Bern, 19. März 2025
Medienmitteilung

Schweizer Glasfaserabdeckung im europäischen Vergleich – Fortschritte, aber noch Luft nach oben

Die neuesten Zahlen des FTTH Council Europe zeigen, dass die Schweiz beim Glasfaserausbau Fortschritte macht, aber im europäischen Vergleich noch Aufholbedarf hat. Mit einer FTTH-Abdeckung von 58 % (von 4,07 Millionen Haushalten gem. BFS) liegt die Schweiz unter dem europäischen Durchschnitt von 75 %. Die Nutzungsrate von Glasfaseranschlüssen (Take-up Rate) liegt bei 54 %, was im Mittelfeld europäischer Länder platziert ist. Diese Zahlen verdeutlichen, dass weitere Anstrengungen nötig sind, um den Anschluss an die europäischen Spitzenreiter nicht zu verlieren.

Die Swiss Fibre Net AG (SFN AG) begrüsst die Fortschritte, betont aber, dass die Schweiz im internationalen Vergleich noch deutlich zurückliegt und weitere Massnahmen notwendig sind.

Andreas Waber, CEO der Swiss Fibre Net AG, kommentiert:
«Die aktuellen Zahlen des FTTH Council Europe zeigen, dass die Schweiz beim Glasfaserausbau Fortschritte macht, aber im europäischen Vergleich noch Aufholbedarf hat. Länder wie Portugal, Spanien und Frankreich haben bereits über 90 % Abdeckung erreicht, während die Schweiz bei 58 % liegt. Das ist ein Zeichen, dass wir nicht nachlassen dürfen, um den Anschluss an die europäischen Spitzenreiter nicht zu verlieren. Die digitale Transformation und die Wettbewerbsfähigkeit unseres Landes hängen direkt von einer leistungsfähigen Infrastruktur ab.»

Die Schweiz im europäischen Vergleich:

- **FTTH-Abdeckung:** 58%(EU39-Durchschnitt: 75%)
- **Take-up Rate:** 54%(EU39-Durchschnitt: 53%)
- **Penetrationsrate:** 31%(EU39-Durchschnitt:40%)

Diese Zahlen zeigen, dass die Schweiz zwar Fortschritte gemacht hat, aber im Vergleich zu Ländern wie Portugal (91 % Abdeckung) oder Spanien (89 % Abdeckung) noch deutlich zurückliegt. Hinter der Schweiz liegen allerdings noch Österreich (50% Abdeckung) und Deutschland (42%)

Weiterer Handlungsbedarf:
Die SFN AG sieht die Notwendigkeit, den Glasfaserausbau weiter zu beschleunigen. Die aktuellen Pläne des Bundesrats, mit einem Breitbandförderungsgesetz Fördermittel ab 2028 bereitzustellen, könnten zu spät kommen. Die digitale Transformation erfordert kontinuierliche Investitionen in die Infrastruktur, um die Wettbewerbsfähigkeit der Schweiz zu sichern und den digitalen Graben zwischen urbanen und ländlichen Regionen zu schliessen.

Andreas Waber fügt hinzu:
«Die digitale Kluft zwischen städtischen und ländlichen Gebieten bleibt eine Herausforderung. Während in den urbanen Zentren der Schweiz eine gute Abdeckung mit FTTH-Glasfasern vorhanden ist, sind ländliche Gebiete und Bergregionen weiterhin unterversorgt. Hier müssen wir ansetzen, um sicherzustellen, dass alle Bürgerinnen und Bürger der Schweiz Zugang zu schnellem und zuverlässigem Internet haben.»

FTTH-Glasfasernetze als nachhaltige Lösung:
FTTH-Netze sind nicht nur die schnellste, sondern auch die ökologisch nachhaltigste Technologie für

Kommunikationsnetze. Im Vergleich zu Kupfer- und Kabelnetzen verbrauchen Glasfasernetze deutlich weniger Energie und tragen so zur Verbesserung der ESG-Bilanz (Environmental, Social, Governance) bei. Die SFN AG setzt sich dafür ein, dass der Ausbau von FTTH-Netzen und die Stilllegung nicht mehr gebrauchter Kupfer- und Kabelnetze weiter vorangetrieben wird.

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https://www.swissfibrenet.ch/news/

Über die Swiss Fibre Net AG:
Die Swiss Fibre Net AG ist ein Gemeinschaftsunternehmen lokaler Energieversorger und Kabelnetzbetreiber in der Schweiz. Sie verbindet die lokalen Glasfasernetze ihrer Netzpartner zu einem grossflächigen, homogenen und offenen «Swiss Fibre Net» und bietet dieses diskriminierungsfrei national tätigen Telekomanbietern zur Nutzung an. Damit ist die Swiss Fibre Net AG Garantin für den Wettbewerb im Telekommunikationsmarkt.

Anhang: FTTH/B Market Panorama Update 2024

FTTH/B Market Panorama in Europe

September 2024

FTTH Council Europe's Market Intelligence Committee

FTTH COUNCIL EUROPE

With thanks to IDATE

AGENDA

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 2024

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

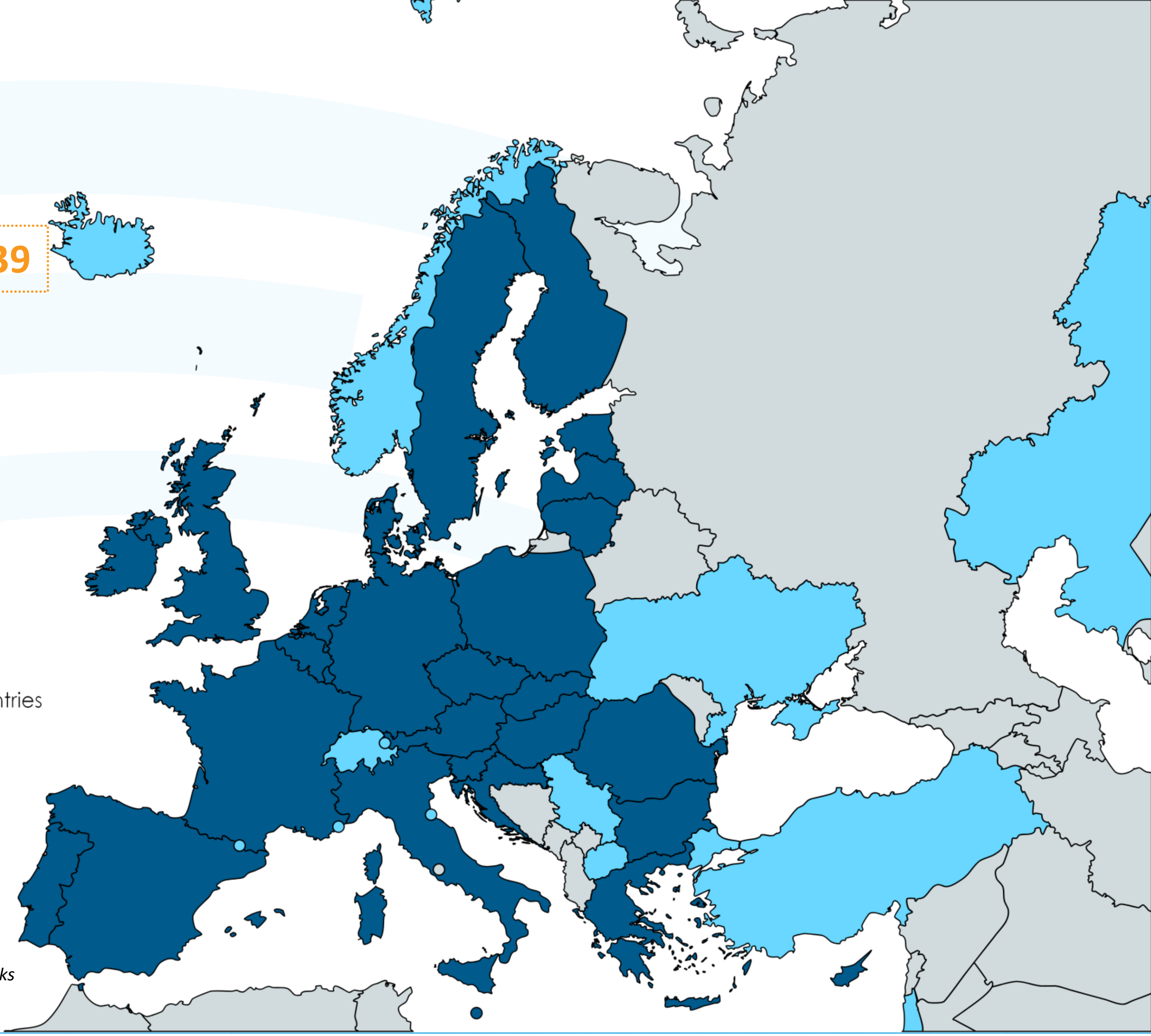
The study is focused on EU27+UK and EU39

▪ 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

▪ EU39 detailed composition:

EU27 + UK
CIS countries: Kazakhstan, Ukraine*, +2
Iceland, Israel, North Macedonia, Norway, Serbia, Switzerland, Turkey



Note :
- *****Ukraine: we have no current data on the level of damage caused by the War on FTTH networks*
- *Since February 2022, we are not reporting on market situation related to Russia and Belarus.*

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

2. General Overview & Main trends

FTTH COUNCIL EUROPE

FTTH/B Market Panorama

Key Figures as of September 2024 in EU39[(1)]

269 million FTTH/B Homes Passed

143 million FTTH/B Subscribers

SEPTEMBER 2024	EU 39	EU 27 + UK
Premises (Millions)	360	239
Homes passed (Millions)	269	165
Subscribers (Millions)	143	90
Coverage rate	74.61%	69.13%
Take-up rate	53.05%	54.54%
Penetration rate	39.58%	37.70%

FTTH/B deployment in Europe **is progressing rapidly**, but adoption remains a key challenge.

74.6% of households covered in EU39, yet only **39.6% subscribed to fiber**.

The priority now is to accelerate subscription uptake to maximize network impact.

Note: see slide 6 for the definition of the rates

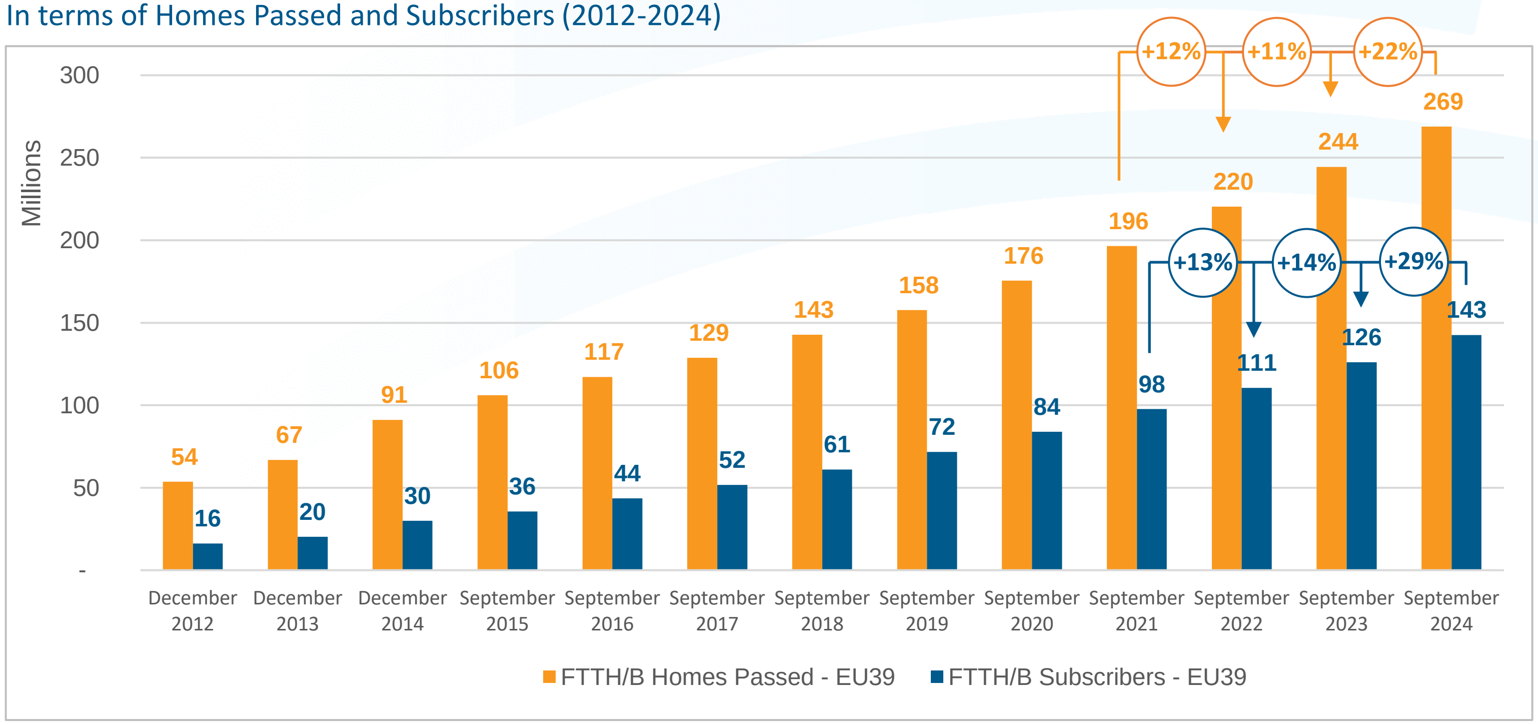
(1) EU39 = EU27+UK + 4 CIS countries + Iceland, Israel, North Macedonia, Norway, Serbia, Switzerland, Turkey

FTTH/B Market Panorama

Key trends as of September 2024

FTTH/B European market evolution in EU39 (1):

In terms of Homes Passed and Subscribers (2012-2024)



"The full-fibre transition is within reach, but efforts must now focus on increasing adoption and covering underserved areas".

SEPTEMBER 2024	EU 39	EU 27 + UK
Coverage rate	74.61%	69.13%
Coverage rate delta vs 2023	+ 5.46 p.p	+6.93 p.p
Take-up rate	53.05%	54.54%
Take-up rate delta vs 2023	+1.46 p.p	+1.34 p.p
Penetration rate	39.58%	37.70%
Penetration rate delta vs 2023	+3.90 p.p.	+4.61 p.p.

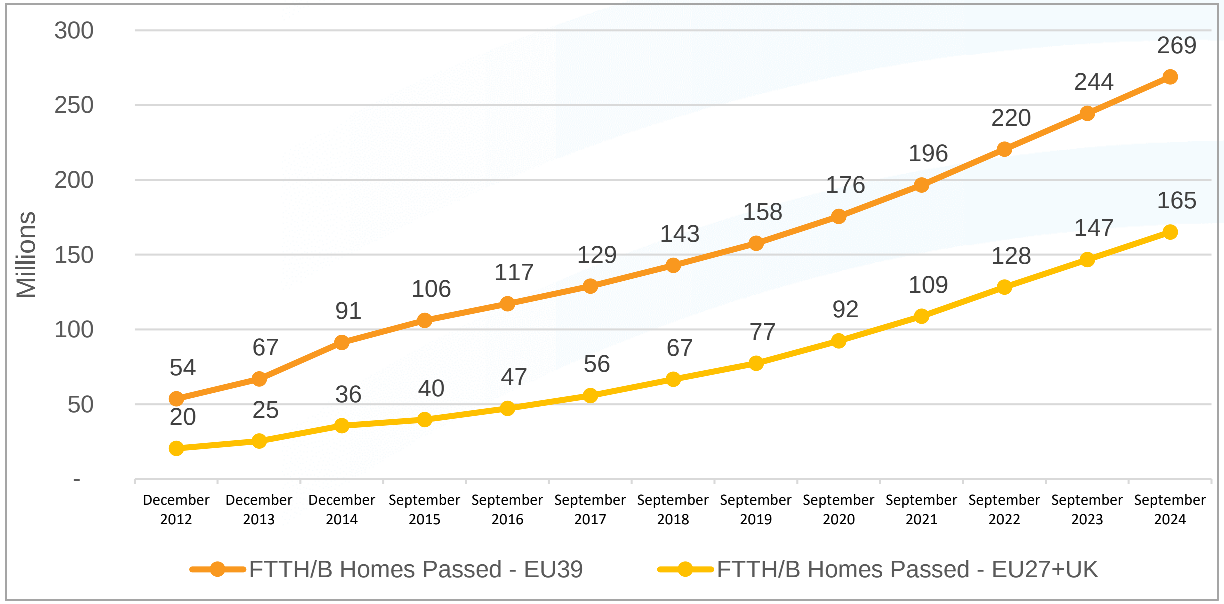
Note: see slide 6 for the definition of the rates

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

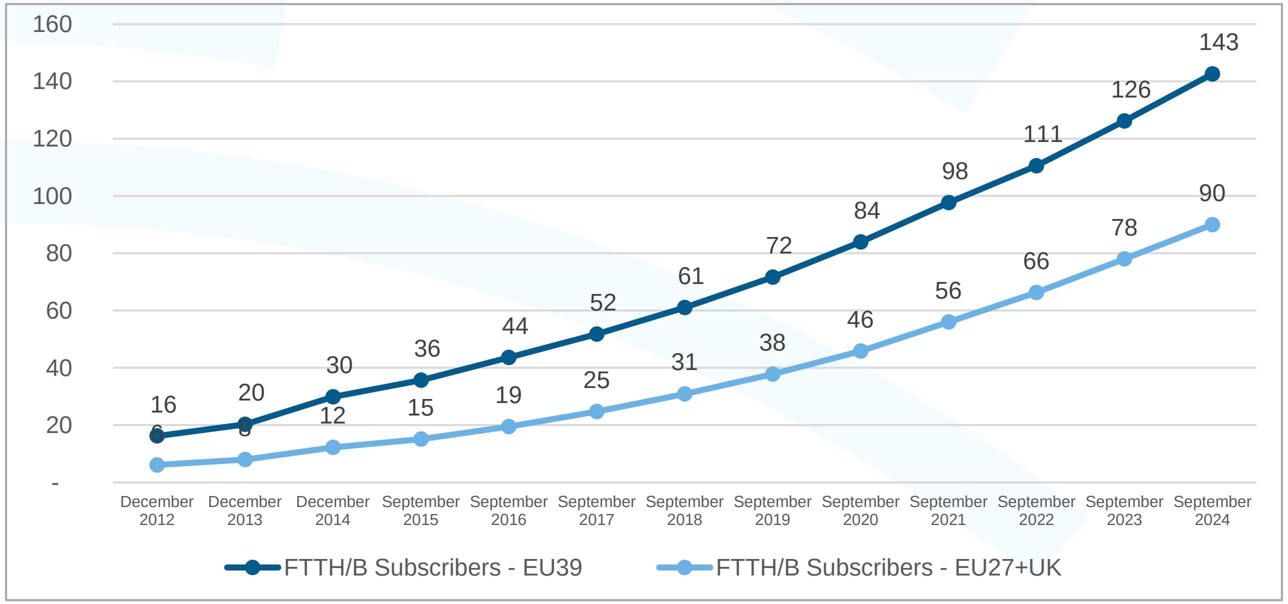
FTTH/B Market Panorama

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



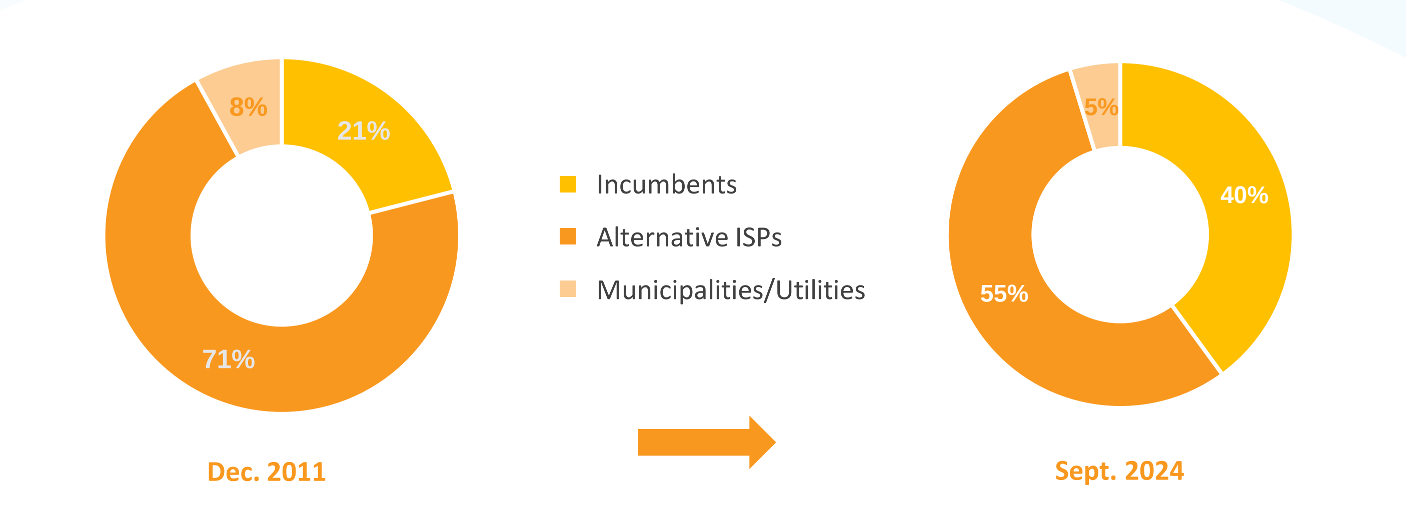
	SEPT 2024	DEC 2013
Proportion of the total Homes Passed represented by EU 27 + UK	61.40% (+1.41 p.p 2023)	37.73%
Proportion of the total Subscribers represented by EU 27 + UK	63.12% (+1.26 p.p 2023)	39.17%

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 2024):
  - 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.

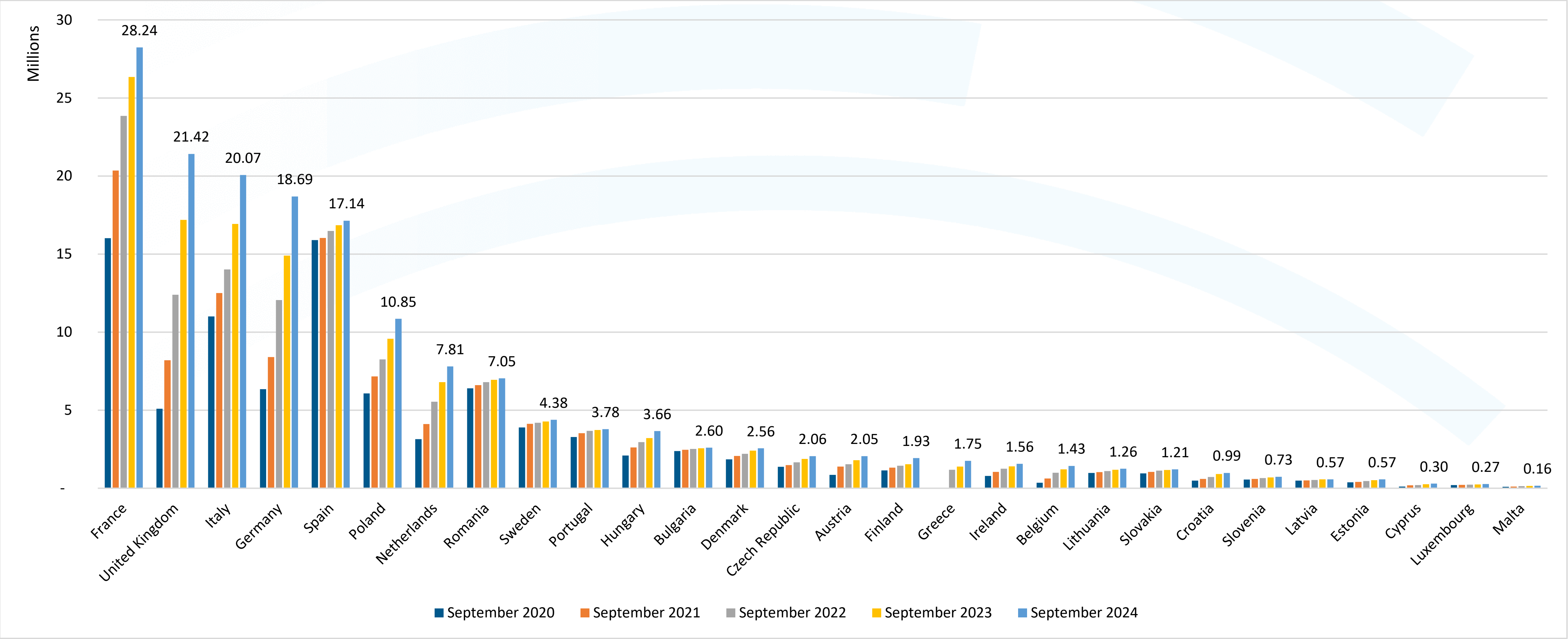
Breakdown of FTTH/B Homes Passed by type of player (%)
Data comparison between Dec. 2011 and Sept. 2024



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

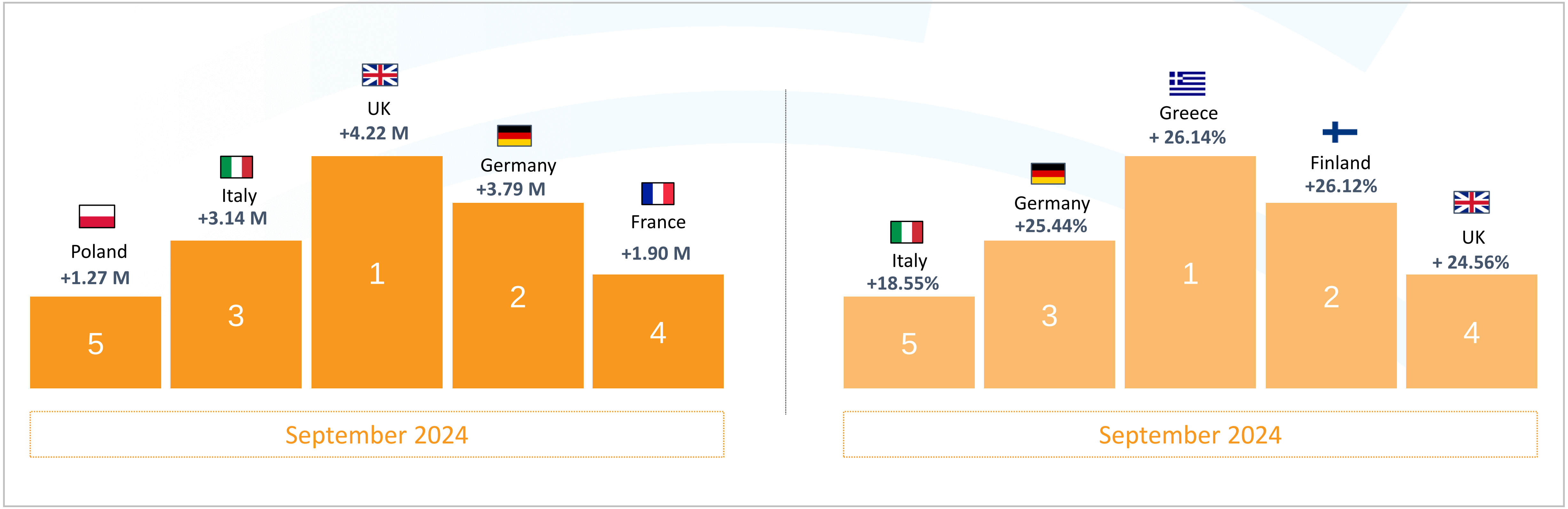
FTTH/B Homes Passed – EU27 + UK Ranking

EU27+UK ranking in terms of FTTH/B Homes passed over time (in million homes)
Data comparison between Sept. 2020 and Sept. 2024



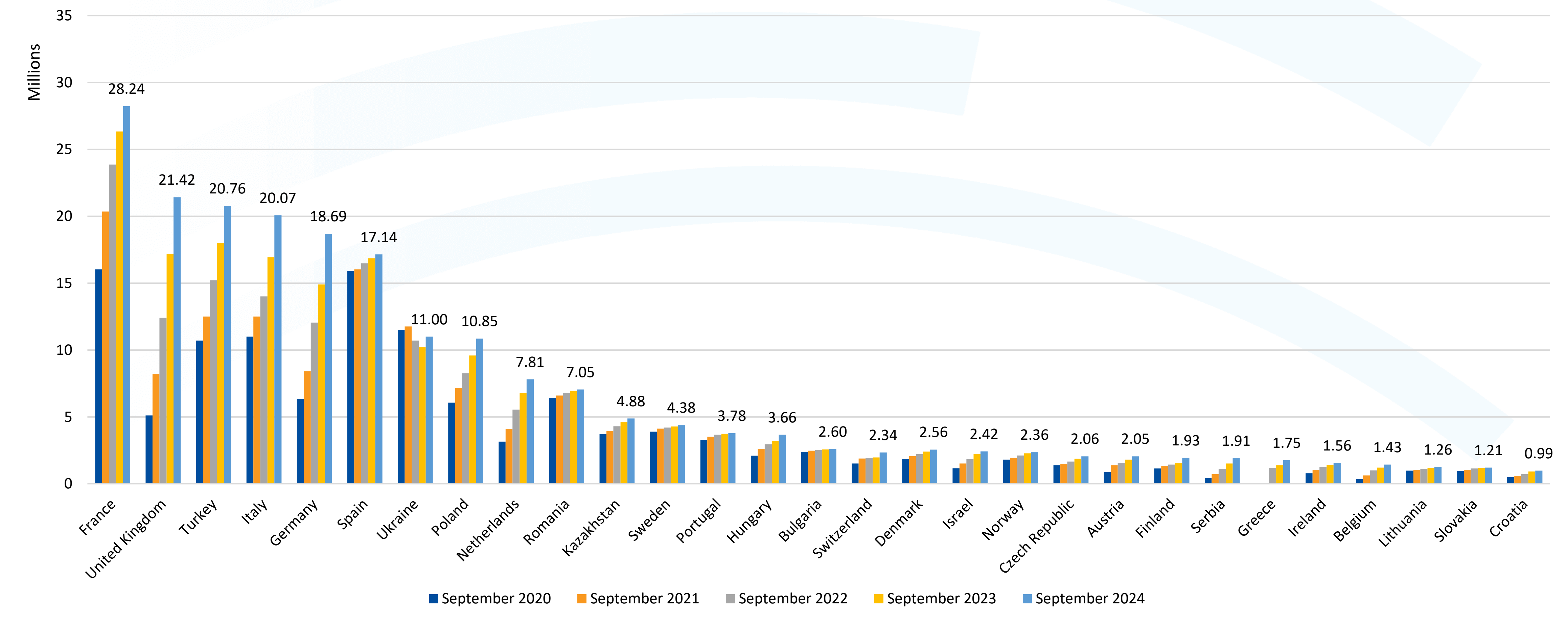
FTTH/B Homes Passed – EU27 + UK Ranking

5 fastest growing markets (in both volume and %)
Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Homes Passed)



FTTH/B Homes Passed – EU39 Ranking

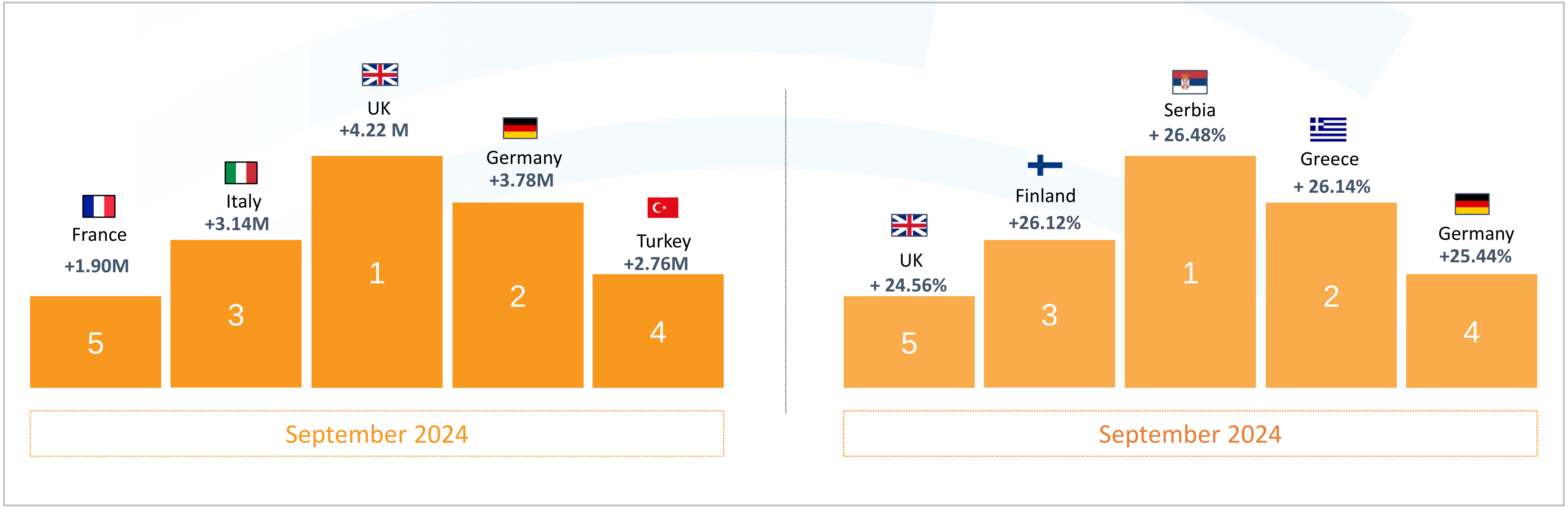
European ranking in terms of FTTH/B Homes passed, countries with > 1 million homes passed
Data comparison between Sept. 2020 and Sept. 2024 (in million homes)



FTTH/B Homes Passed – EU39 Ranking

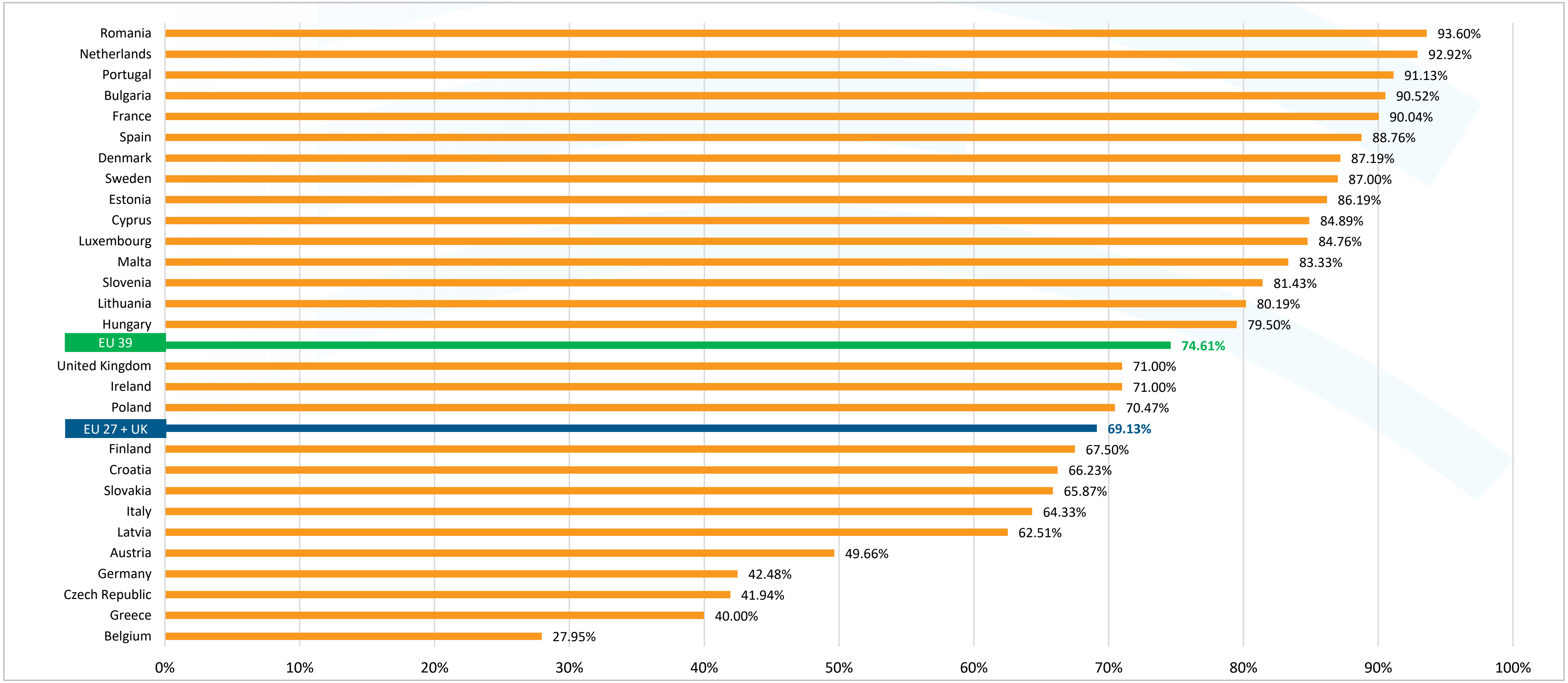
5 fastest growing markets (in both volume and %)

Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Homes Passed)



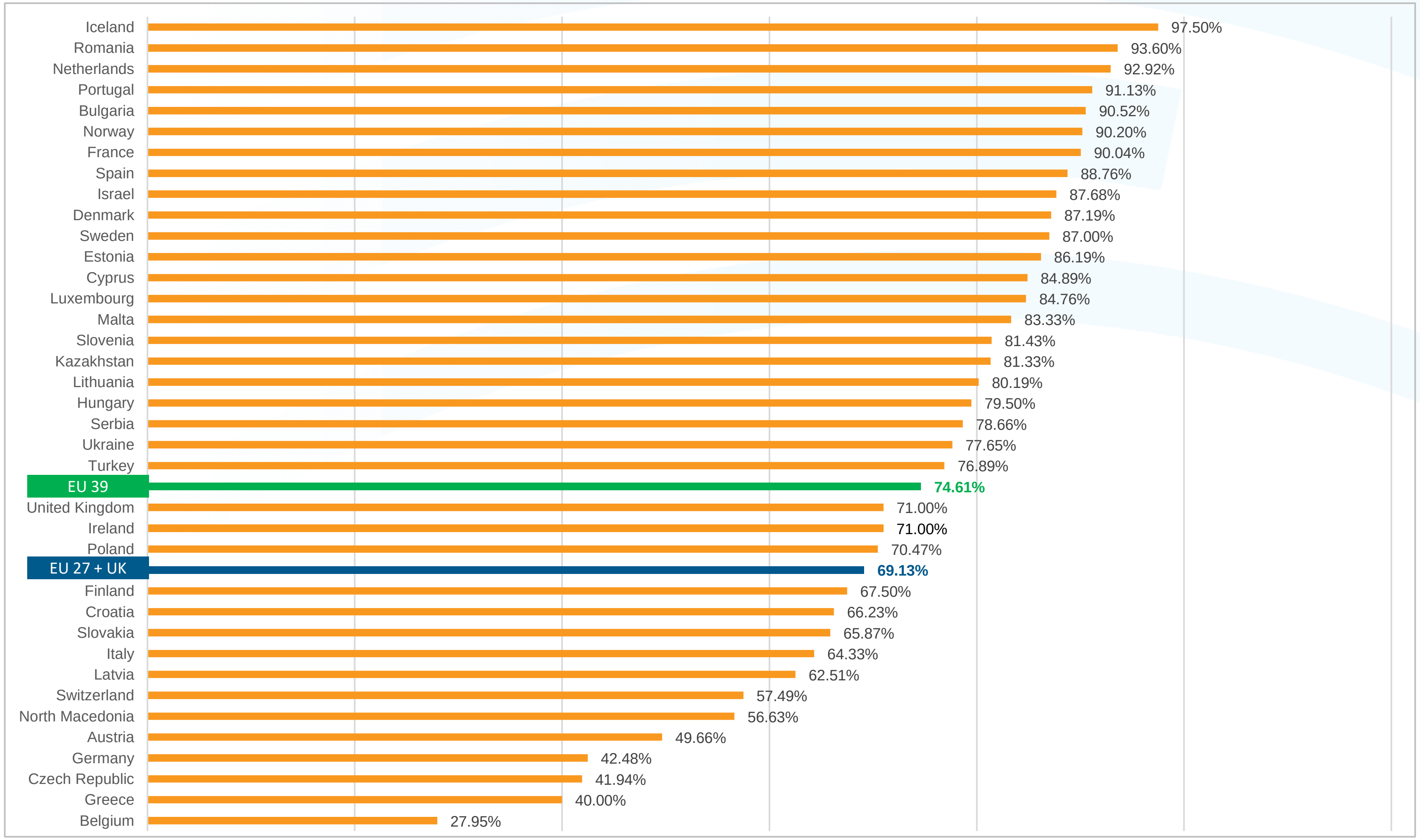
Coverage rate, European leaderboards – EU27+UK

FTTH/B coverage rate (households passed / households) in EU27+UK as of September 2024



Coverage rate, European leaderboards – EU39

FTTH/B coverage rate (households passed / households) as of September 2024

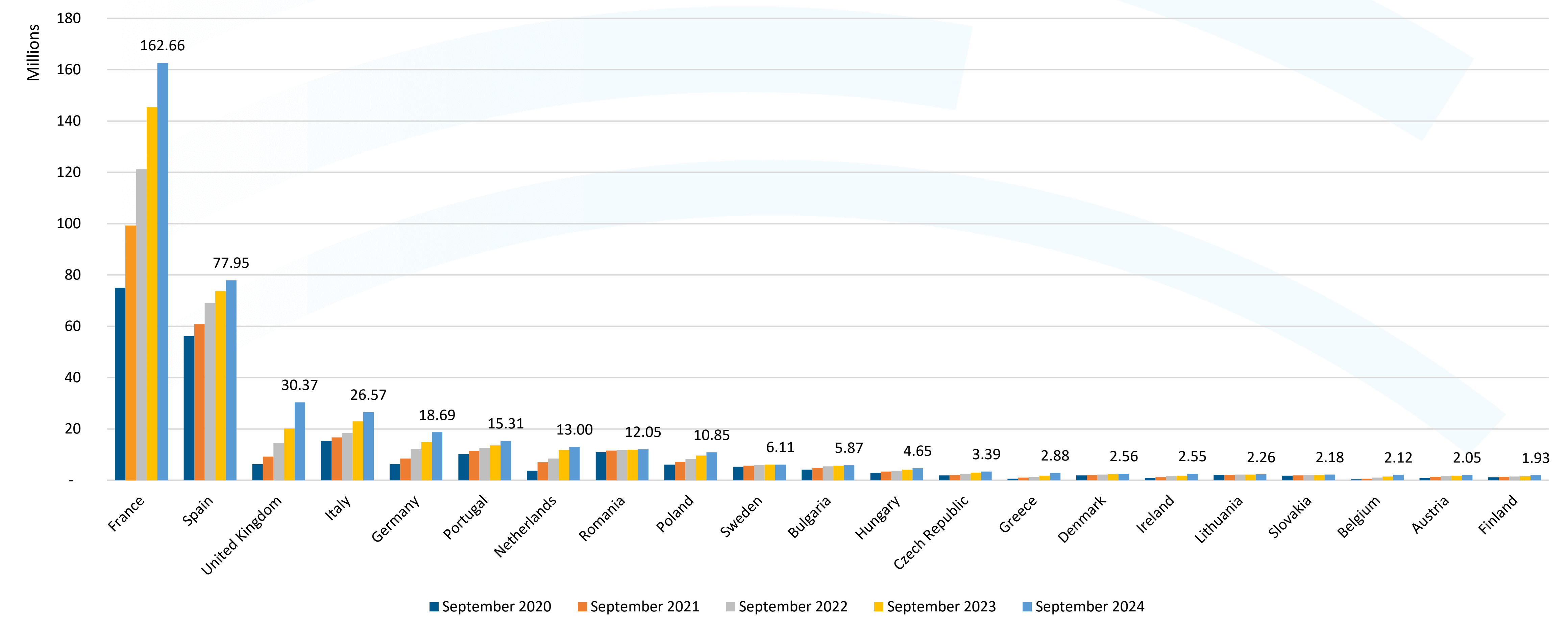


- Nearly **4 out of 5 homes** are covered by Full-fibre
- **Slowdown in mature markets (>85%).** Rural and low-density regions remain difficult to connect via FTTH/B

FTTH/B Sockets Deployed - EU27+UK Ranking

EU27+UK ranking in terms of FTTH/B Sockets Deployed, countries with > 1 million sockets deployed

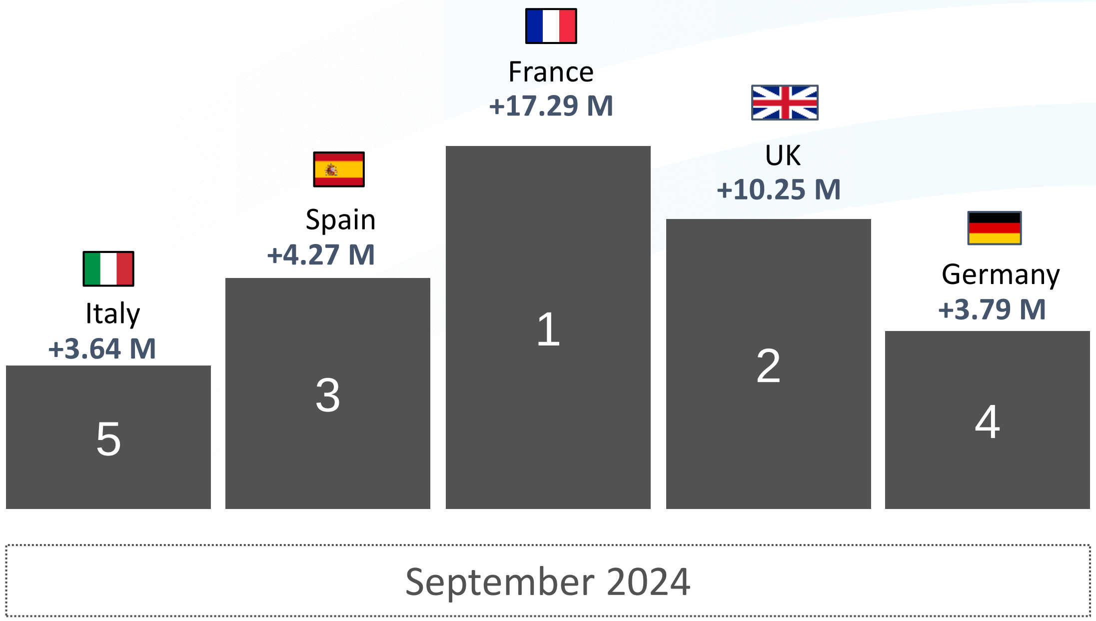
Data comparison between Sept. 2020 and Sept. 2024 (in million homes)

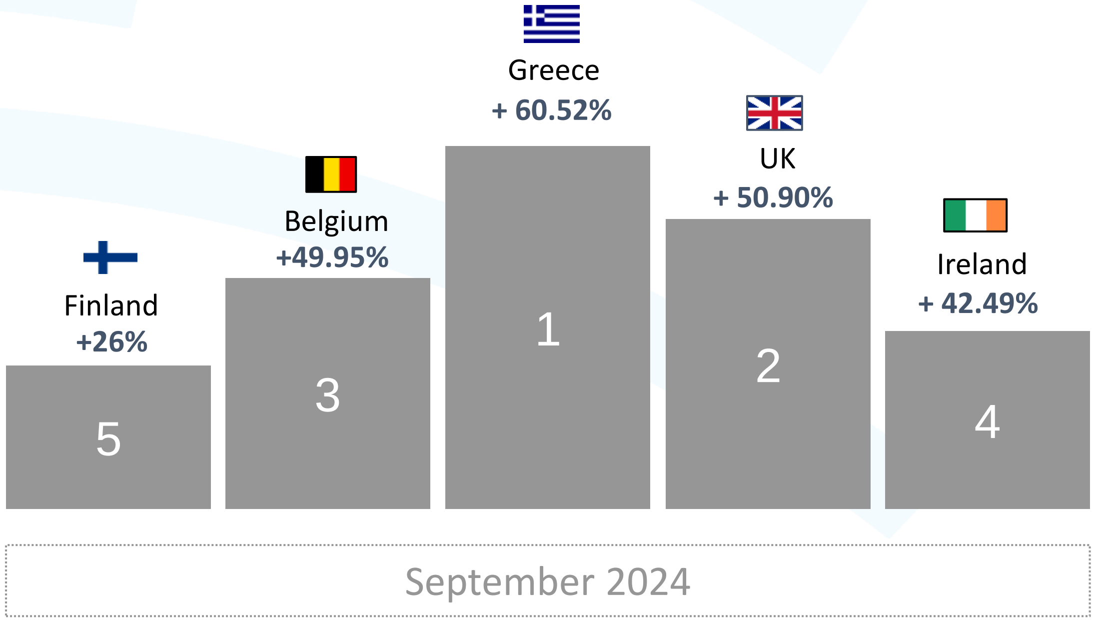


FTTH/B Sockets Deployed - EU27+UK Ranking

5 fastest growing markets (in both volume and %)

Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Sockets Deployed)

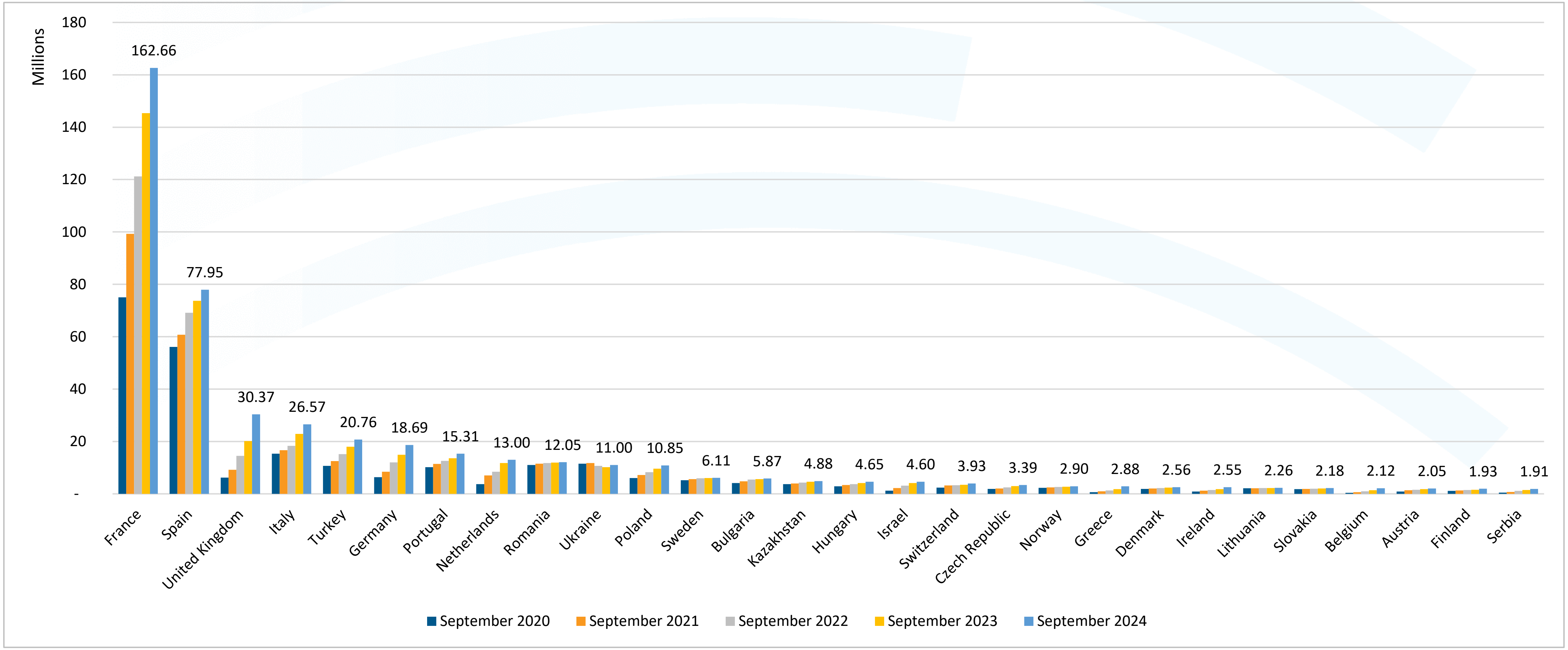




FTTH/B Sockets Deployed - EU39

EU39 ranking in terms of FTTH/B Sockets Deployed, countries with > 1 million sockets deployed

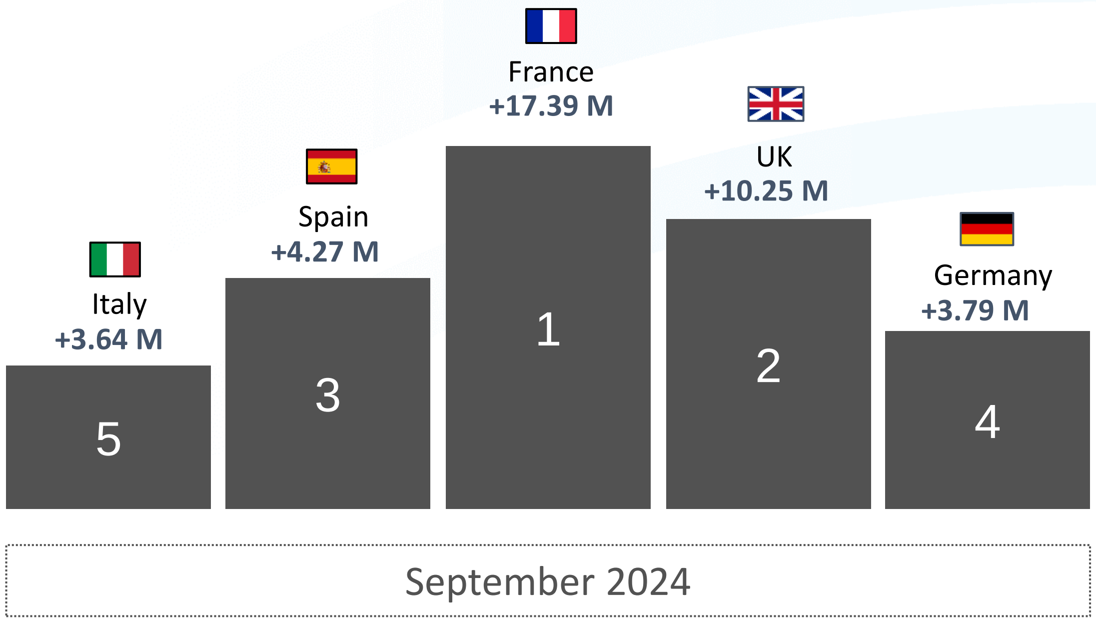
Data comparison between Sept. 2020 and Sept. 2024 (in million homes)

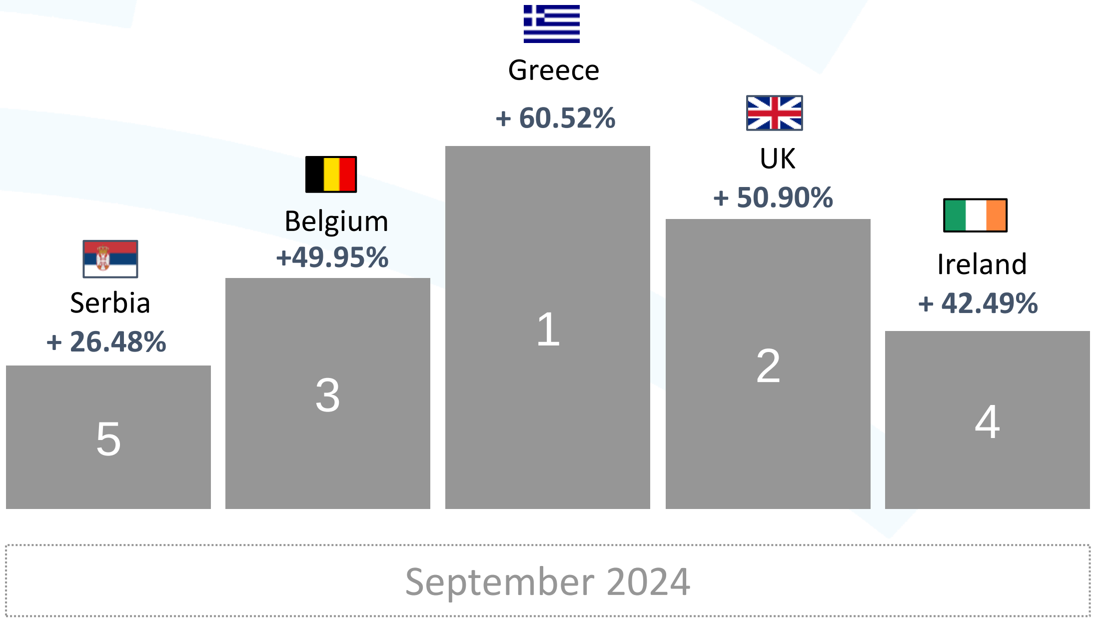


FTTH/B Sockets Deployed - EU39

5 fastest growing markets (in both volume and %)

Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Sockets Deployed)



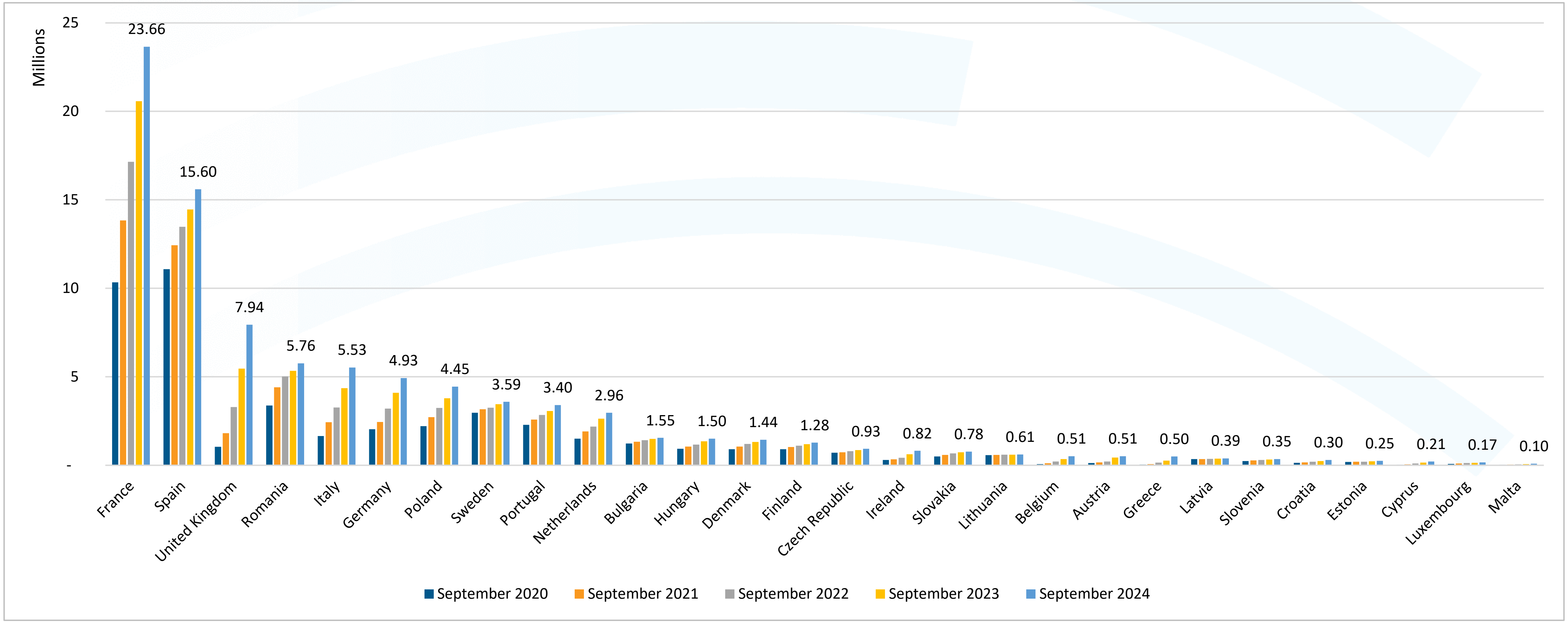


4. FTTH/B Subscribers and Take-up rate

FTTH/B Subscribers – EU27 + UK

EU27+UK ranking in terms of FTTH/B Subscriptions over time (in thousands homes)

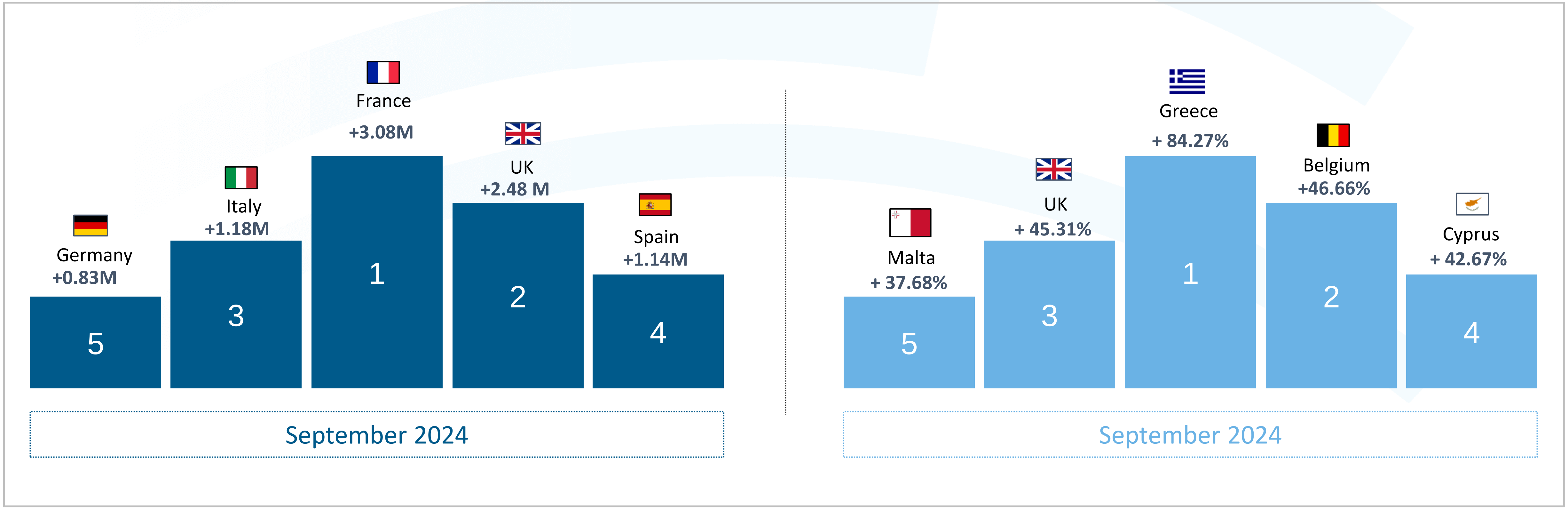
Data comparison between Sept. 2020 and Sept. 2024 (in million homes)



FTTH/B Subscribers – EU27 + UK

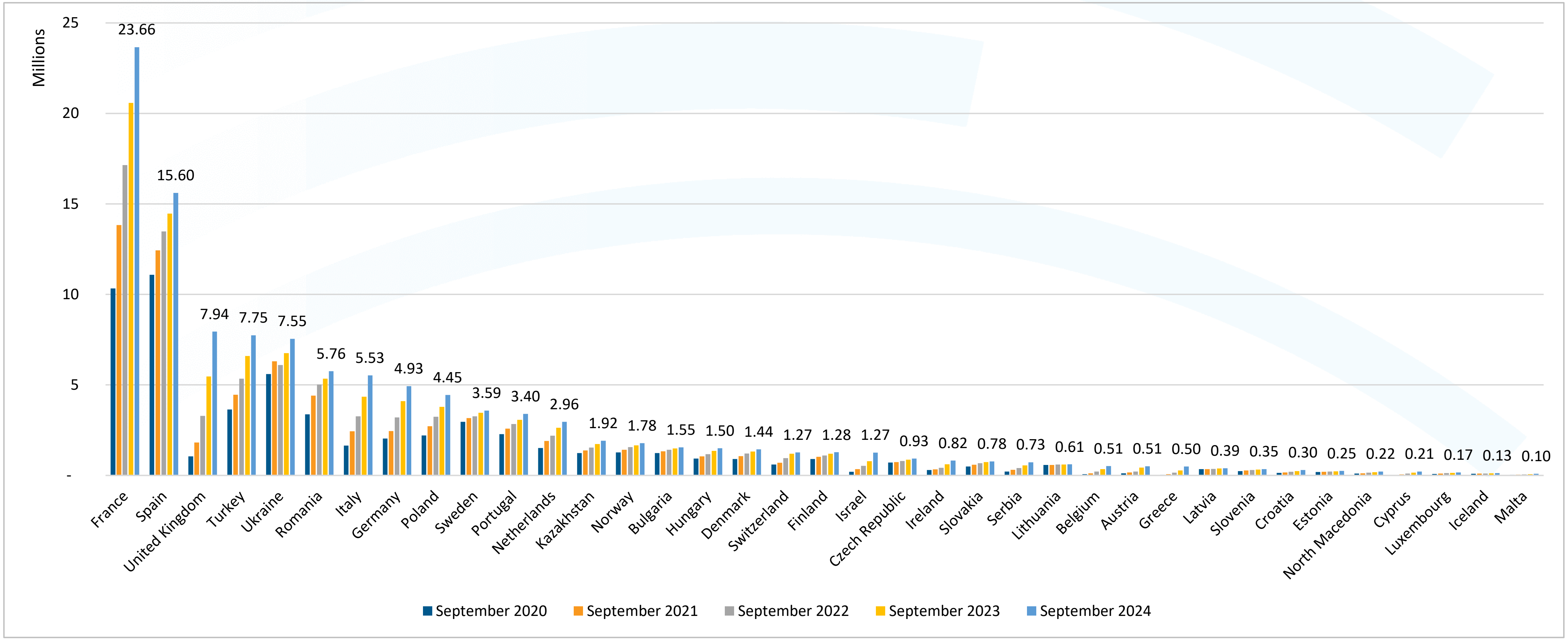
5 fastest growing markets (in both volume and %)

Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Subscribers)



FTTH/B Subscribers – EU39

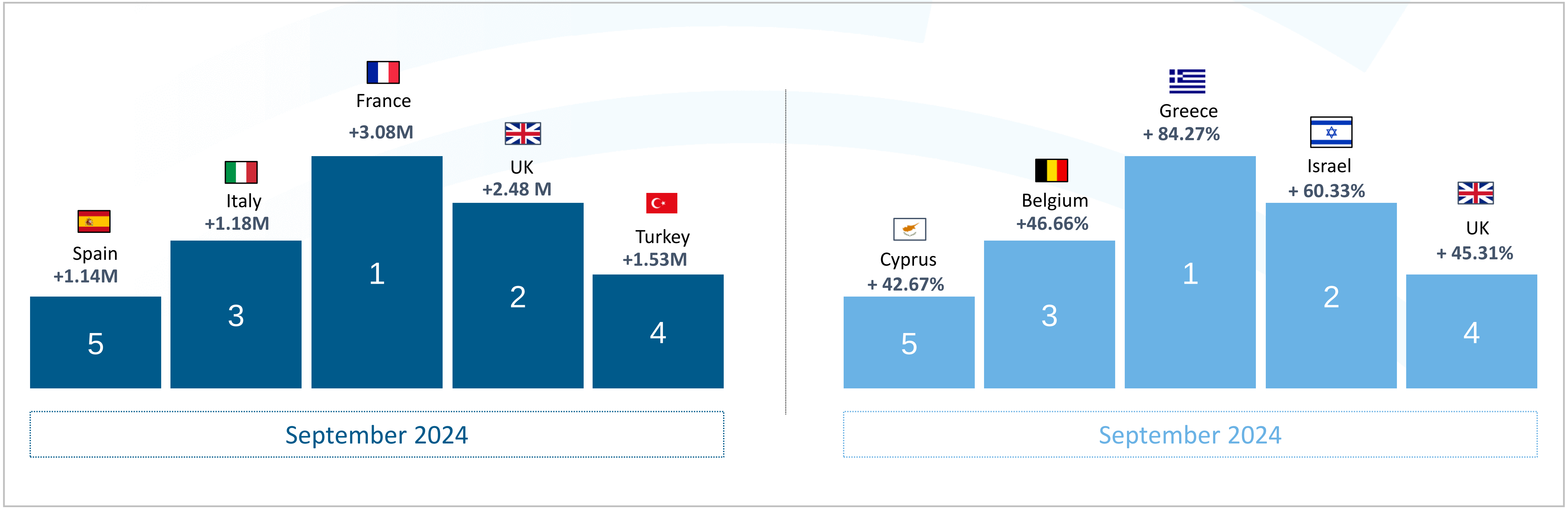
EU39 ranking in terms of FTTH/B Subscriptions over time (in thousands homes)
Data comparison between Sept. 2020 and Sept. 2024 (in million homes)



FTTH/B Subscribers – EU39

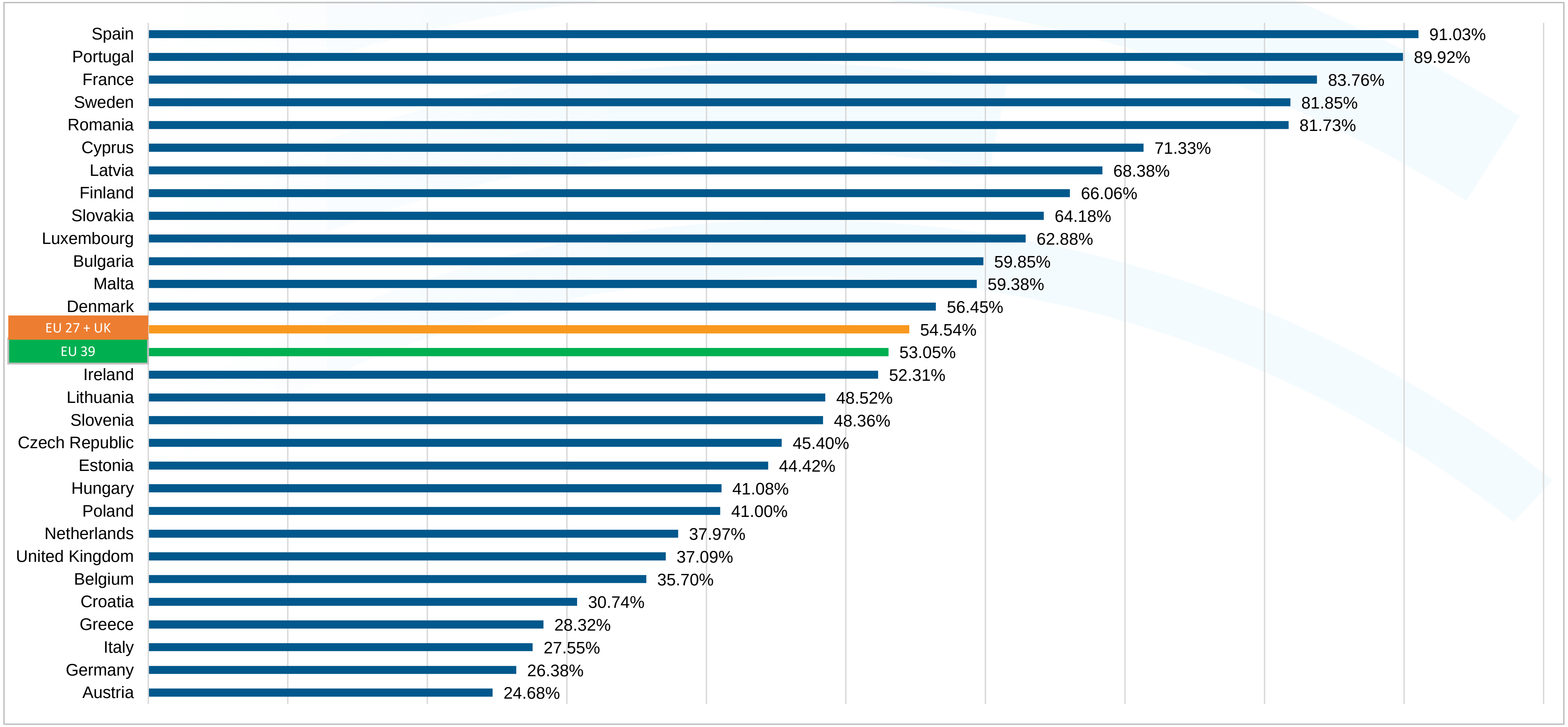
5 fastest growing markets (in both volume and %)

Data from Sept. 2023 to Sept. 2024 (in terms of FTTH/B Subscribers)



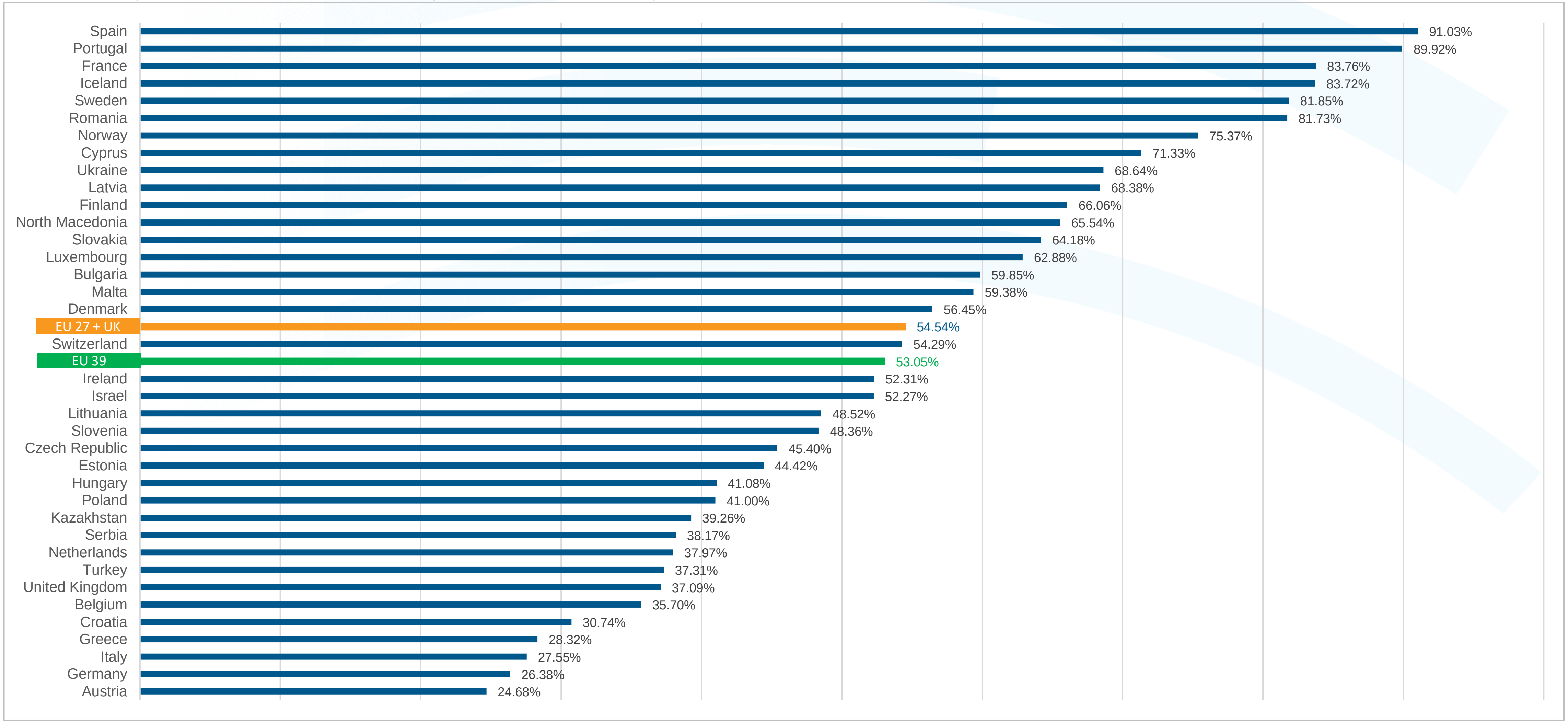
Take-up rate, European leaderboards – EU27+UK

FTTH/B take-up rate (subscribers / households passed) in EU27+UK as of September 2024



Take-up rate, European leaderboards – EU39

FTTH/B take-up rate (subscribers / households passed) in EU39 as of September 2024

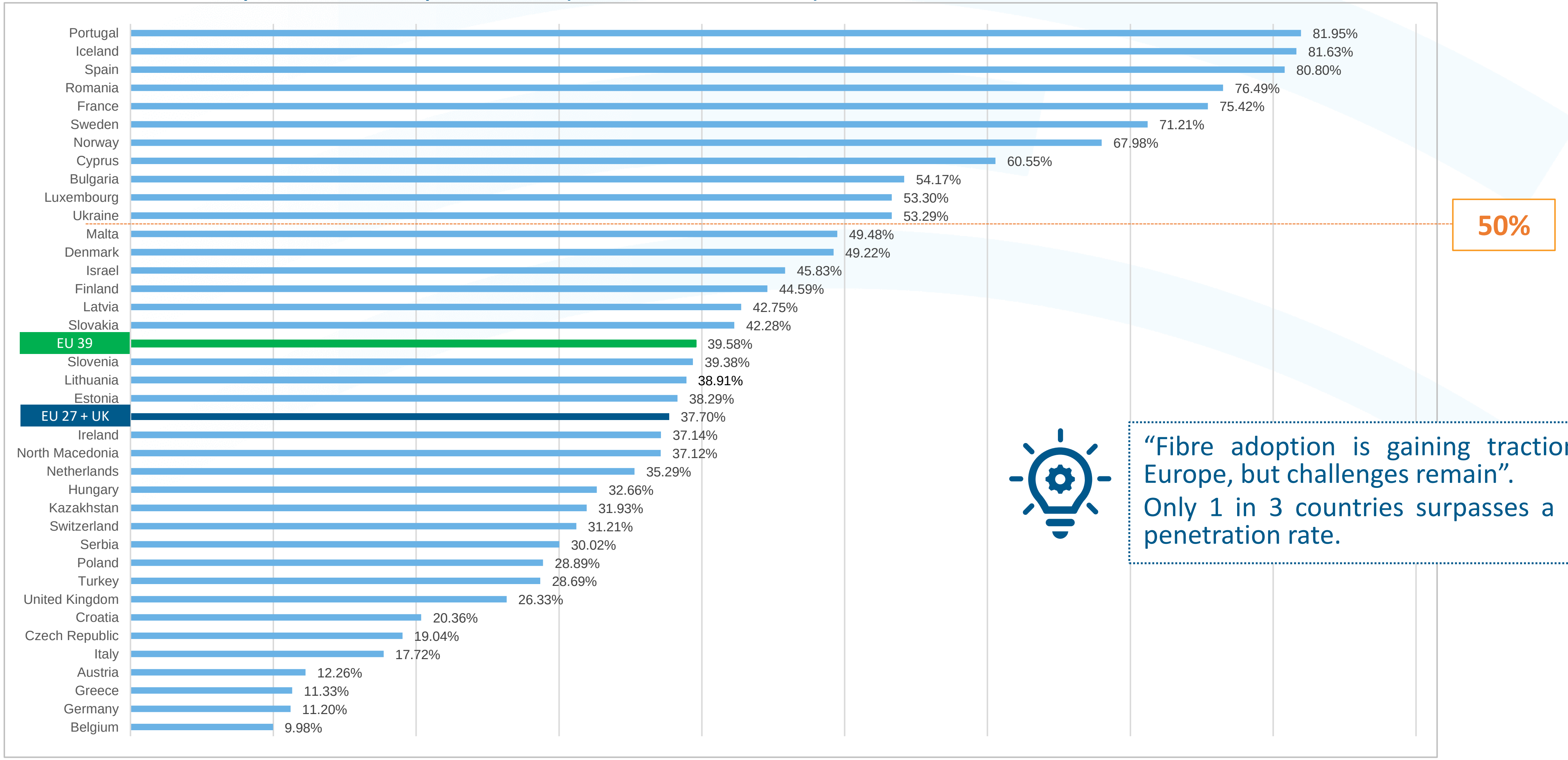


5. FTTH/B Penetration rate

With thanks to IDATE

Penetration rate, European leaderboards – EU39

Penetration rates of European countries - September 2024 (Subscribers / Households)



"Fibre adoption is gaining traction in Europe, but challenges remain".
Only 1 in 3 countries surpasses a 50% penetration rate.

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

FTTH COUNCIL EUROPE

FTTH/B
Coverage rate
Summary map

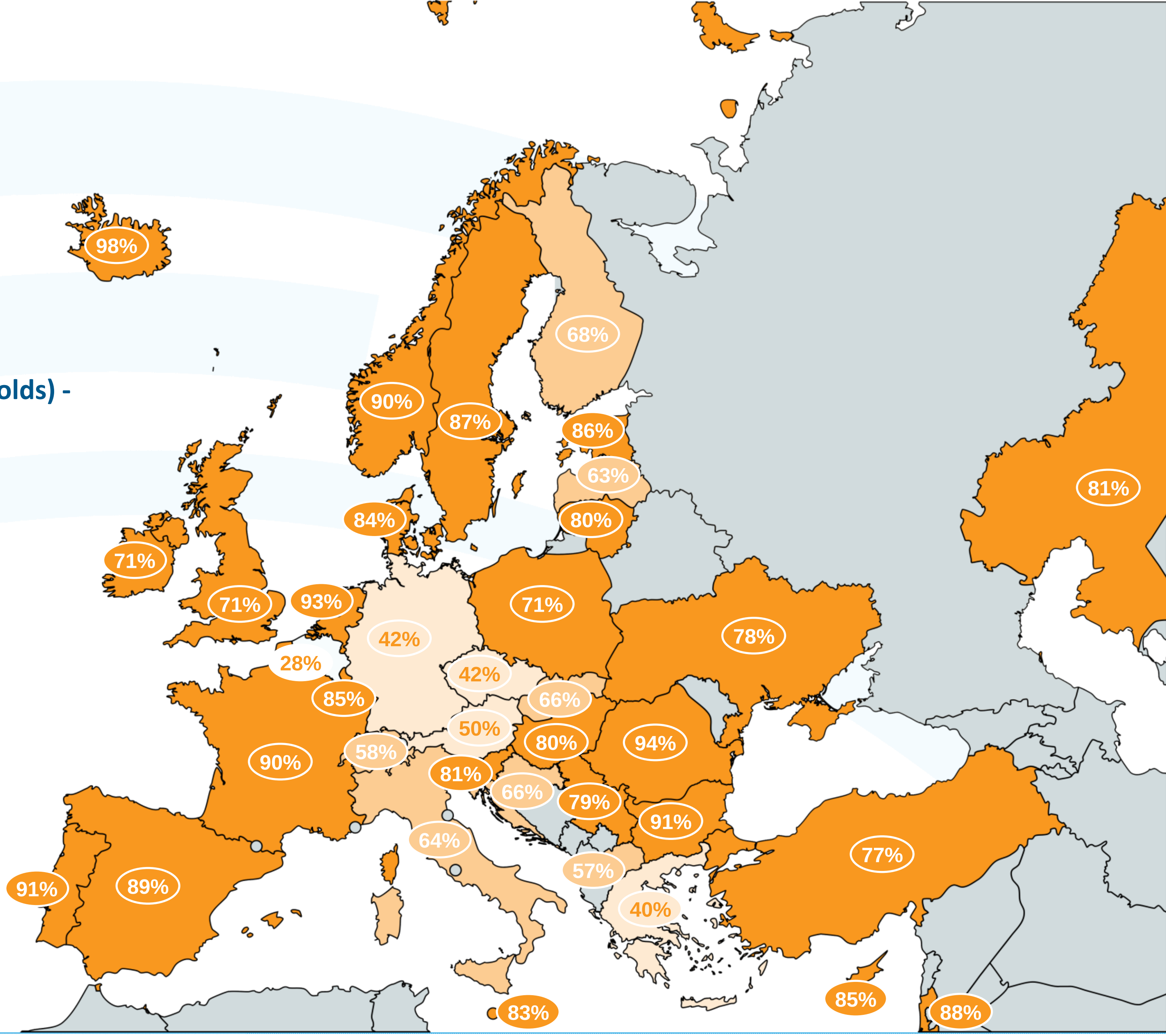
FTTH/B coverage rate map (households passed / households) - September 2024

COVERAGE RATE*

EU27+UK: **69.13% (+ 6.93 p.p yoy)**

EU39 : **74.61% (+ 5.46 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.

FTTH/B
Take-up Rate
Summary map

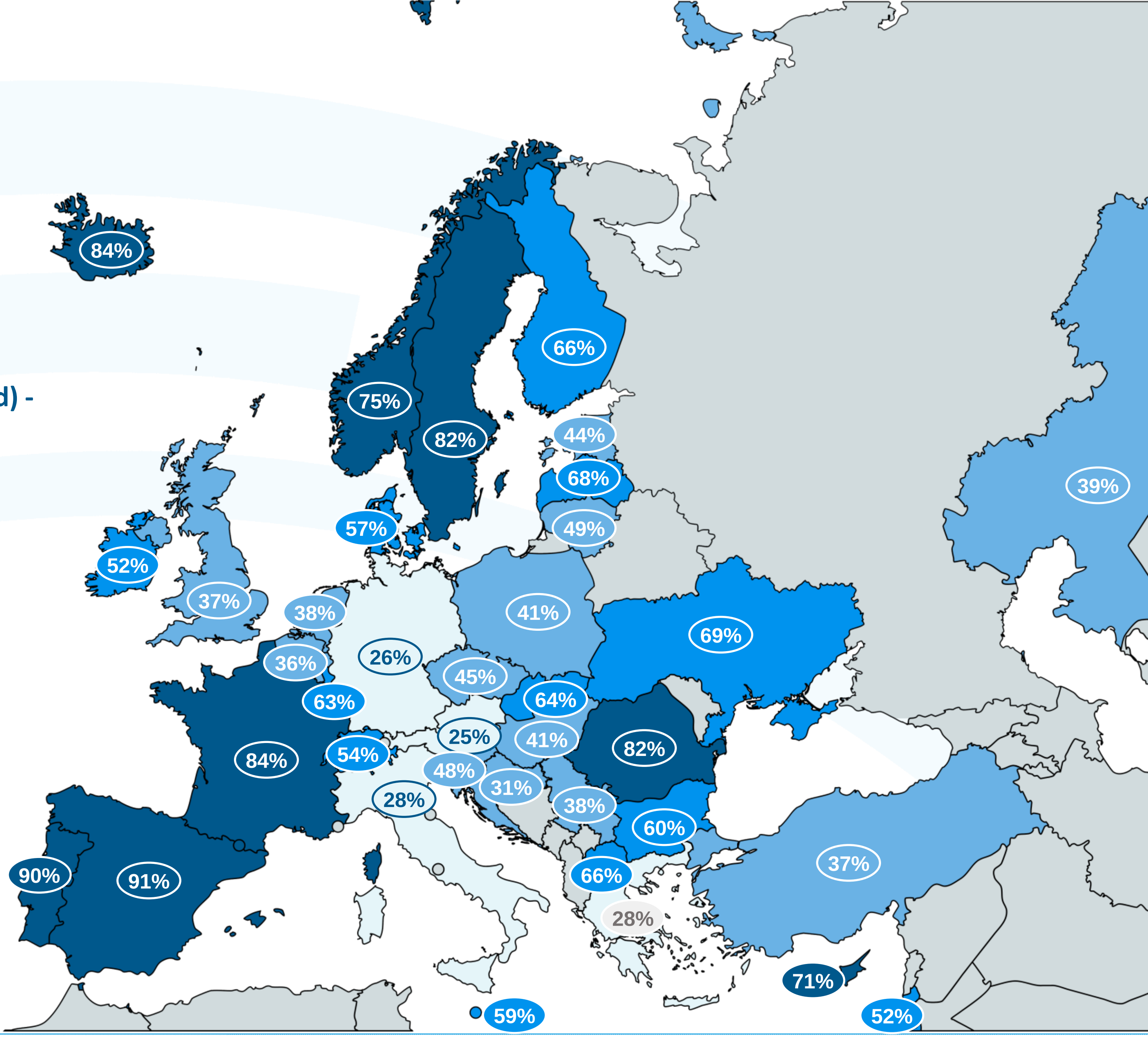
FTTH/B take-up rate map (subscribers / households passed) - September 2024

TAKE-UP RATE*

EU27+UK: **54.54% (+ 1.34 p.p yoy)**

EU39 : **53.05% (+ 1.46 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.

FTTH/B Penetration Rate

Summary map

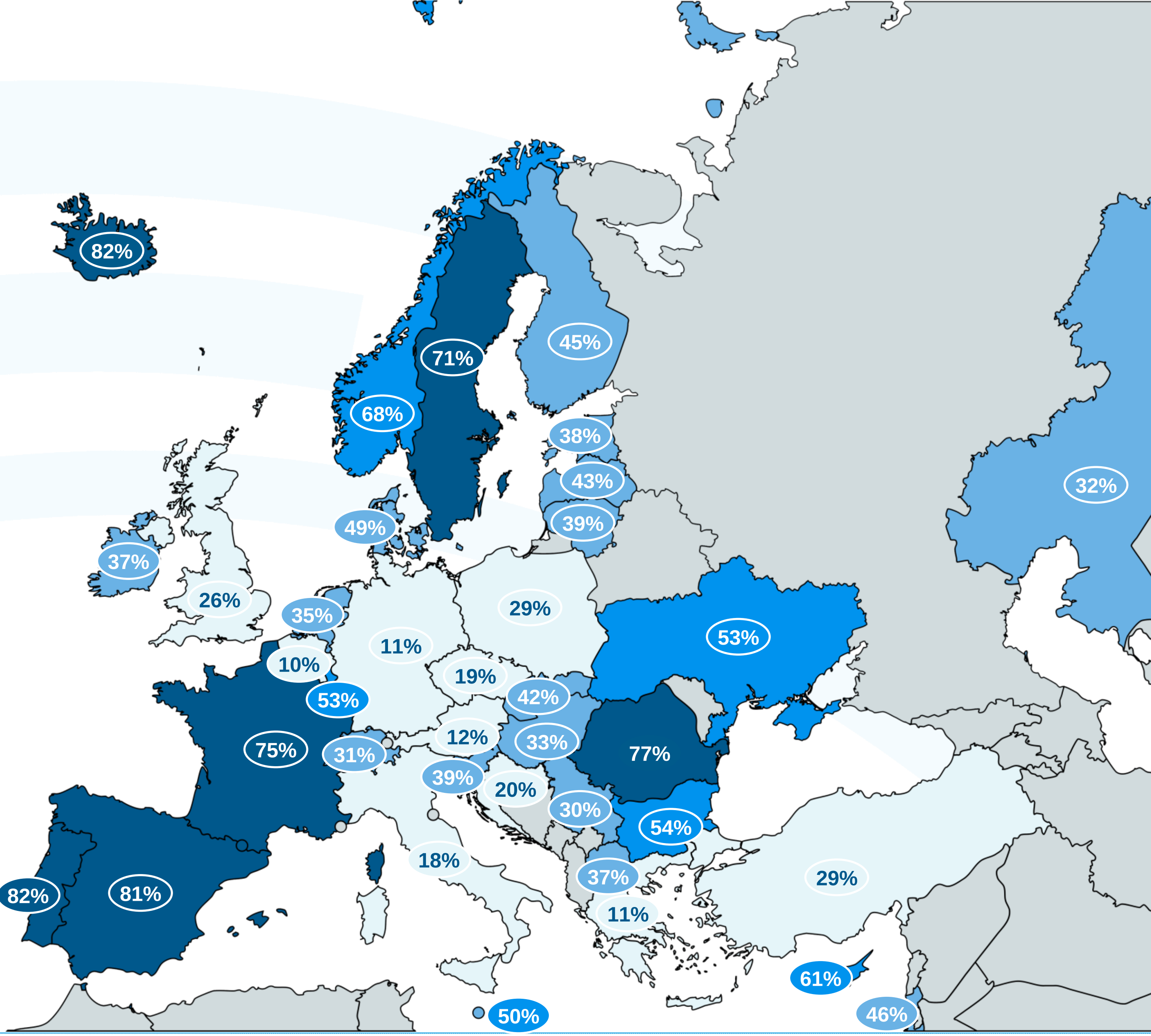
FTTH/B penetration rate map (subscribers / households) - September 2024

PENETRATION RATE*

EU27+UK: **37.70% (+ 4.61 p.p yoy)**

EU39 : **39.58% (+ 3.90 p.p yoy)**

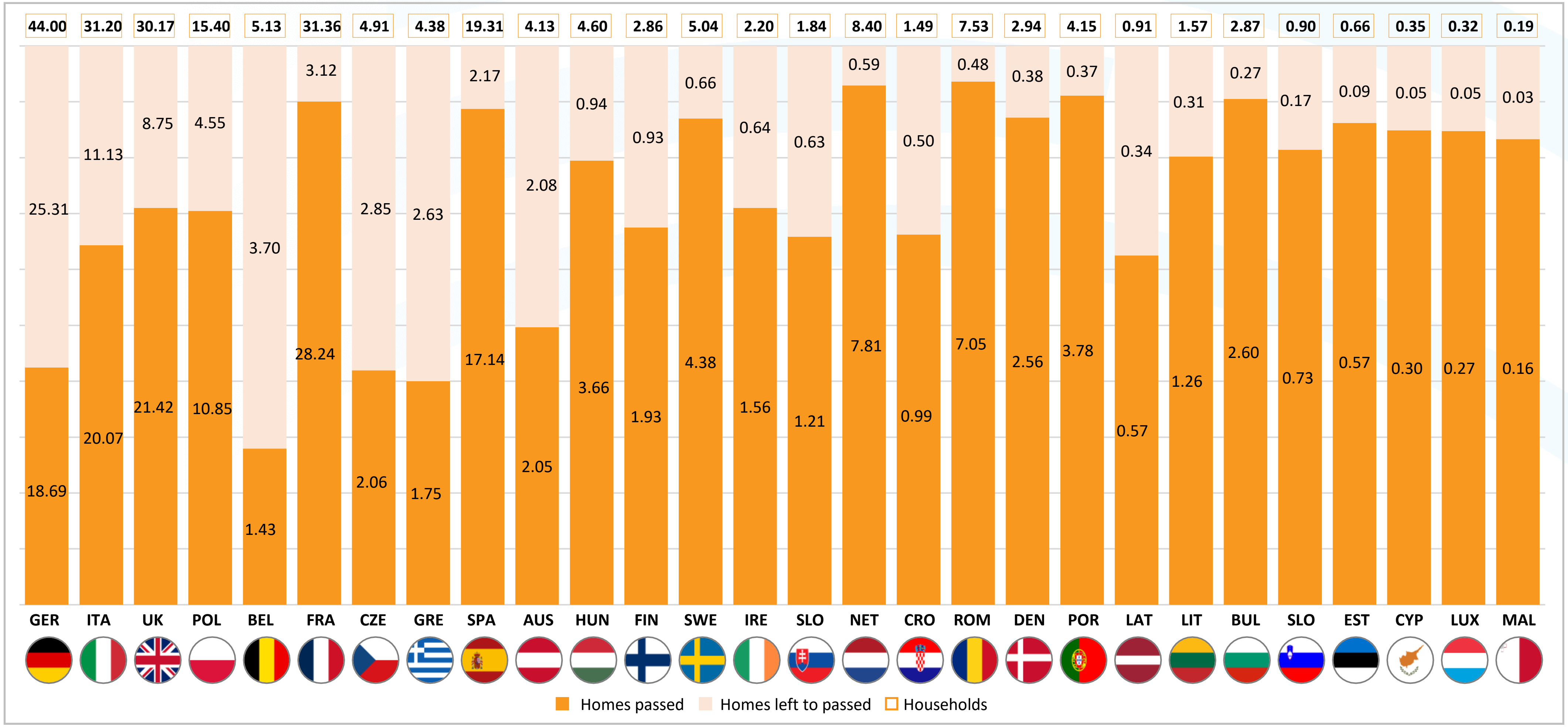
- FTTH/B Coverage < 30%
- FTTH/B Coverage 30% > 50%
- FTTH/B Coverage 50% > 70%
- FTTH/B Coverage > 70%



(*) : 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?

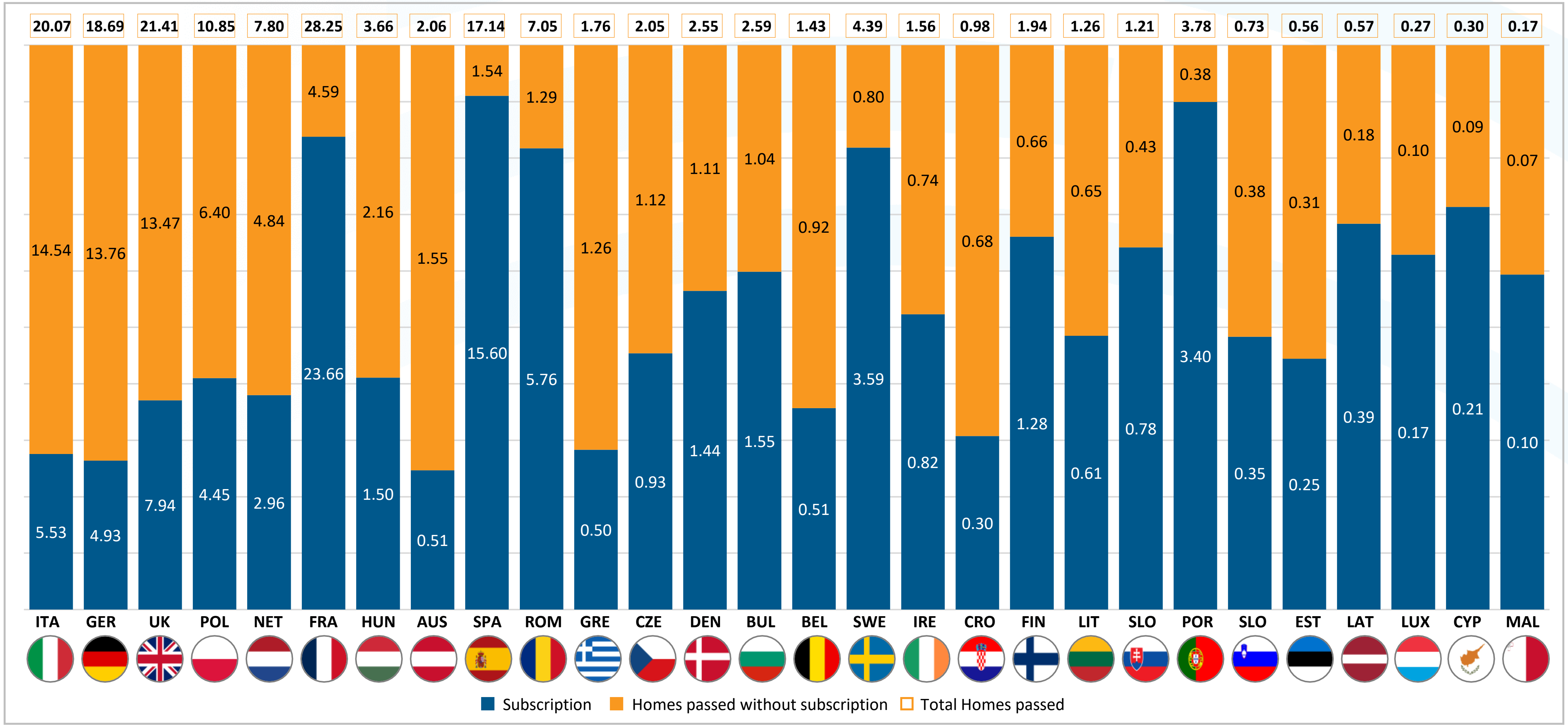
EU27+UK Ranking : Households left to pass, September 2024



- **Nearly 20 million homes passed this year !**
- EU27+UK : **74 million homes left to pass**
- **Germany, UK, Italy, and Poland** are the countries with the most work to be done **(50 million homes left to pass)**

Bridging the fibre gap: From coverage to adoption

Subscribers vs Homes passed, EU27+UK – September 2024



- EU 27+UK : there are are **75 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

ANDORRA

48,000 Households

48,000 Homes Passed by Fibre — 100%*

43,460 Fibre Subscribers — 91%*

* of total homes

LIECHTENSTEIN

18,500 Households

18,200 Homes Passed by Fibre — 98%*

15,700 Fibre Subscribers — 85%*

* of total homes

MONACO

21,100 Households

21,100 Homes Passed by Fibre — 100%*

17,500 Fibre Subscribers — 83%*

* of total homes

San Marino

15,500 Households

14,700 Homes Passed by Fibre — 95%*

11,400 Fibre Subscribers — 74%*

* of total homes

7. FTTH/B Key conclusions

Key conclusions

FTTH/B coverage

- **EU39:** steady progress with 269 million homes passed (+24 million YoY). In the previous year the YoY increase was 24 million. 34 out of EU39 countries have now passed the 50%
- **EU 27+UK:** Nearly 3 out of 4 homes are covered by Full-fibre with 165 million of home passed (+18 million YoY). In the previous year the YoY increase was also 18 million. 24 out of 28 countries have now passed the 50%FTTH/B coverage

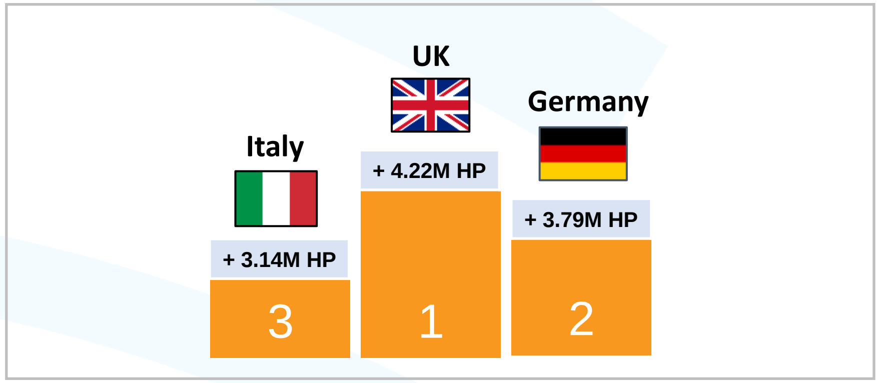
Subscription and take-up

- **EU39:** We've had a record number of new subscriptions over the last year (+17million) with a total of 143 million of subs with a take-up rate >50%

- **EU27+UK:** 90 million of subs (+12 million YoY) that confirms the increase subs of previous year with a take-up rate that reach the 55%. In UK and Italy consistent increase of subs vs previous year

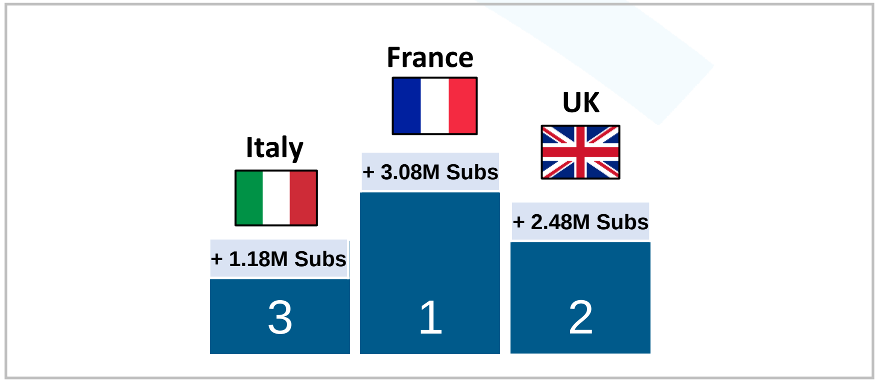
Top 3 - Main movers in terms of Homes Passed in absolute numbers

EU 39



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

EU39



Thank you for your attention!

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Annex: country data (1/2)

	HOUSEHOLDS	FTTH/B Homes Passed	FTTH/B Subscribers	Coverage rate	Take-up rate	Penetration rate
Austria	4 136 000	2 054 000	507 000	49,7%	24,7%	12,3%
Belgium	5 130 949	1 434 250	512 000	28,0%	35,7%	10,0%
Bulgaria	2 866 657	2 595 000	1 553 000	90,5%	59,8%	54,2%
Croatia	1 488 803	986 000	303 100	66,2%	30,7%	20,4%
Cyprus	353 400	300 000	214 000	84,9%	71,3%	60,6%
Czech Republic	4 900 000	2 055 000	933 000	41,9%	45,4%	19,0%
Denmark	2 931 370	2 555 774	1 442 800	87,2%	56,5%	49,2%
Estonia	655 500	565 000	251 000	86,2%	44,4%	38,3%
Finland	2 866 200	1 934 700	1 278 000	67,5%	66,1%	44,6%
France	31 363 960	28 240 000	23 655 000	90,0%	83,8%	75,4%
Germany*	44 000 000	18 690 000	4 930 000	42,5%	26,4%	11,2%
Greece	4 385 126	1 754 000	496 800	40,0%	28,3%	11,3%
Hungary*	4 604 000	3 660 000	1 503 437	79,5%	41,1%	32,7%
Iceland	160 000	156 000	130 600	97,5%	83,7%	81,6%
Ireland	2 200 000	1 562 000	817 035	71,0%	52,3%	37,1%
Israel	2 760 000	2 420 000	1 265 000	87,7%	52,3%	45,8%
Italy*	31 200 000	20 070 000	5 530 000	64,3%	27,6%	17,7%
Kazakhstan*	6 000 000	4 880 000	1 916 000	81,3%	39,3%	31,9%
Latvia*	915 000	572 000	391 145	62,5%	68,4%	42,7%
Lithuania	1 565 000	1 255 000	608 984	80,2%	48,5%	38,9%

Annex: country data (2/2)

	HOUSEHOLDS	FTTH/B Homes Passed	FTTH/B Subscribers	Coverage rate	Take-up rate	Penetration rate
Luxembourg	315 000	267 000	167 900	84,8%	62,9%	53,3%
Malta	192 000	160 000	95 000	83,3%	59,4%	49,5%
Netherlands	8 400 000	7 805 350	2 964 000	92,9%	38,0%	35,3%
North Macedonia	590 000	334 129	219 000	56,6%	65,5%	37,1%
Norway	2 617 268	2 360 776	1 779 345	90,2%	75,4%	68,0%
Poland	15 396 785	10 850 000	4 448 000	70,5%	41,0%	28,9%
Portugal	4 149 096	3 781 130	3 400 000	91,1%	89,9%	81,9%
Romania	7 530 000	7 048 000	5 760 000	93,6%	81,7%	76,5%
Serbia	2 423 000	1 906 000	727 500	78,7%	38,2%	30,0%
Slovakia	1 833 150	1 207 537	775 000	65,9%	64,2%	42,3%
Slovenia	896 445	730 000	353 000	81,4%	48,4%	39,4%
Spain	19 310 776	17 140 000	15 602 485	88,8%	91,0%	80,8%
Sweden	5 037 000	4 382 000	3 586 700	87,0%	81,9%	71,2%
Switzerland	4 072 204	2 341 000	1 271 000	57,5%	54,3%	31,2%
Turkey	27 000 000	20 760 000	7 746 000	76,9%	37,3%	28,7%
Ukraine	14 166 667	11 000 000	7 550 000	77,6%	68,6%	53,3%
United Kingdom	30 161 290	21 415 000	7 942 000	71,0%	37,1%	26,3%

(*) : 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.