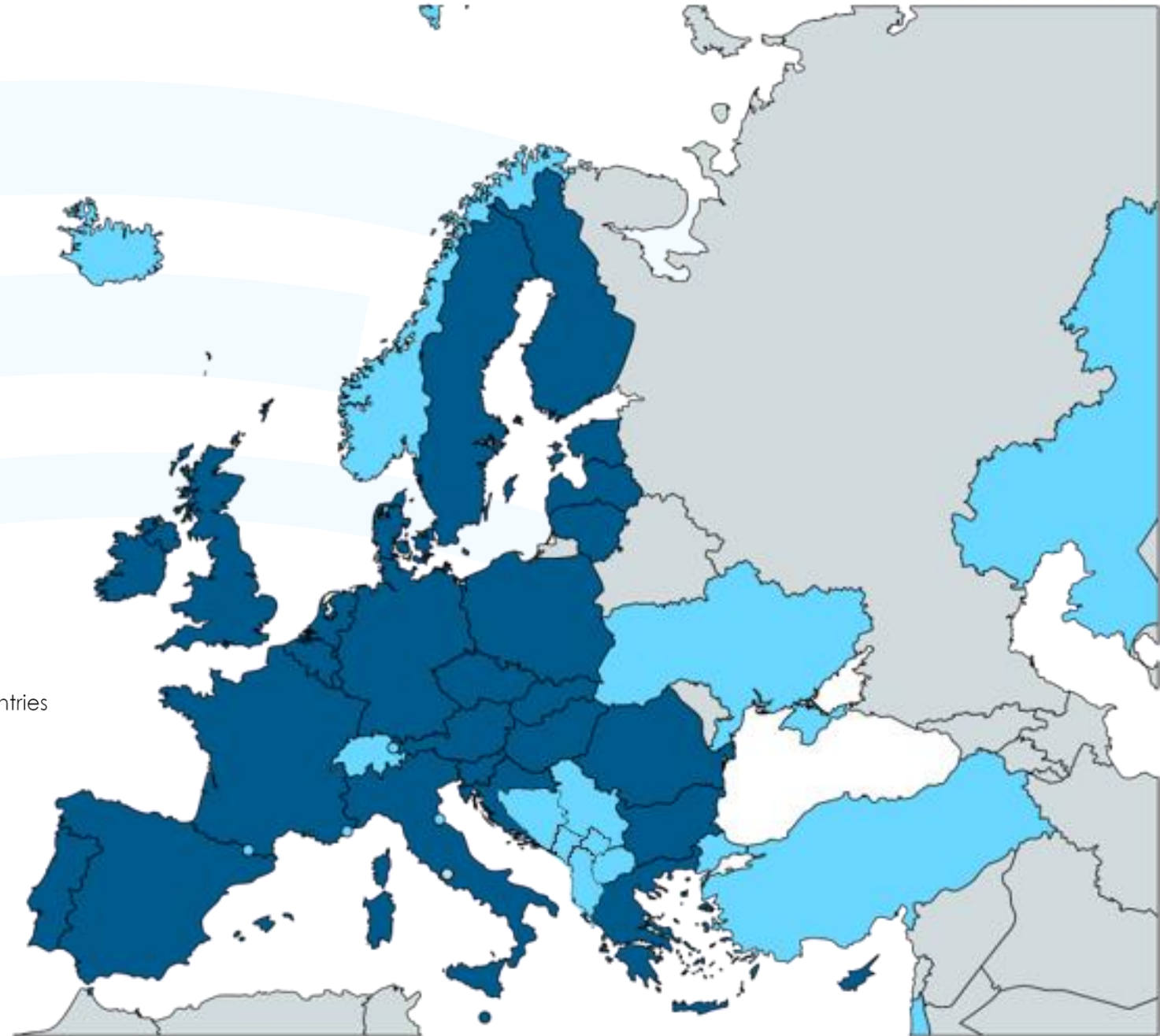
CIS countries: Kazakhstan, Ukraine*, +2

Iceland, Israel, North Macedonia, Norway, Serbia, Switzerland, Turkey

- EU 27+ UK
- Other European countries under study

▪ 4 news countries analyzed :

Albania, Bosnia-Herzegovina, Kosovo, Montenegro



Important definitions

HOUSEHOLDS

This includes all residential households, regardless of occupancy status. It therefore covers primary residences, secondary residences, and vacant homes.

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



2. General Overview & Main trends



FTTH/B Market Panorama

Key Figures as of September 2025 in EU39⁽¹⁾



- 1. The FTTH/B rollout is reaching maturity in Europe**
 With **79.3% of Homes covered** in EU39 (295 million homes passed), the market is progressively shifting from large-scale deployment to a post-rollout phase.
- 2. A structural gap remains between coverage and adoption**
 Despite this high level of coverage, only 160 million households subscribe to FTTH/B, representing a **43.1% penetration rate**. This highlights a persistent gap between network availability and actual subscribers' adoption.
- 3. Network monetization is now the main challenge**
 A **54% take-up rate** confirms that the priority is no longer network expansion, but **migration** from copper and cable toward Fibre.

SEPTEMBER 2025	EU 39	EU 27 + UK
Premises (Millions)	372	248
Homes passed (Millions)	295	191
Subscribers (Millions)	160	105
Coverage rate	79.3%	76.8%
Take-up rate	54.4%	54.9%
Penetration rate	43.1%	42.1%

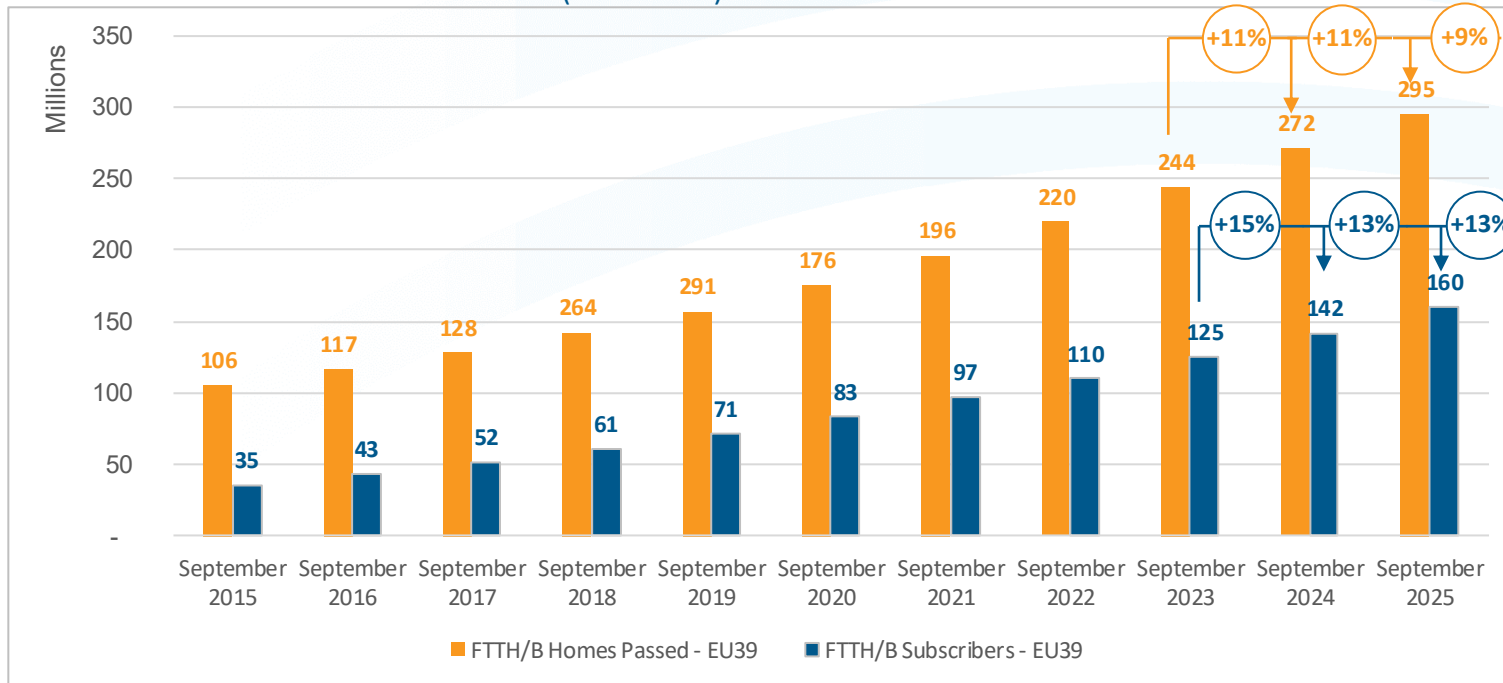
Note: see slide 6 for the definition of the rates

(1) EU39 = EU27+UK + 4 CIS countries + Iceland, Israel, North Macedonia, Norway, Serbia, Switzerland, Turkey

FTTH/B Market Panorama

Key trends as of September 2025

FTTH/B European market evolution in EU39 (1):
In terms of Homes Passed and Subscribers (2015-2025)



- Early signs of a “**coverage plateau**” are emerging, with a visible slowdown in homes passed growth at EU39 level.
- Subscriber growth is still stable, reflecting continued **migration dynamics**.
- The European FTTH/B market is shifting from a phase of rapid expansion to a more mature phase, where growth will become slower.

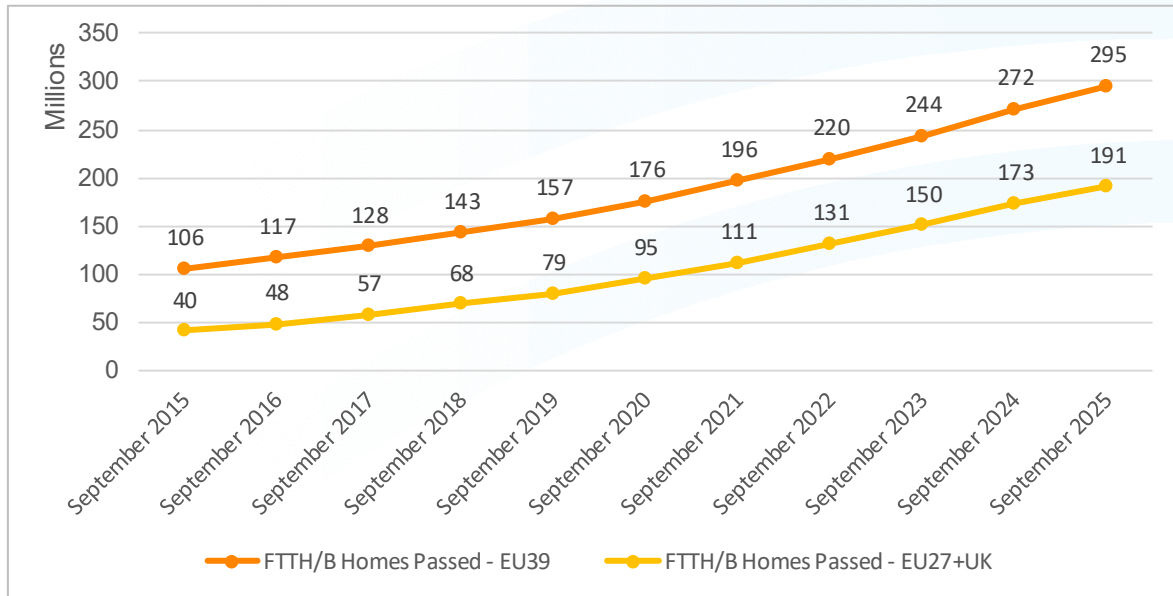
SEPTEMBER 2025	EU 39	EU 27 + UK
Coverage rate	79.3%	76.8%
Coverage rate delta vs 2024	+ 5.8 p.p	+6.7 p.p
Take-up rate	54.4%	54.9%
Take-up rate delta vs 2024	+2.2p.p	+ 2.9 p.p
Penetration rate	43.1%	42.1%
Penetration rate delta vs 2024	+4.8 p.p.	+5.7 p.p.

Note: see slide 6 for the definition of the rates

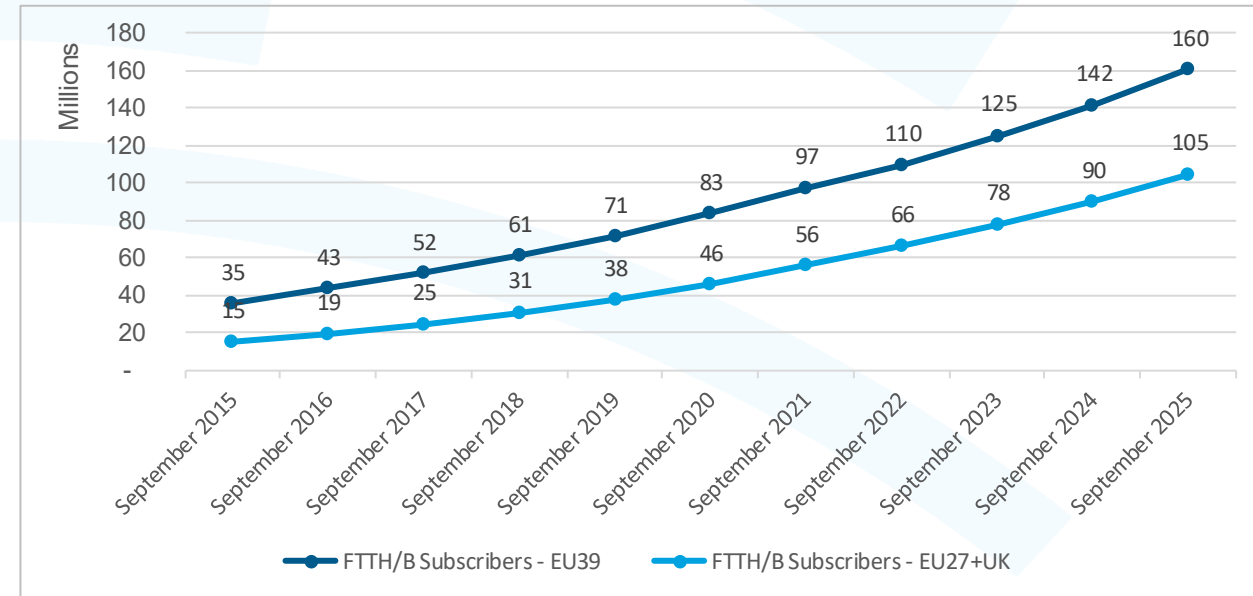
FTTH/B Market Panorama

Market trends (EU27+UK vs. EU39)

Evolution of FTTH/B Homes Passed (million)
Comparison EU27+UK / EU39



FTTH/B Subscribers (million)
Comparison EU27+UK / EU39



Proportion of the total Homes Passed represented by EU 27 + UK

Proportion of the total Subscribers represented by EU 27 + UK

SEPT 2025

64.59%
(+0.98 p.p 2024)

65.22%
(+1.77 p.p 2024)

SEPT 2015

38.10%

42.56%

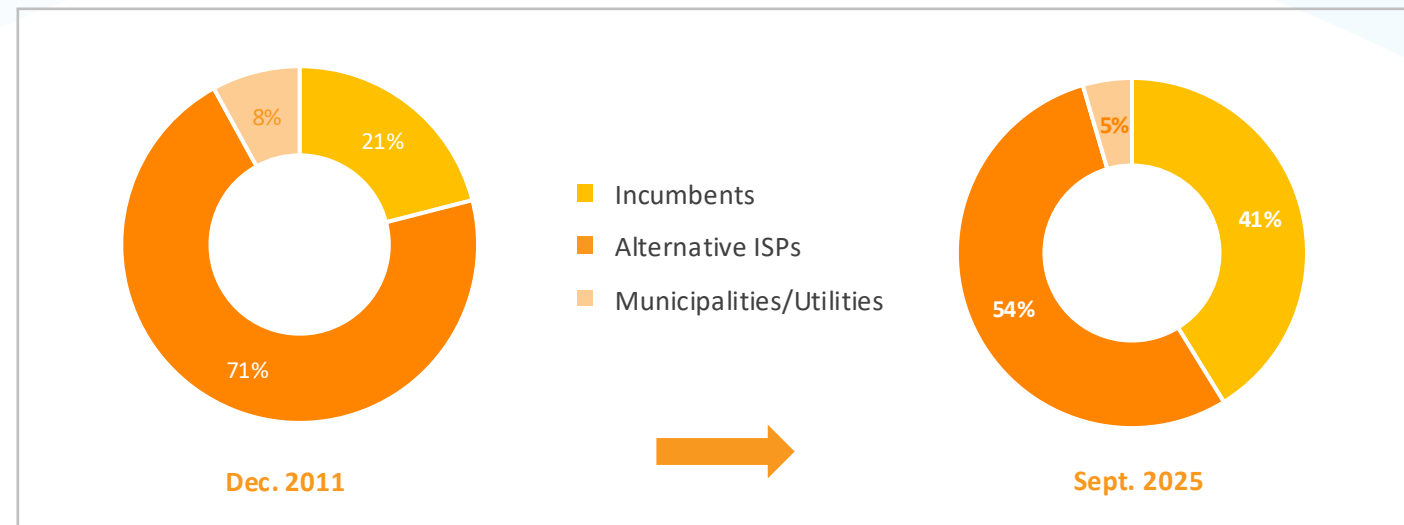
FTTH/B Market Panorama

FTTH/B initiative types

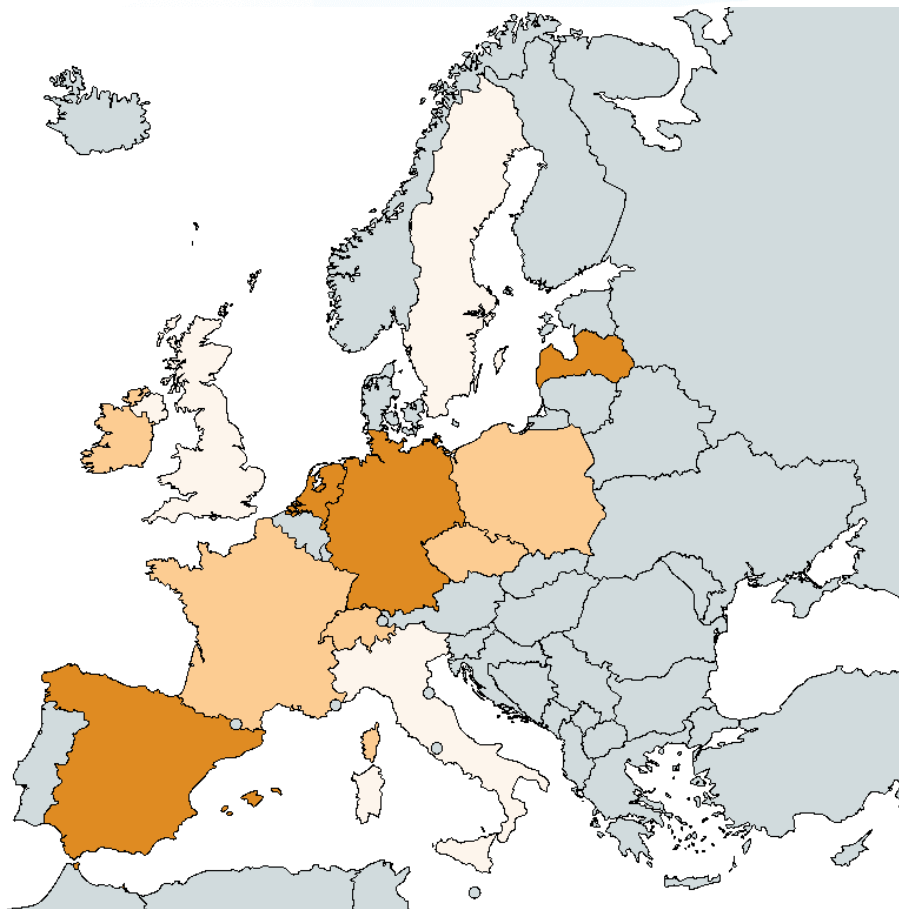
- FTTH/B initiative refers to the number of public and private players who have launched FTTH/B projects since fibre rollouts began.
- Market Status (as of September 2025):
 - Around 430 FTTH/B initiatives identified across EUR39
 - Alternative operators remain the leaders in terms of the number of initiatives, but incumbents are closing the gap.
 - Evolution : In 2011, Alternative ISPs dominated the market, but in recent years, incumbents have significantly narrowed the difference.

Breakdown of FTTH/B Homes Passed by type of player (%)

Data comparison between Dec. 2011 and Sept. 2025



Diverse structural models of FTTH deployment across Europe



● Integrated led markets (>70%) ● Hybrid markets (50-70%) ● Wholesale-only led markets < 50%

- **The FTTH investment model in Europe is heterogeneous**

European markets rely on different structures, ranging from **wholesale-only** driven ecosystems to markets dominated by vertically **integrated operators**.

- **Wholesale-only operators have become key infrastructure investors in several European markets**

In countries such as **Sweden, Italy** and **the UK**, wholesale-only networks account for **more than half** of FTTH homes passed.

- **Vertically integrated operators remain dominant in several large markets**

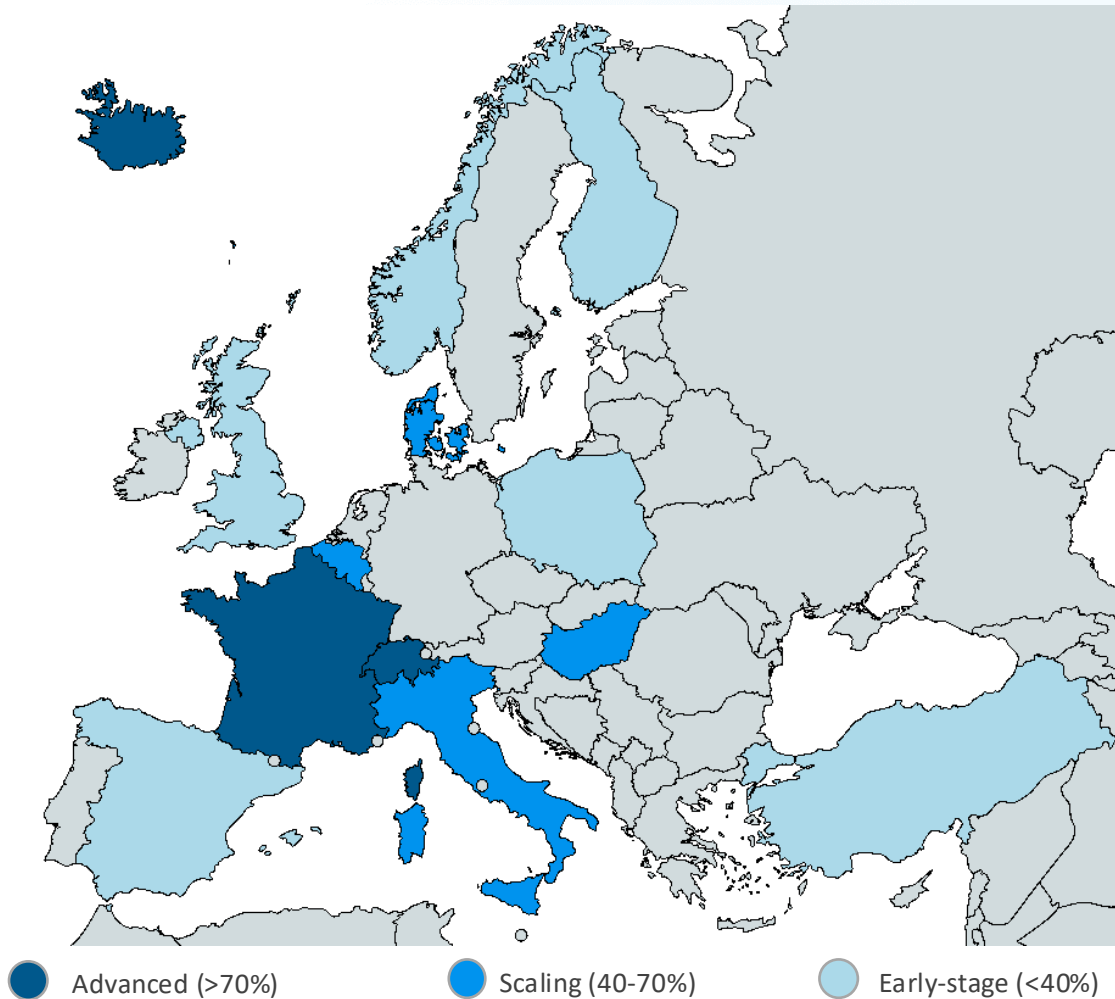
In countries such as **Germany, Spain** and **the Netherlands**, FTTH deployment continues to be primarily led by incumbent or integrated telecom operators.

- **Hybrid market structures are increasingly common**

In several countries (e.g. Switzerland, France, Ireland and Czechia), FTTH investment is **shared** between wholesale-only players and integrated operators.

*Based on a selection of ~12 European markets - Percentages indicate the share of FTTH homes passed deployed by integrated operators

XGS-PON in Europe: FTTH rollout to network capacity upgrades



*Based on a selection of ~12 European markets

- **European FTTH markets are entering a new phase of network evolution.** As FTTH coverage expands, operators are progressively upgrading existing GPON infrastructure to XGS-PON to support higher bandwidth and future service requirements.
- **The pace of XGS-PON adoption varies significantly across European markets.** While some countries already show high levels of XGS-PON deployment, others remain at an earlier stage of transition from GPON.
- **In several markets, XGS-PON is becoming a key layer of FTTH network modernization.** Countries such as **Switzerland (100%), France (75%), Iceland (72%) and Hungary (60%)** illustrate how operators are moving beyond FTTH rollout toward capacity upgrades.
- **In other markets, operators are adopting a more gradual upgrade strategy.** In **Norway (25%), Finland (20%), Turkey (17%) and Poland (15%),** XGS-PON deployment appears more selective, suggesting operators are still leveraging existing GPON assets while targeting upgrades where demand requires higher capacity.

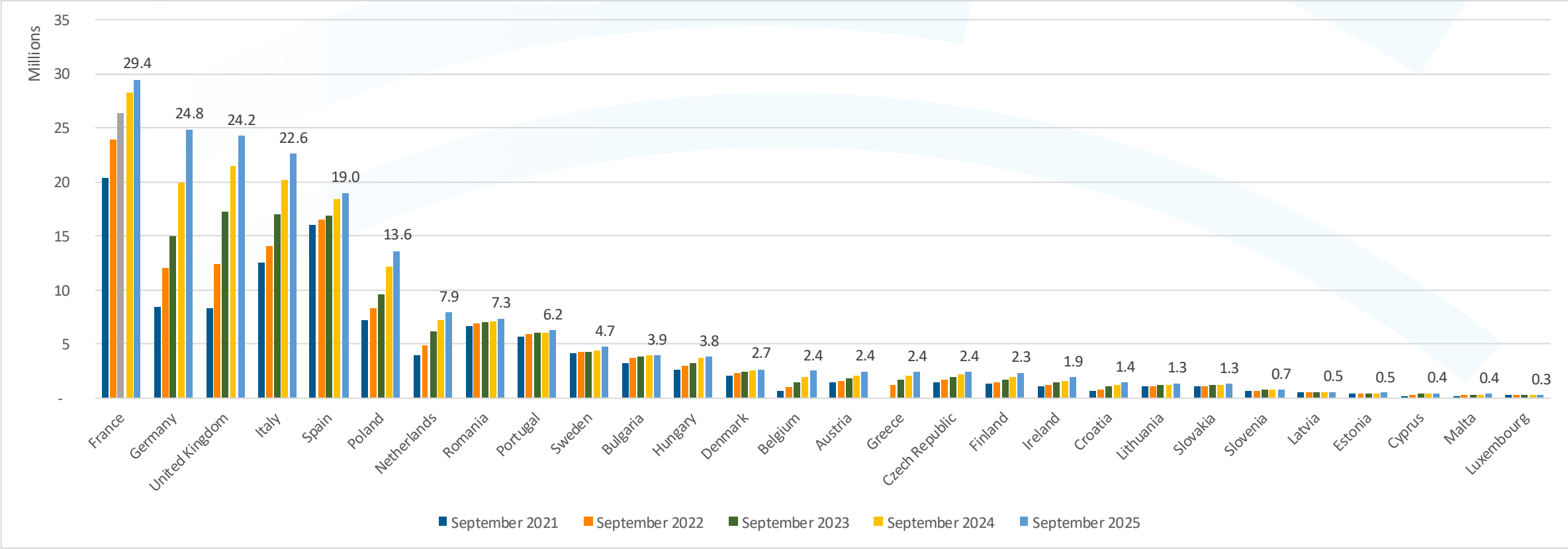
3. FTTH/B Homes passed, Coverage rate and Sockets deployed



FTTH/B Homes Passed – EU27 + UK Ranking

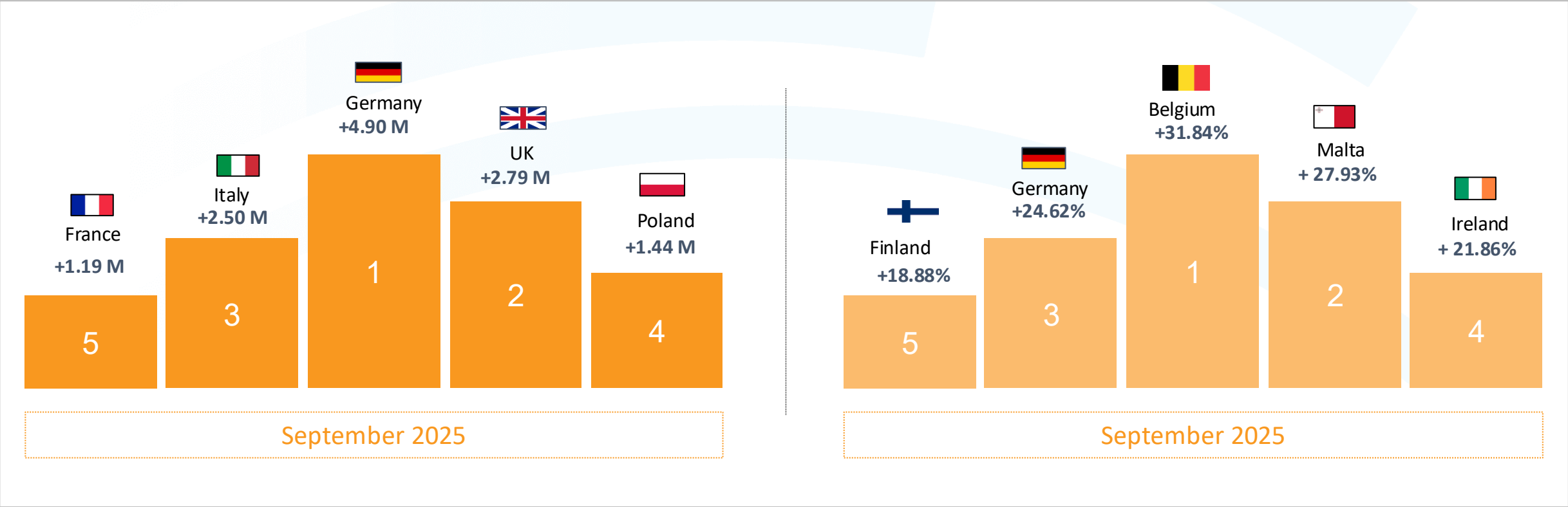
EU27+UK ranking in terms of FTTH/B Homes passed over time (in million homes)

Data comparison between Sept. 2021 and Sept. 2025



FTTH/B Homes Passed – EU27 + UK Ranking

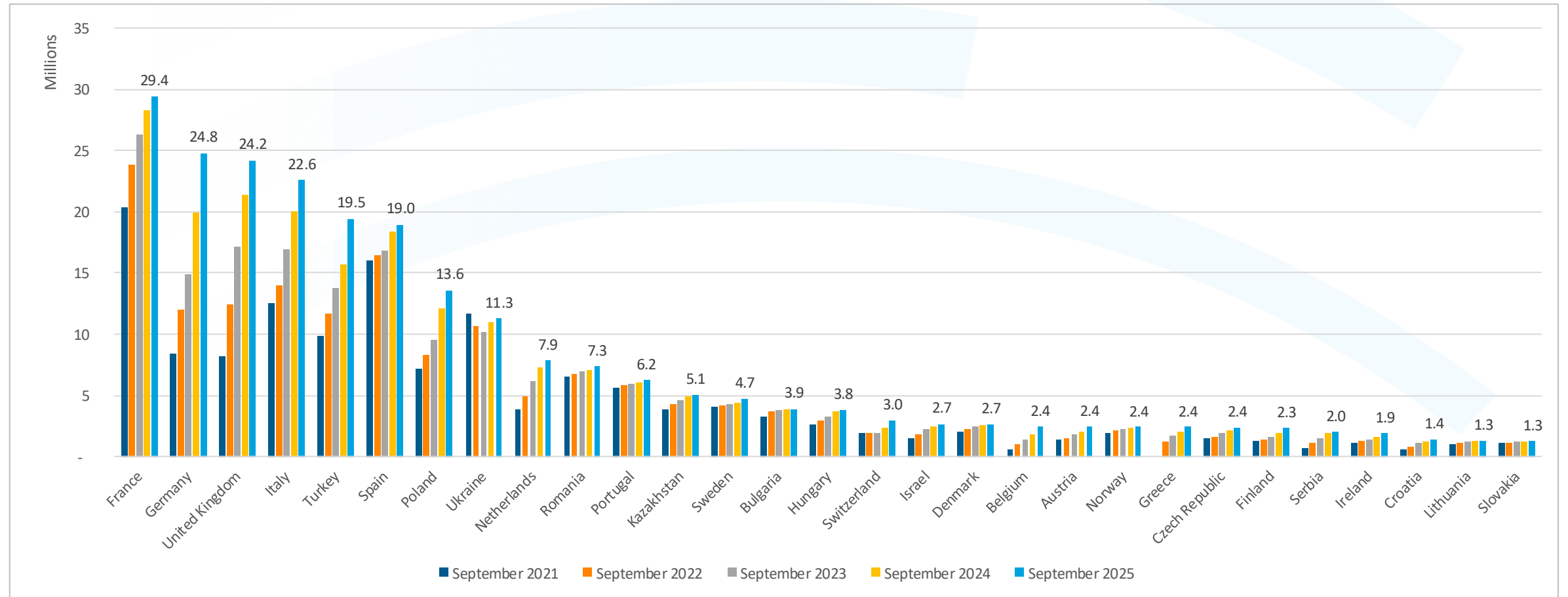
5 fastest growing markets (in both volume and %)
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Homes Passed)



FTTH/B Homes Passed – EU39 Ranking

European ranking in terms of FTTH/B Homes passed, countries with > 1 million homes passed

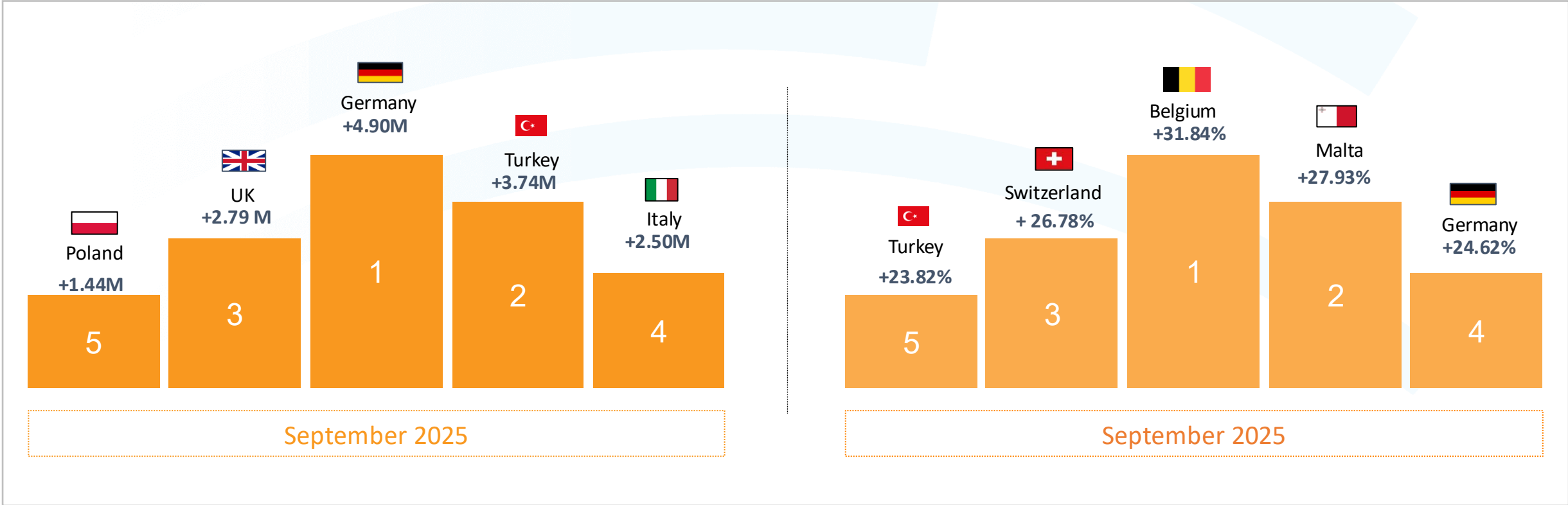
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Homes Passed – EU39 Ranking

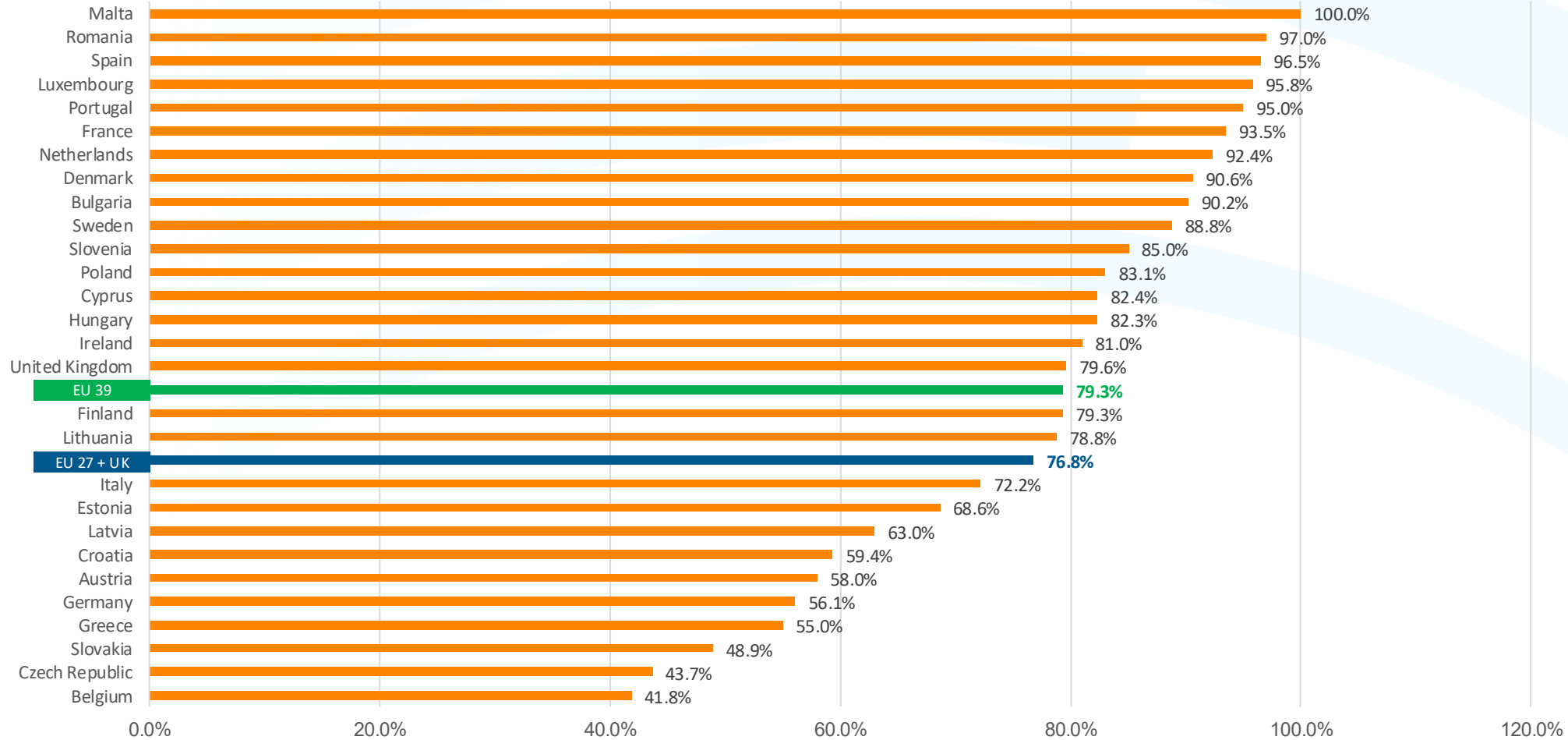
5 fastest growing markets (in both volume and %)

Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Homes Passed)



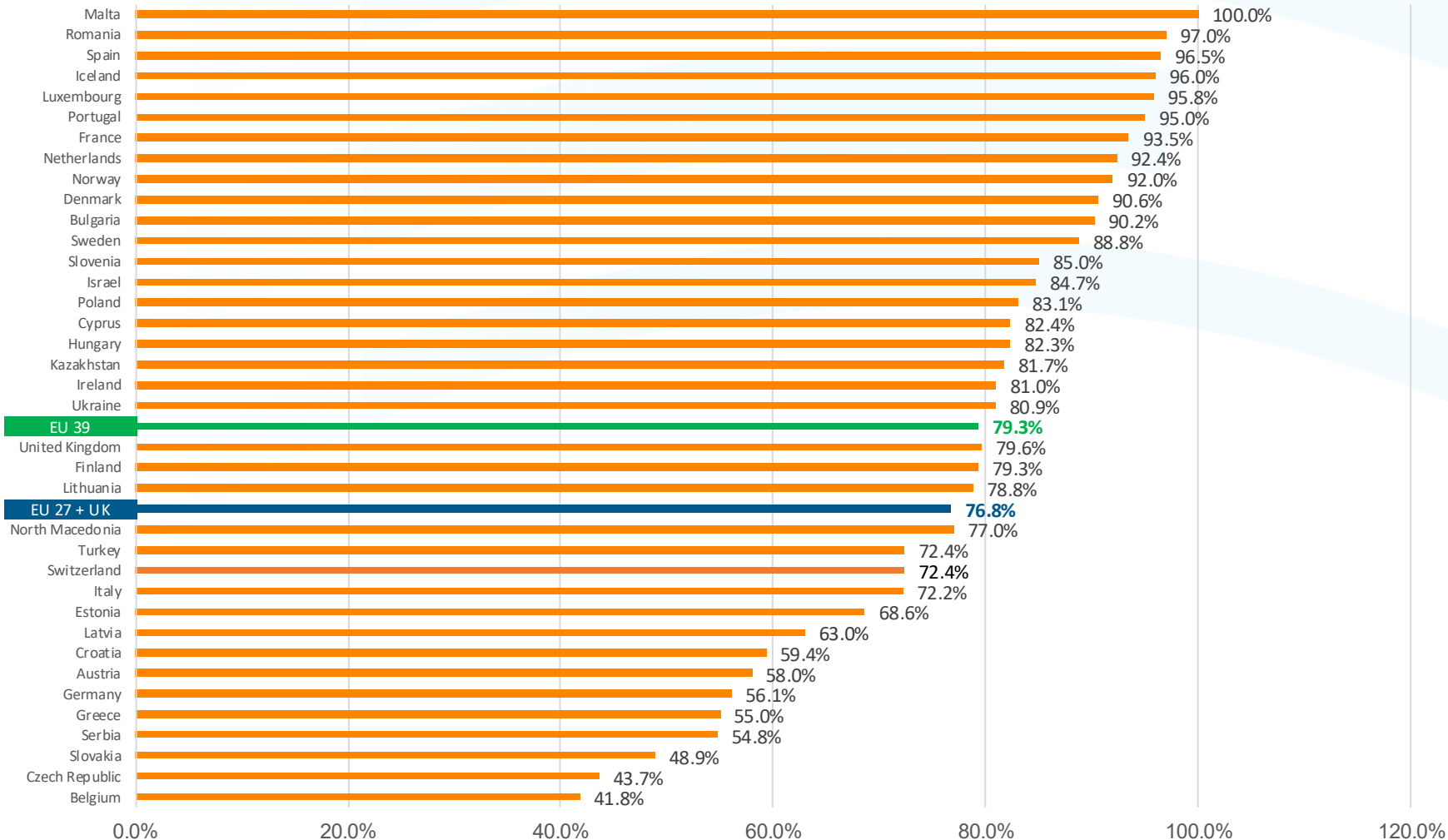
Coverage rate, European leaderboards – EU27+UK

FTTH/B coverage rate (households passed / households) in EU27+UK as of September 2025



Coverage rate, European leaderboards – EU39

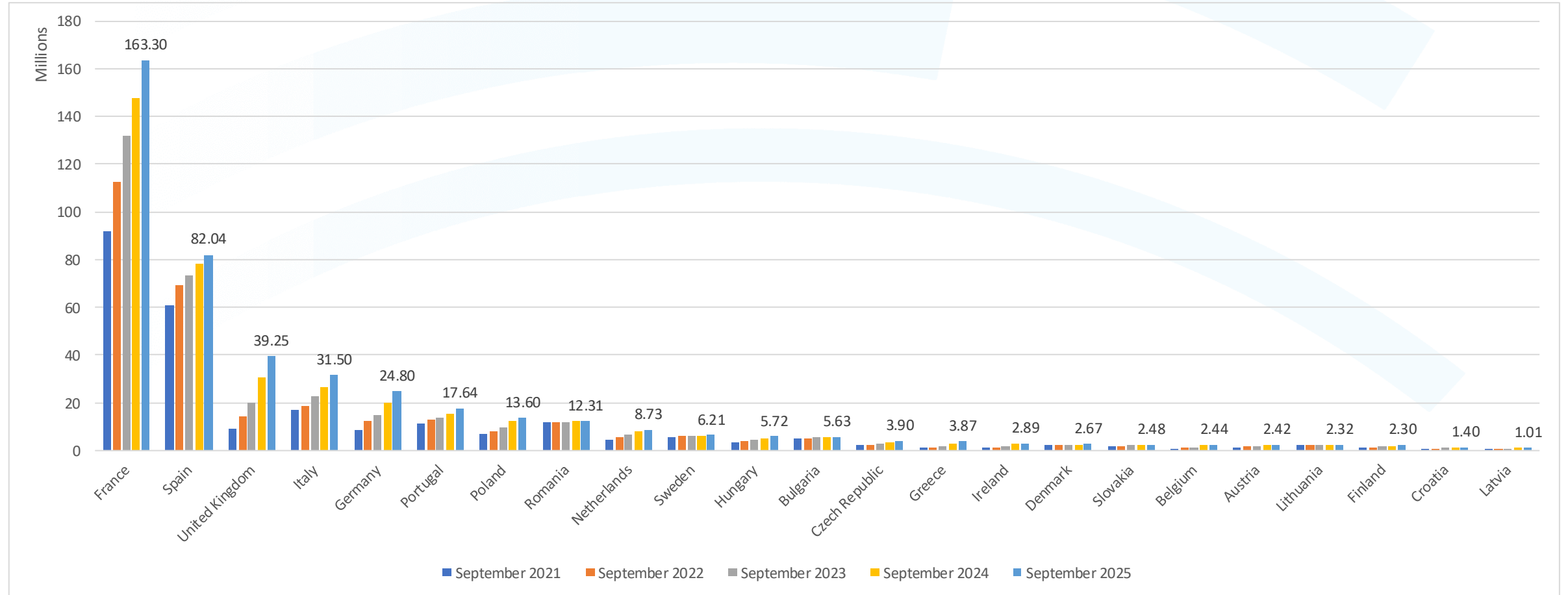
FTTH/B coverage rate (households passed / households) as of September 2025



- FTTH/B coverage reflects diverse national deployment trajectories across EU39, shaped by geography, market structure and policy choices.
- A growing number of countries now exceed the 75–80% coverage threshold, pulling the European average upward.
- High-coverage markets are nearing a practical deployment ceiling, with remaining rollout increasingly concentrated in the most complex areas

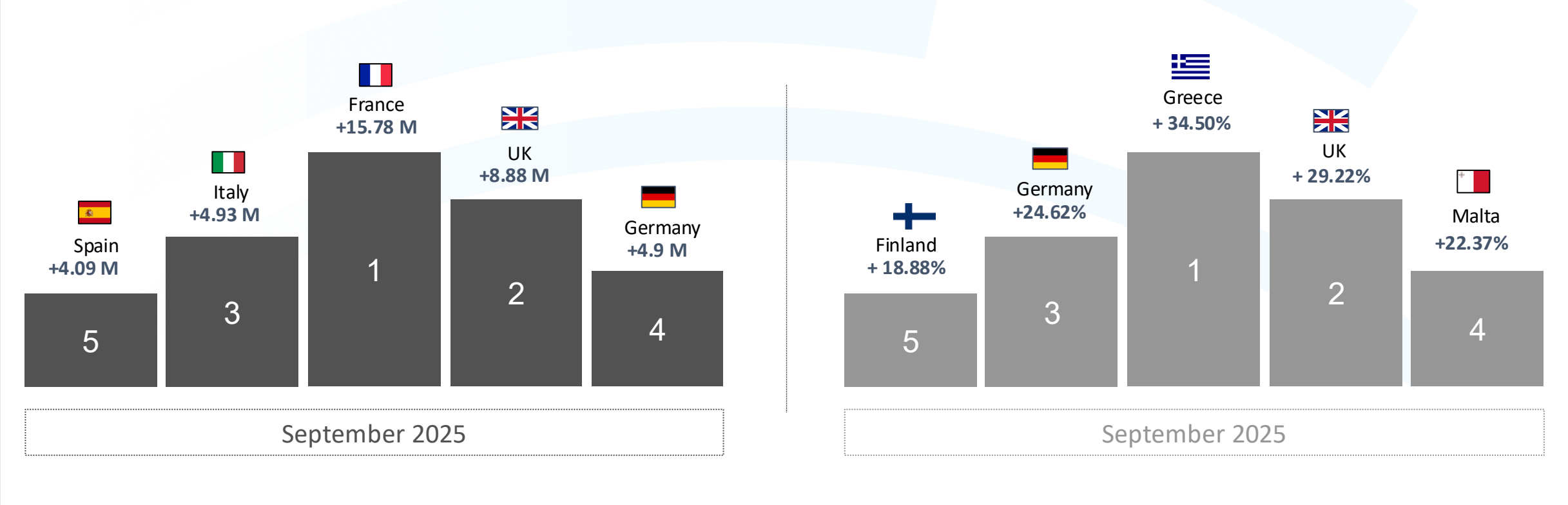
FTTH/B Sockets Deployed - EU27+UK Ranking

EU27+UK ranking in terms of FTTH/B Sockets Deployed, countries with > 1 million sockets deployed
 Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



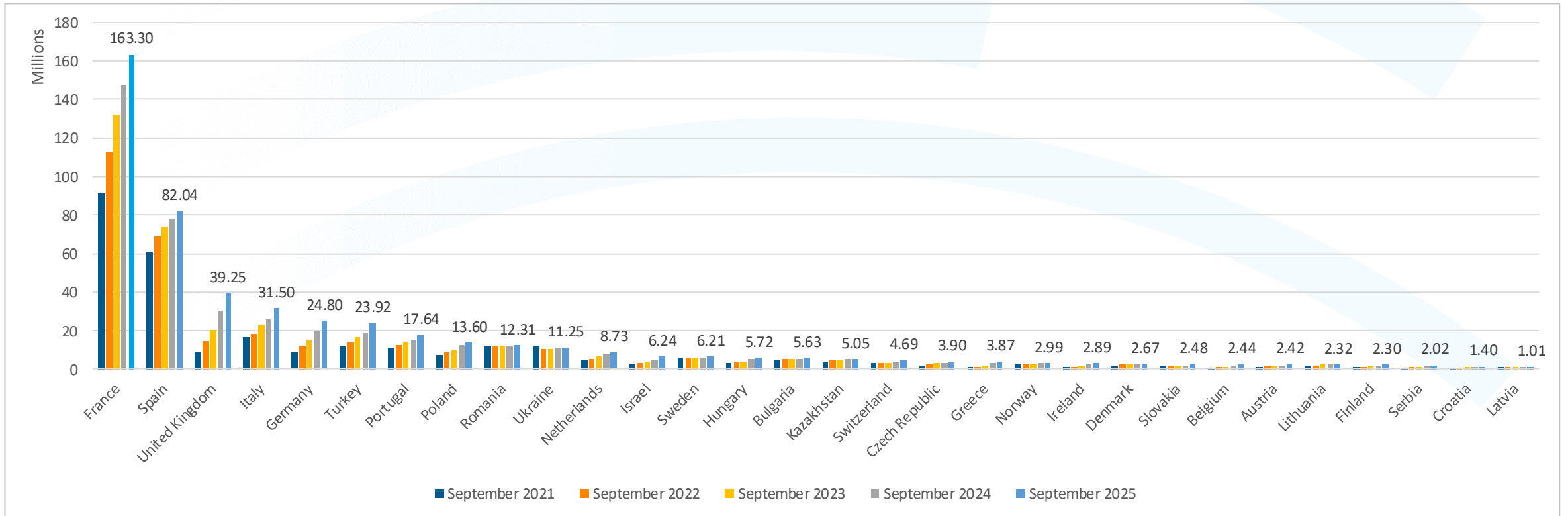
FTTH/B Sockets Deployed - EU27+UK Ranking

5 fastest growing markets (in both volume and %)
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Sockets Deployed)



FTTH/B Sockets Deployed - EU39

EU39 ranking in terms of FTTH/B Sockets Deployed, countries with > 1 million sockets deployed
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Sockets Deployed - EU39

5 fastest growing markets (in both volume and %)

Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Sockets Deployed)

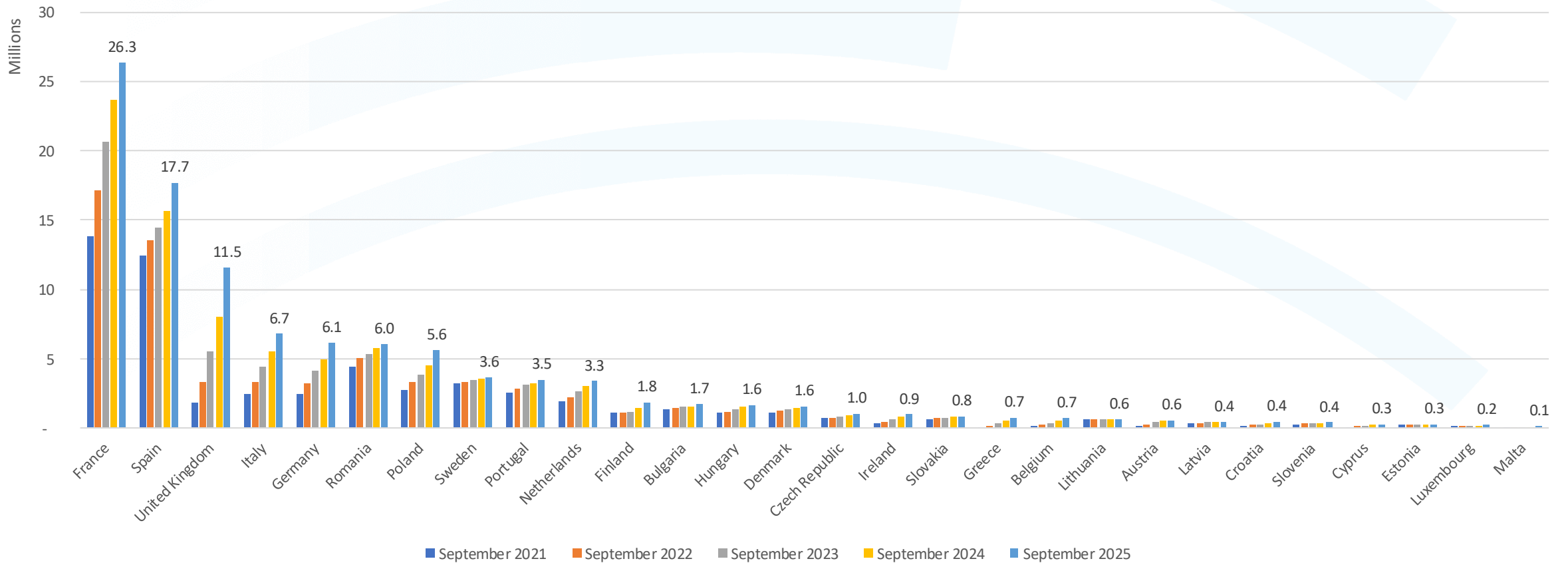


4. FTTH/B Subscribers and Take-up rate



FTTH/B Subscribers – EU27 + UK

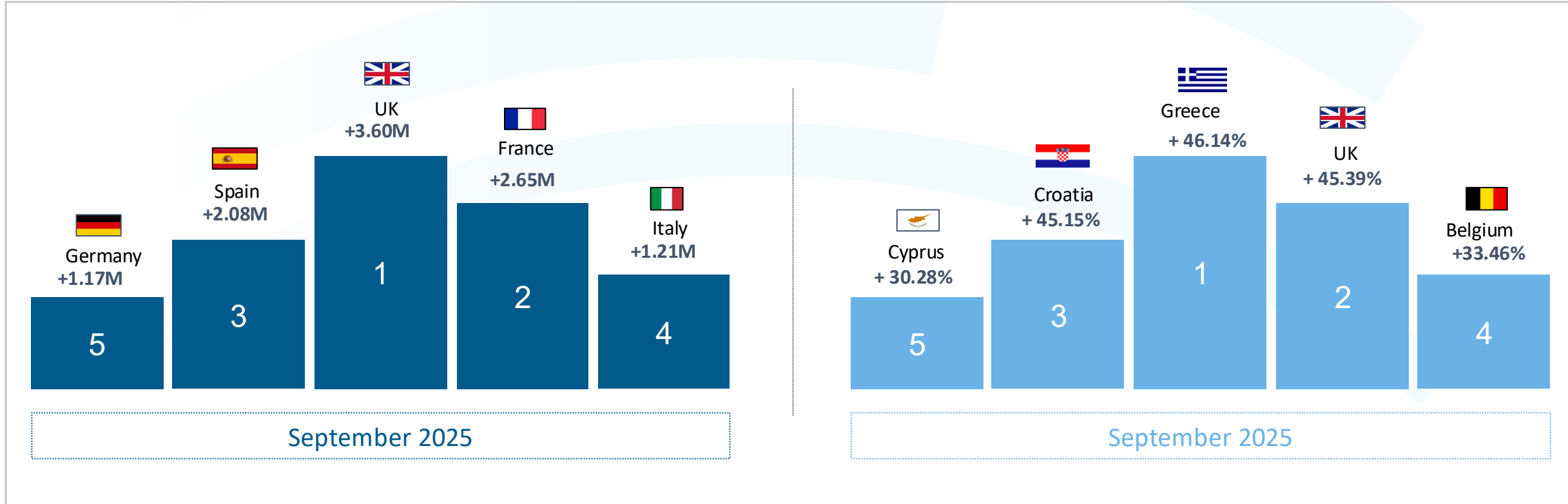
EU27+UK ranking in terms of FTTH/B Subscriptions over time (in thousands homes)
 Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Subscribers – EU27 + UK

5 fastest growing markets (in both volume and %)

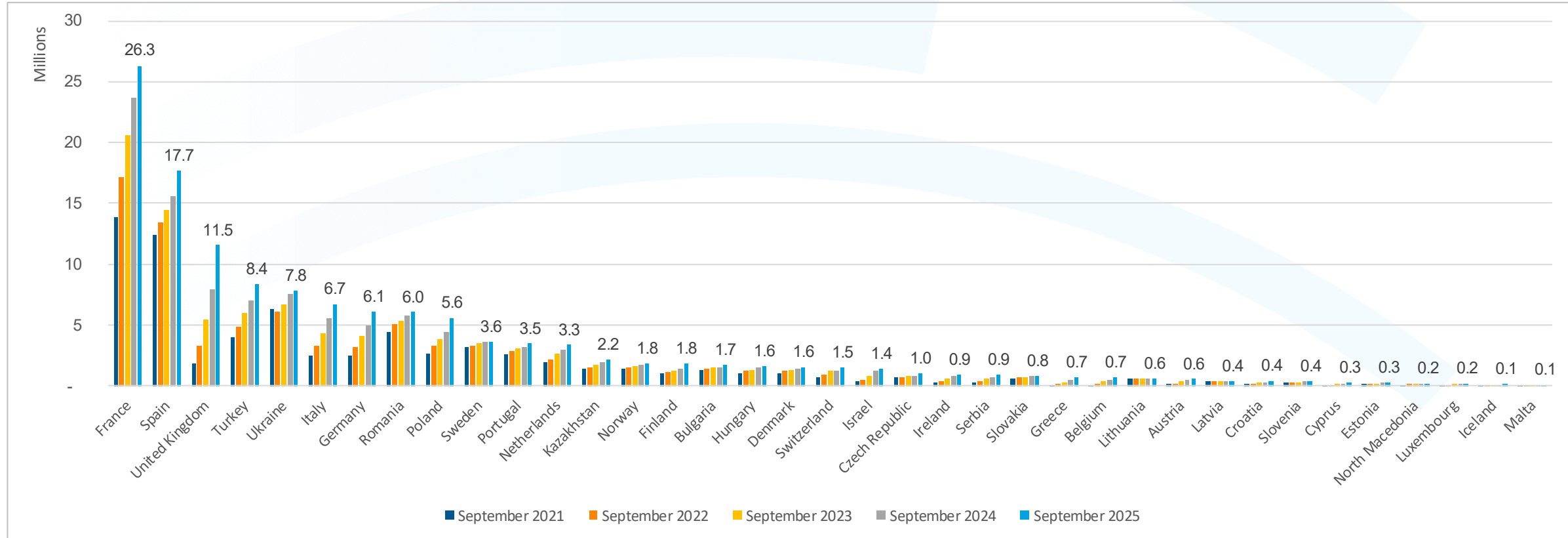
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Subscribers)



FTTH/B Subscribers – EU39

EU39 ranking in terms of FTTH/B Subscriptions over time (in thousands homes)

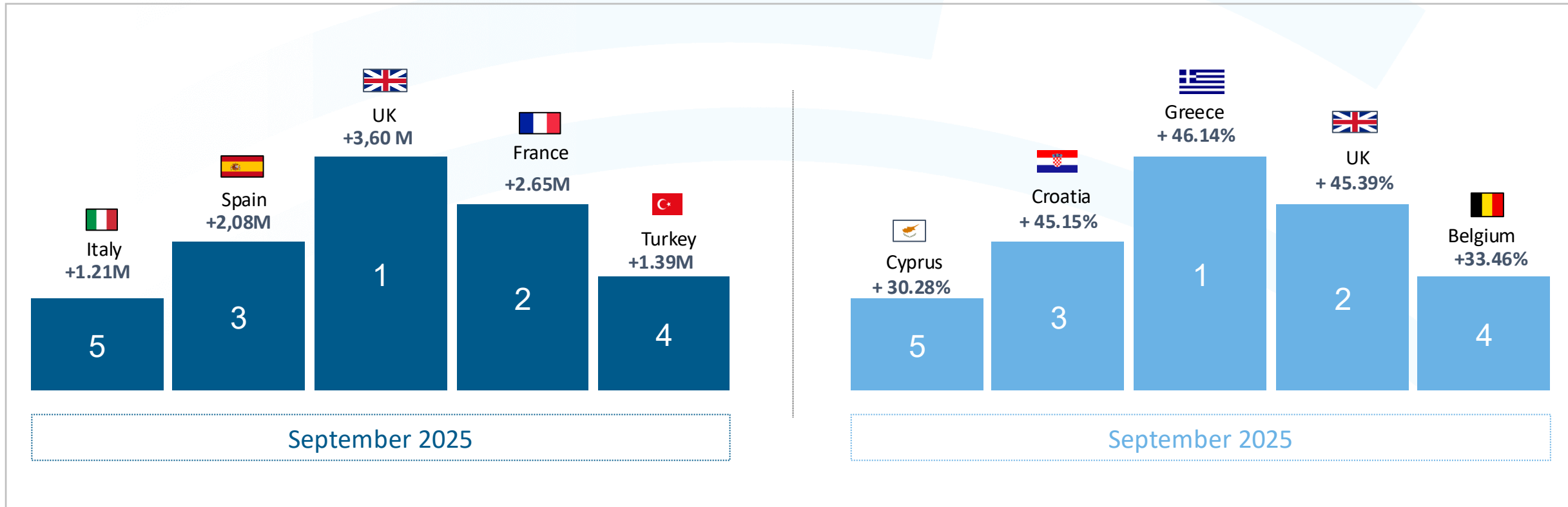
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Subscribers – EU39

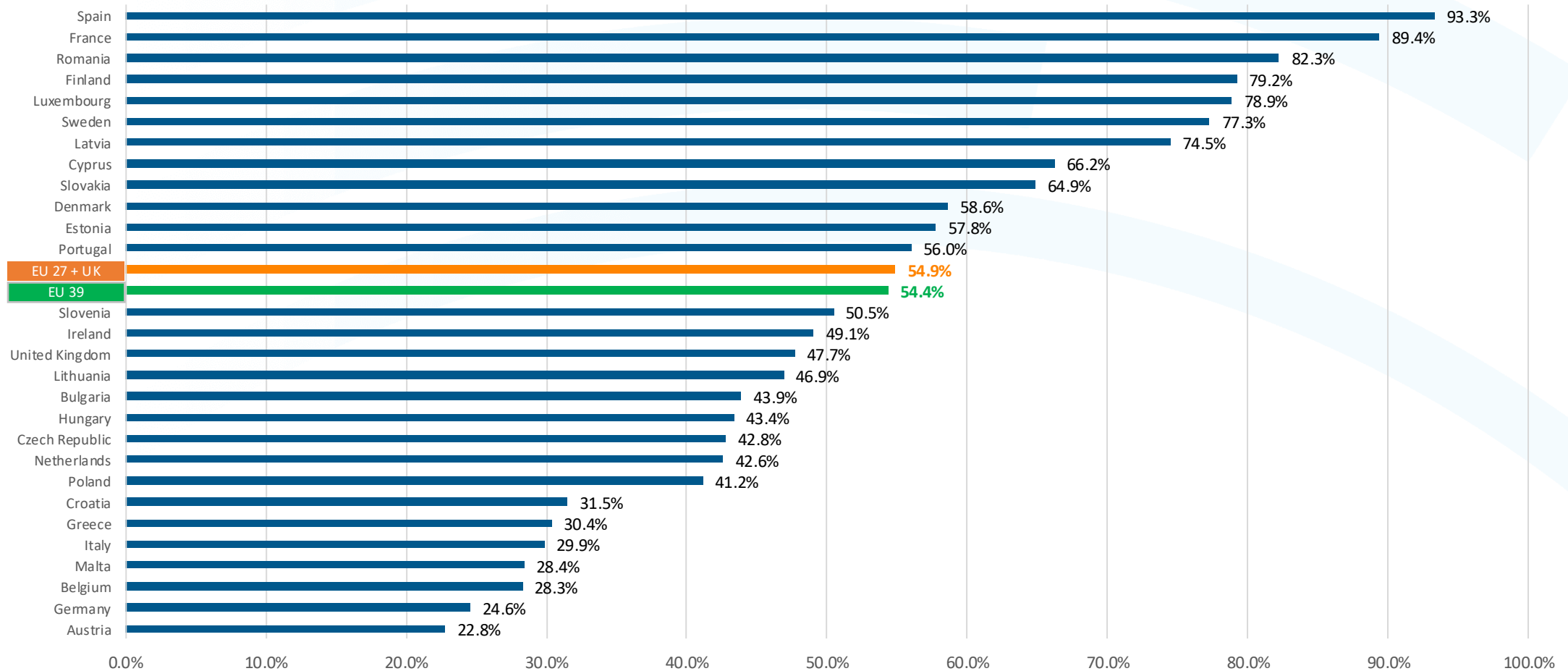
5 fastest growing markets (in both volume and %)

Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Subscribers)



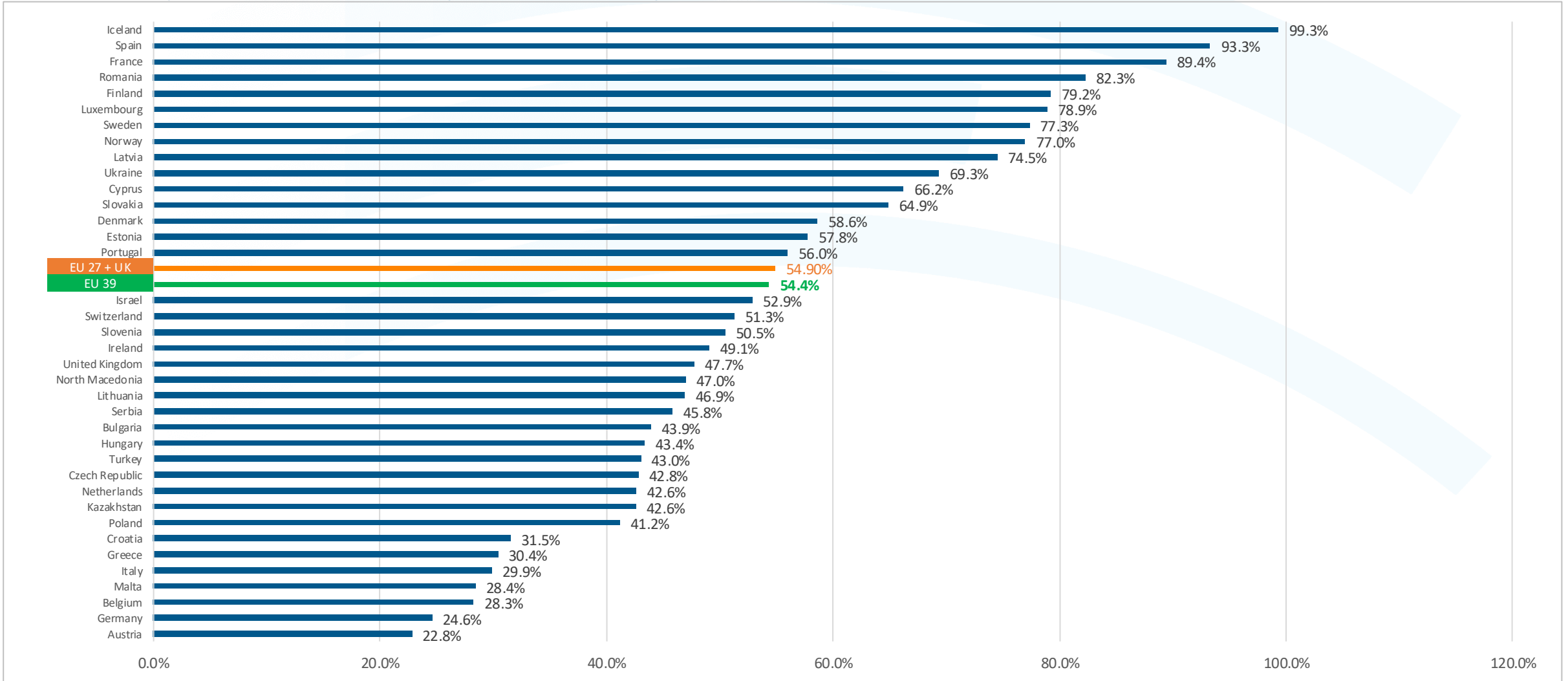
Take-up rate, European leaderboards – EU27+UK

FTTH/B take-up rate (subscribers / households passed) in EU27+UK as of September 2025



Take-up rate, European leaderboards – EU39

FTTH/B take-up rate (subscribers / households passed) in EU39 as of September 2025

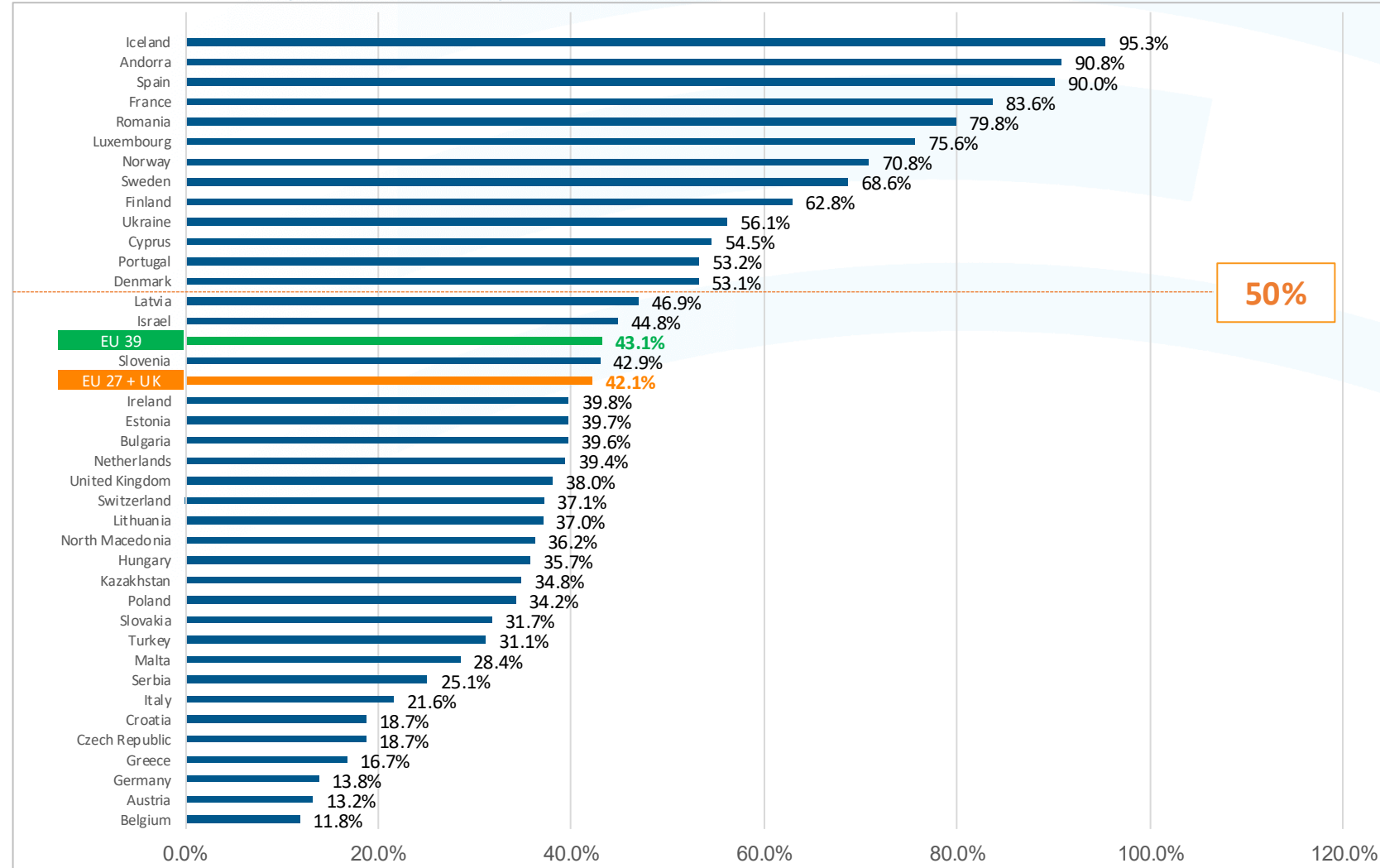


5. FTTH/B Penetration rate



Penetration rate, European leaderboards – EU39

Penetration rates of European countries - September 2025 (Subscribers / Households)



- Fibre penetration **exceeds 50% in only a limited number of European countries**, underlining the remaining adoption effort.
- **Adoption is now the main driver of market convergence**, as network coverage is already largely in place.
- High-penetration countries provide a reference trajectory for the next phase of fibre market development.

6. Who's leading the road to full fibre?



FTTH/B Coverage rate Summary map

FTTH/B coverage rate map (households passed / households) -
September 2025

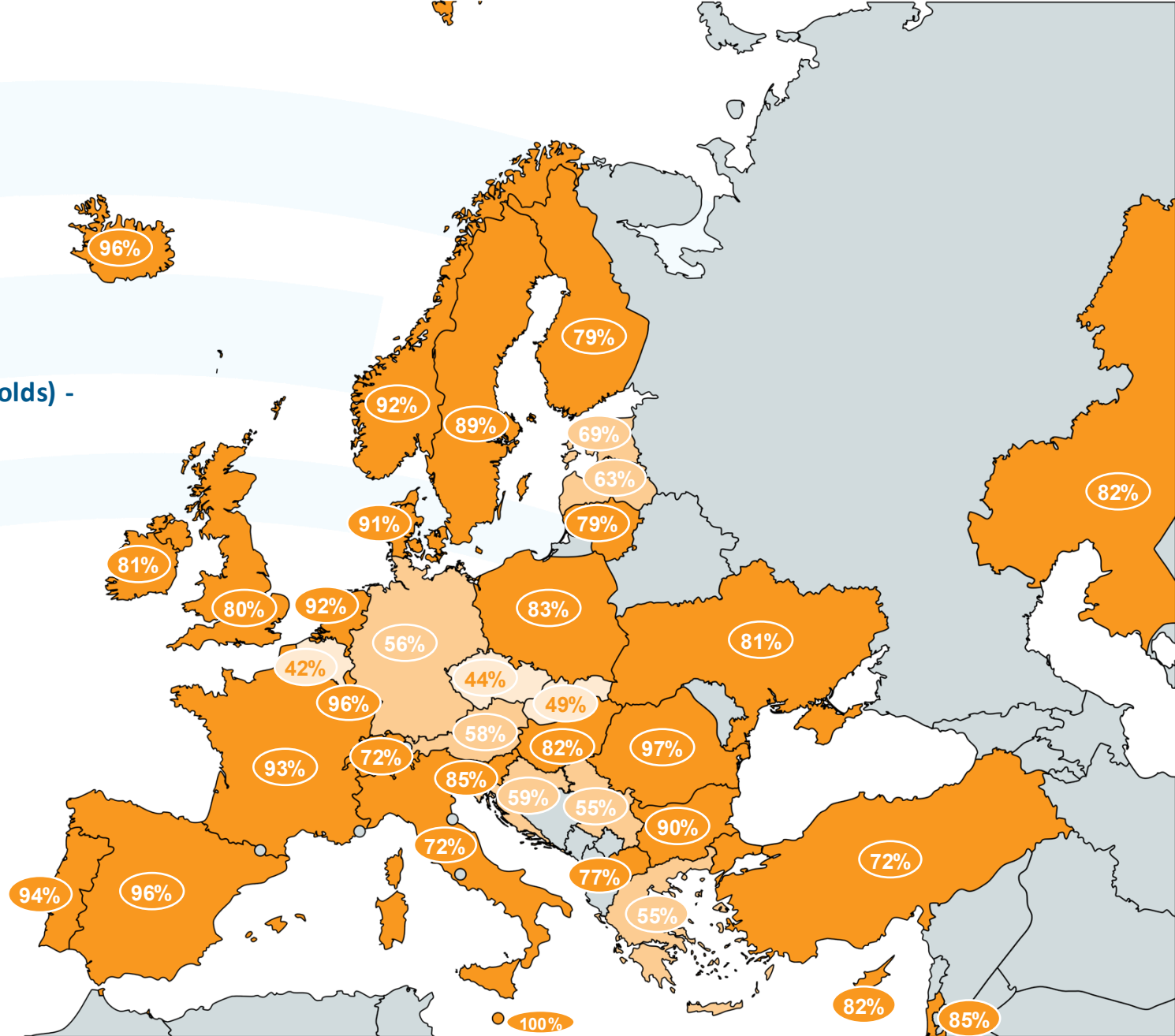


COVERAGE RATE*

EU27+UK: 76.8% (+ 7.1 p.p yoy)

EU39 : 79.3% (+ 6.2 p.p yoy)

- FTTH/B Coverage < 30%
- FTTH/B Coverage 30% > 50%
- FTTH/B Coverage 50% > 70%
- FTTH/B Coverage > 70%

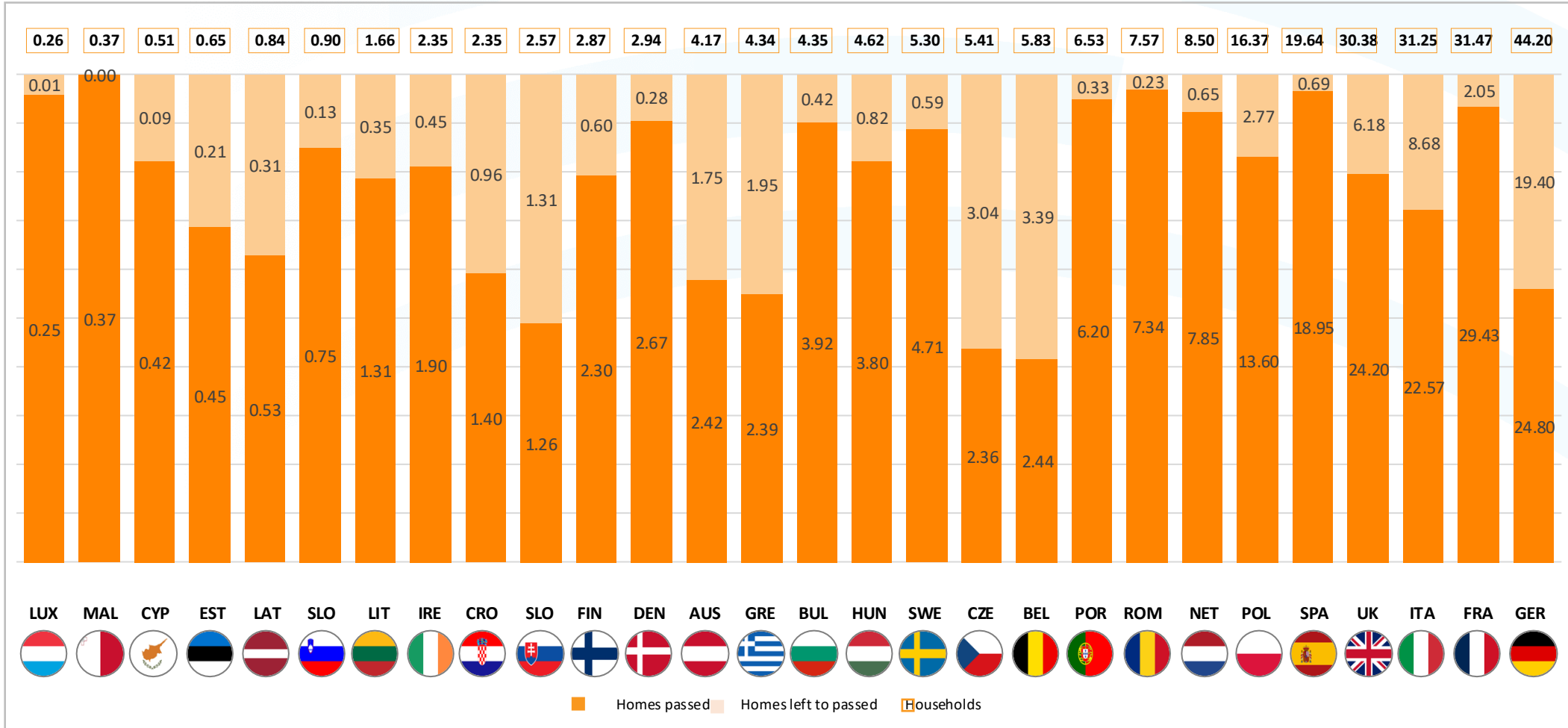


(*): The household base in certain countries has been revised following discussions with key stakeholders. This update affects the calculation of various rates as well as historical data.

The Road to Full Fibre – Who has the most work left to do?



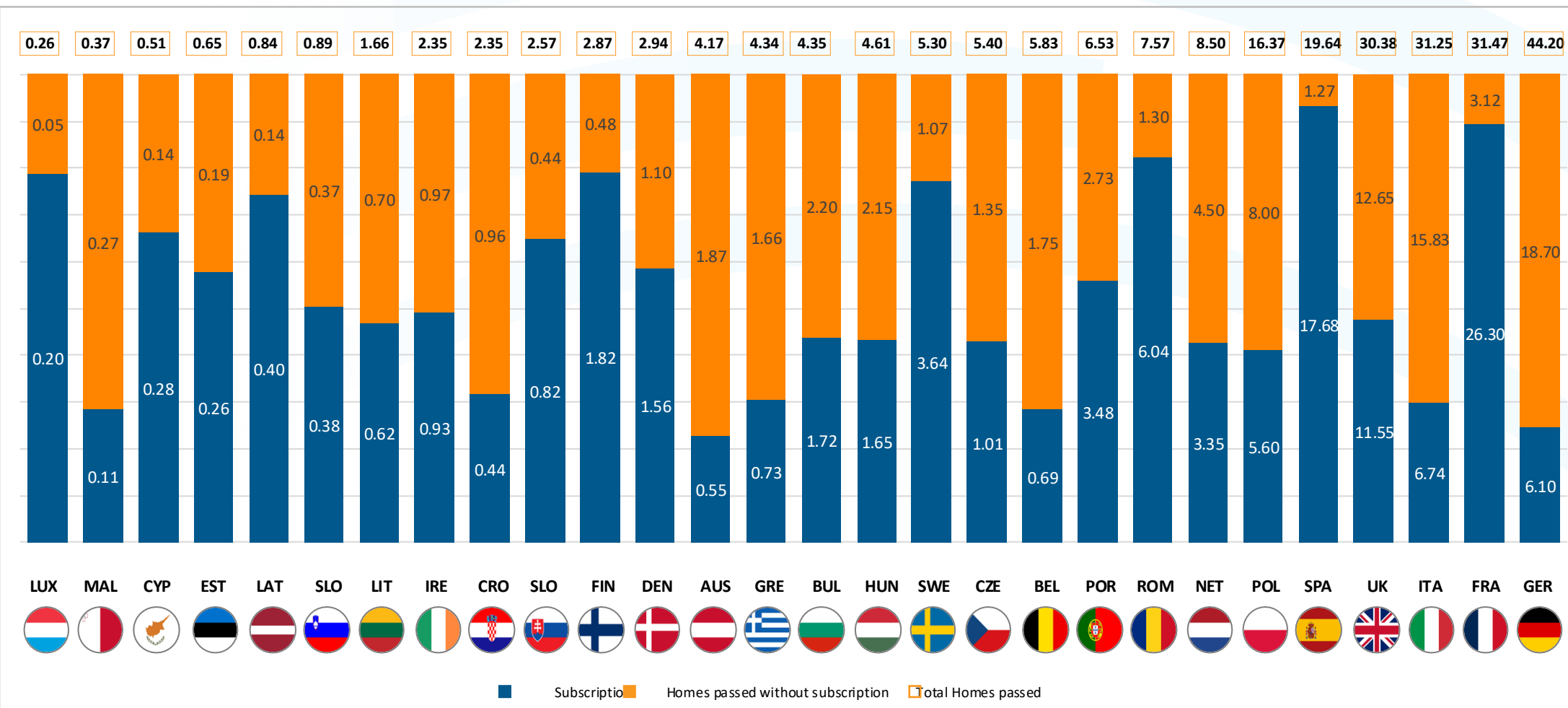
EU27+UK Ranking : Households left to pass, September 2025



- Nearly 20 million households passed this year!
- EU27+UK : 58 million homes left to pass
- Compared to last year, the major laggards have significantly accelerated their deployment.
- Germany, the UK, Poland, and Italy have gone from 50 million households to cover (last year) to 37 million.

Bridging the fibre gap: From coverage to adoption

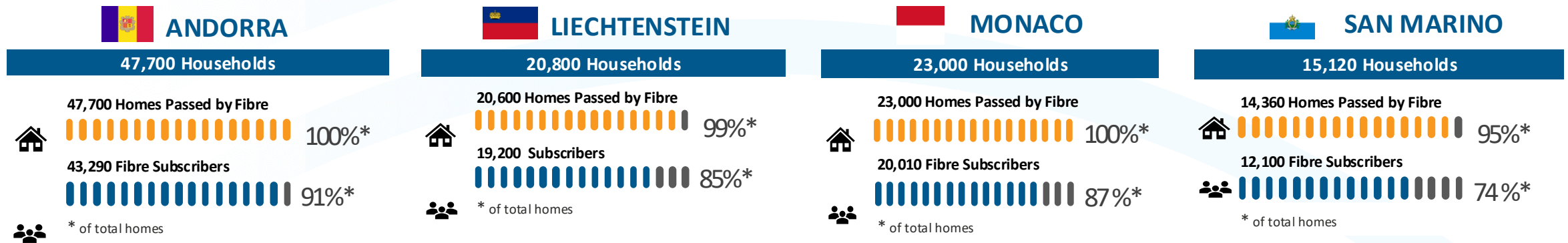
Subscribers vs Homes passed, EU27+UK – September 2025



- EU 27+UK : there are 86 million homes passed without a subscription, representing the 45% of total homes passed in the region
- Italy, Germany, United Kingdom and Poland still have the most homes passed without a subscription

Focus on microstates progress

Microstates are moving forward with FTTH/B deployments



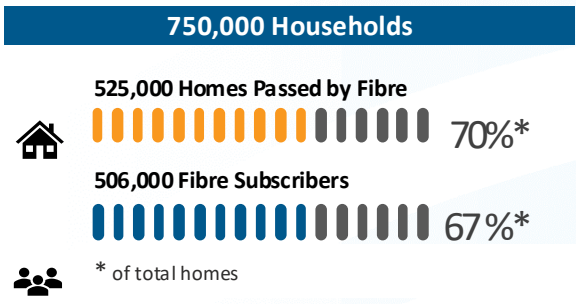


Sept. 2025
 Coverage rate : 50.6%
 Penetration rate : 29.2%
 Take-up rate : 57.7%

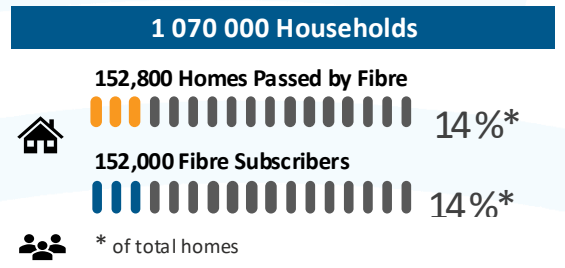
Focus on Balkan region progress

A region in transition, with uneven levels of maturity

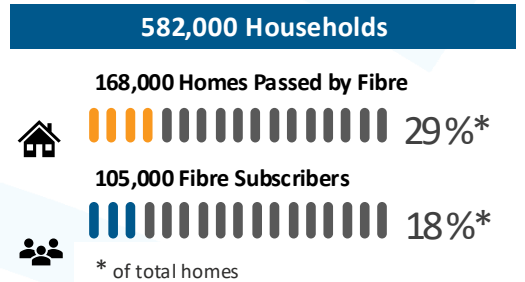
ALBANIA



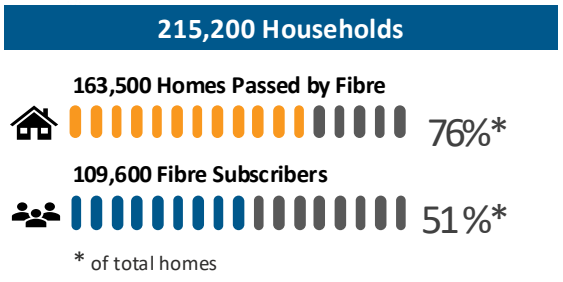
BOSNIA-HERZEGOVINA



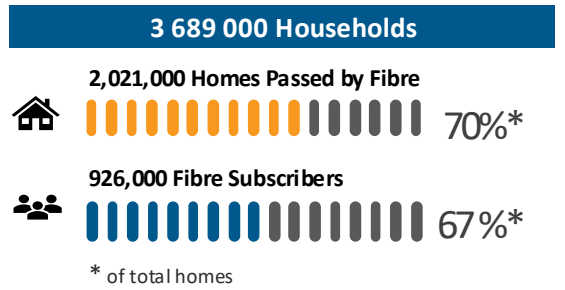
KOSOVO



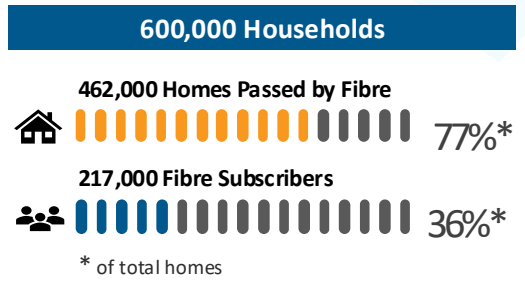
MONTENEGRO



SERBIA



NORTH MACEDONIA



7. FTTH/B Key conclusions



Key conclusions

Coverage

- **EU39: 79.3% coverage** (295 million homes passed). Europe is entering a late-stage rollout phase.
- **EU27+UK: Nearly 20 million new homes passed** this year. Rollout remains concentrated in Germany, Italy, Turkey and the UK.
- Remaining deployments are increasingly **complex** and **costly**.

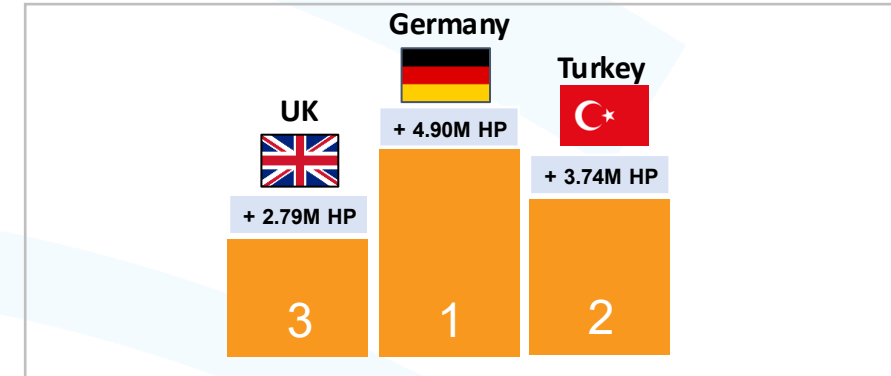
Adoption

- **EU39: 160 million subscribers**, with a **54.4% take-up rate**.
- **EU27+UK: Around 130 million homes passed** remain unsubscribed, confirming that adoption is now the main challenge.
- Growth is increasingly driven by migration from legacy networks.

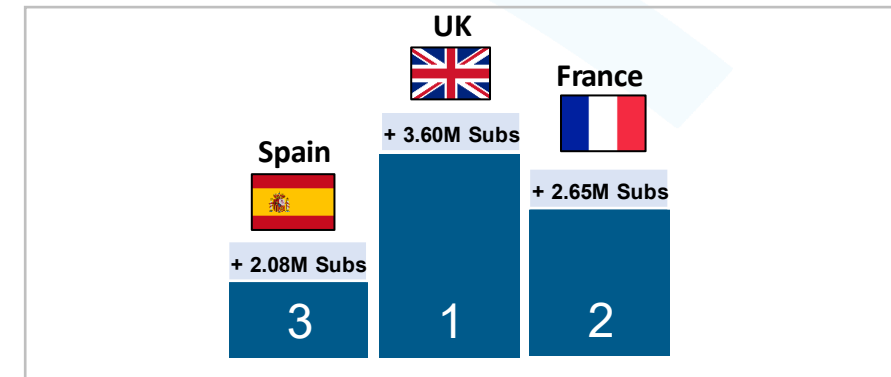
Market shift

- The European FTTH/B market is transitioning from **coverage** expansion to **monetization** and take-up acceleration.

Top 3 - Main movers in terms of Homes Passed in absolute numbers
EU 39



Top 3 - Main movers in terms of subscribers in absolute numbers
EU39



Thank you for your attention!

FTTH Council Europe asbl

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