

State of Fibre: updated Market Forecasts 2021 - 2026 revealed with an overview of fibre deployment in rural areas

- New forecasts anticipate 302 million homes passed with FTTH/B by 2026 for EU39, of which EU27+UK will account for 197 million representing a 67% increase compared to 2021 numbers.
- Number of subscribers expected to reach 135 million in 2026 for EU27+UK from 60 million in 2021 and 197 million for EU39 (from 99 million) while take-up rate would continue to increase to 68,7% and 65,3% respectively. (from 51,1% and 48,5% in 2021)
- Germany, UK and Italy confirm their huge growth potential and are joined by the Netherlands.
- Urban/rural divide remains a challenge with only 22% of rural inhabitants enjoying full-fibre connectivity, compared to 45% for all territories in EU27+UK.

15 September 2021. Today at the FTTH virtual Conference 2021, the FTTH Council Europe released two reports: the latest figures of the [FTTH Forecasts](#) for 2021 and 2026 and an [overview of fibre deployments in rural areas](#).

FTTH Forecasts for 2021 and 2026

The market forecasts cover 39 countries¹ and provide an individual analysis for 15 countries². Numbers are consistent with previous estimates and plan for around **197 million homes passed for FTTH/B in 2026 in EU27+UK** compared to 118 million this year, with Germany, the United Kingdom, the Netherlands and Italy to experience the most remarkable growth.

According to the forecasts, the number of **subscribers would reach 135 million in 2026 for EU27+UK and 197 million for EU39**. Our estimates also show that in 2026, **the FTTH/B take-up rate³ for EU27+UK will be slightly higher (68,7%) than for EU39 (65,3%)**, both experiencing a steady evolution over the years.

Several factors have played a role in fostering the deployment of networks. The Covid crisis led to more data traffic and more demand, which has resulted in private investors boosting considerably their deployment projects in favour of FTTH/B to support the ongoing traffic increase. Adding to this, the launch of national programmes (infrastructures and digitalisation) and new European digital targets for 2025 and 2030 will lead to the acceleration of full-fibre connectivity across all European countries.

*"This trend will be intensified by new usage patterns which are encouraging operators to migrate to FTTH solutions, capable of delivering new services while contributing to the sustainability challenge" **said Vincent Garnier, Director General of the FTTH Council Europe.** "The report shows there is still a massive growth potential in terms of connectivity in many EU countries, but overall deployment is progressing at a rapid pace. However, even with the infrastructure in place, the FTTH Council Europe considers that there is still a long way to go to reach a fully digitised society. We strongly believe that to embrace the next digital decade and shape Europe's digital transformation by 2030, take-up is the next challenge, and we call on policy-makers to take the necessary measures for end-users to benefit from the world of new possibilities offered by full-fibre connectivity."*

¹ Andorra, Austria, Belarus, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Kazakhstan, Latvia, Lithuania, Luxembourg, Malta, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine and United Kingdom

² Belarus, France, Germany, Italy, Kazakhstan, Netherlands, Poland, Portugal, Romania, Russia, Spain, Sweden, Turkey, Ukraine, UK

³ Take-up rate=Subscribers/Homes Passed

NB: The presentation about the Market Panorama 2021 (figures from September 2020 presented at a webinar in May 2021) is available [here](#), the European ranking [here](#) and the corresponding press release [here](#).

The FTTH Council Europe's definition of terms can be downloaded [here](#).

Fibre deployments in rural areas

For the first time, the FTTH Council Europe also launched this year [the first official report about full-fibre in rural Europe](#), which provides a general overview of the goals, actions and results of FTTH deployments in rural areas in a selection of 10 EU countries ⁴. **While more than two-third of rural households currently have an NGA ⁵ access; FTTH/B coverage is still lagging behind in non-dense areas with only 22% households covered, compared to 45% for all territories in EU27+UK.**

FTTH/B is progressively deployed, but at a very different pace amongst the countries under study. **While Spain is championing the ranking with 60,5 % rural FTTH/B coverage in 2020, Germany has still a long way to go with only 9.8% covered. However it is worth noting that this represents a higher proportion of rural homes than the EU average and indicates a more balanced rollout across rural and urban areas of Germany.**

"The FTTH Council Europe believes that rural areas should benefit from the same services as urban areas and therefore public funds should help bridging this digital divide where private financing is not possible due to the lack of business case. However to make the most use of public money, only full-fibre projects should qualify for fundings as it is the most future-proof and environmentally friendly infrastructure"
indicated Eric Festraets, President of the FTTH Council Europe.

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About the FTTH Council Europe

The [FTTH Council Europe](#) is an industry organisation with a mission to advance ubiquitous full fibre-based connectivity to the whole of Europe. Our vision is that fibre connectivity will transform and enhance the way we live, do business and interact, connecting everyone and everything, everywhere.

Fibre is the future-proof, climate-friendly infrastructure which is a crucial prerequisite for safeguarding Europe's global competitiveness while playing a leading global role in sustainability.

The FTTH Council Europe consists of more than 150 member companies.

⁴ France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, United Kingdom

⁵ Next Generation Access includes the following technologies: FTTH, FTTB, Cable Docsis 3.0, VDSL and other superfast broadband (at least 30 Mbps download)