Bern, 18. März 2026
Medienmitteilung

Schweizer Glasfaserabdeckung verbessert sich stark im europäischen Vergleich – 54% aller Wohnungen und Geschäfte in der Schweiz haben Glasfaser

Die neuesten Zahlen des FTTH Council Europe zeigen, dass die Schweiz beim Glasfaserausbau im 2025 weiter Fortschritte machte, im europäischen Vergleich holt man zum Durchschnitt auf. Mit einer FTTH-Abdeckung von 72 % (von 4,1 Millionen Haushalten gem. BFS) liegt die Schweiz noch etwas unter dem europäischen Durchschnitt von 79 %. Wenn man die Abdeckung anhand der 5.5 Mio Wohnungen und Geschäfte misst, so beträgt diese 54%

Die Nutzungsrate von Glasfaseranschlüssen (Take-up Rate) liegt bei 51 %, was im Vergleich zu 2024 ein leichter Rückgang (-3PP) darstellt, dieser ist aufgrund der vielen Neuanschlüsse zurückzuführen, welche erst noch ausgelastet werden müssen.

Die Swiss Fibre Net AG (SFN AG) begrüsst die Fortschritte, insbesondere, da die Schweiz nun zum europäischen Durchschnitt aufgeholt hat.

Die Schweiz im europäischen Vergleich:

- **FTTH-Abdeckung:** 72%(EU39-Durchschnitt: 79%), bei 5.5 Mio Haushalten/Geschäften 54%
- **Take-up Rate:** 51%(EU39-Durchschnitt: 54%)
- **Penetrationsrate:** 37%(EU39-Durchschnitt:43%)

Diese Zahlen zeigen, dass die Schweiz deutliche Fortschritte gemacht hat. Jedoch haben andere Länder wie UK (Abdeckung 80%) oder Deutschland (Abdeckung 56%) ebenfalls zugelegt.

Weiterer Handlungsbedarf:
Die SFN AG sieht trotzdem die Notwendigkeit, den Glasfaserausbau weiter zu beschleunigen. Die aktuellen Pläne des Bundesrats, mit einem Breitbandförderungsgesetz Fördermittel ab 2028 bereitzustellen, kommen eher spät. 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, CEO Swiss Fibre Net AG fügt hinzu:
«Die neuesten Zahlen zur Glasfaserabdeckung in der Schweiz sind eine gute Botschaft, v.a im Vergleich zu den europäischen Nachbarn haben wir aufgeholt. Aber bei 54% Abdeckung von Wohnungen und Geschäften sind immer noch viele Gebiete (v.a ländliche) nicht mit Glasfasern versorgt, hier gibt es in den nächsten Jahren noch Handlungsbedarf. Eine starker und intakter Infrastrukturwettbewerb ist die Grundlage dazu.»

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.

Kontakt für Medienanfragen und weitere Informationen:

Andreas Waber
CEO Swiss Fibre Net AG
+41 79 668 90 78
andreas.waber@swissfibrenet.ch
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 2026

FTTH/B Market Panorama in Europe

September 2025

FTTH Council Europe’s Market Intelligence Committee

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 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:

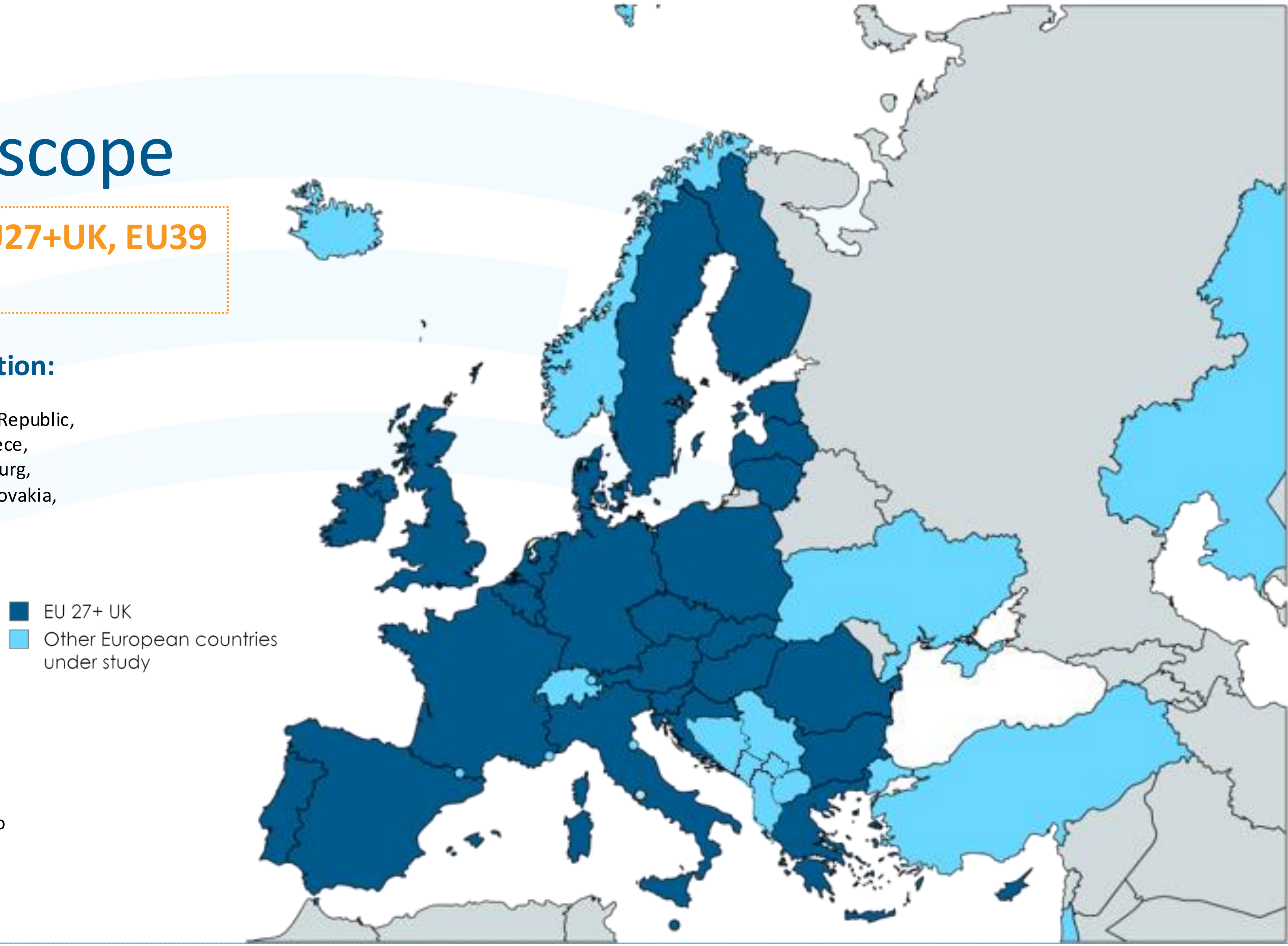
Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

EU 39 detailed composition:

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

4 news countries analyzed :

Albania, Bosnia-Herzegovina, Kosovo, Montenegro



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

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 COUNCIL EUROPE

FTTH/B Market Panorama

Key Figures as of September 2025 in EU39[(1)]

295 million FTTH/B Homes Passed

160 million FTTH/B Subscribers

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%

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.

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

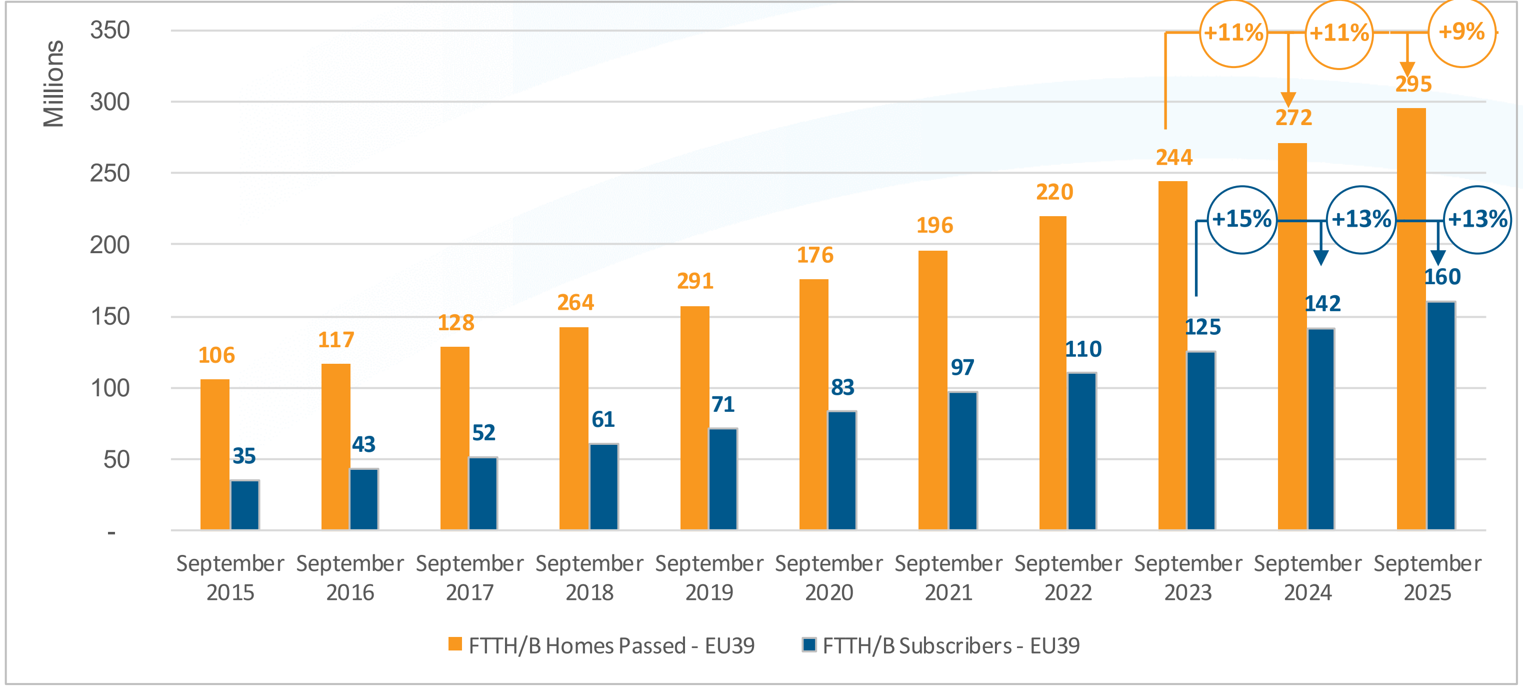
FTTH/B Market Panorama

Key trends as of September 2025

- 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.

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

In terms of Homes Passed and Subscribers (2015-2025)



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.

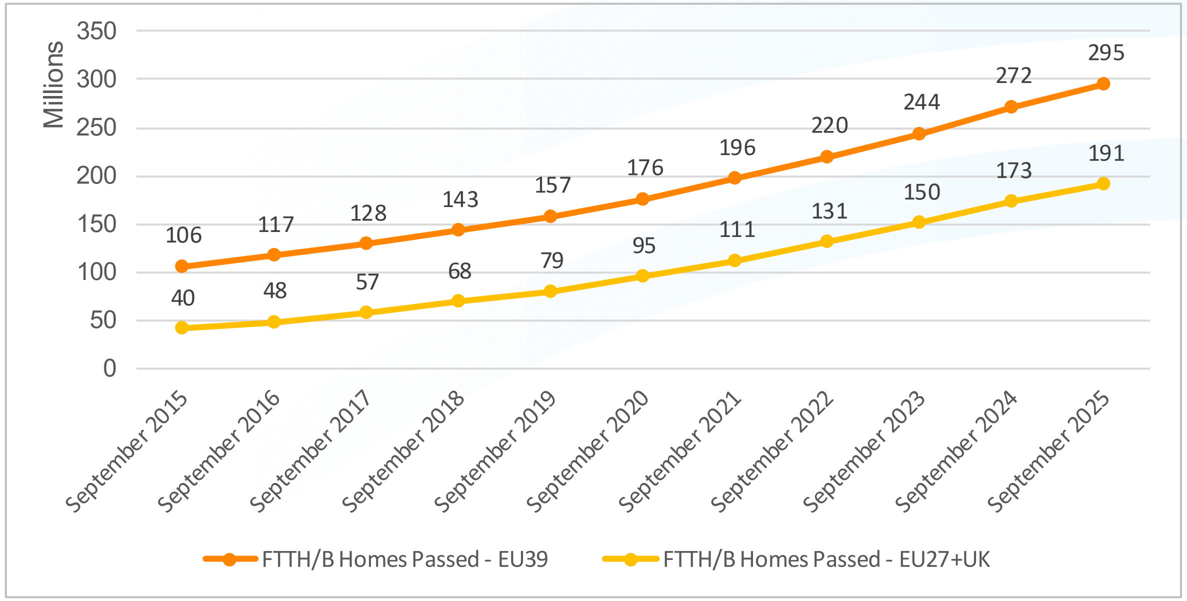
Note: see slide 6 for the definition of the rates

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

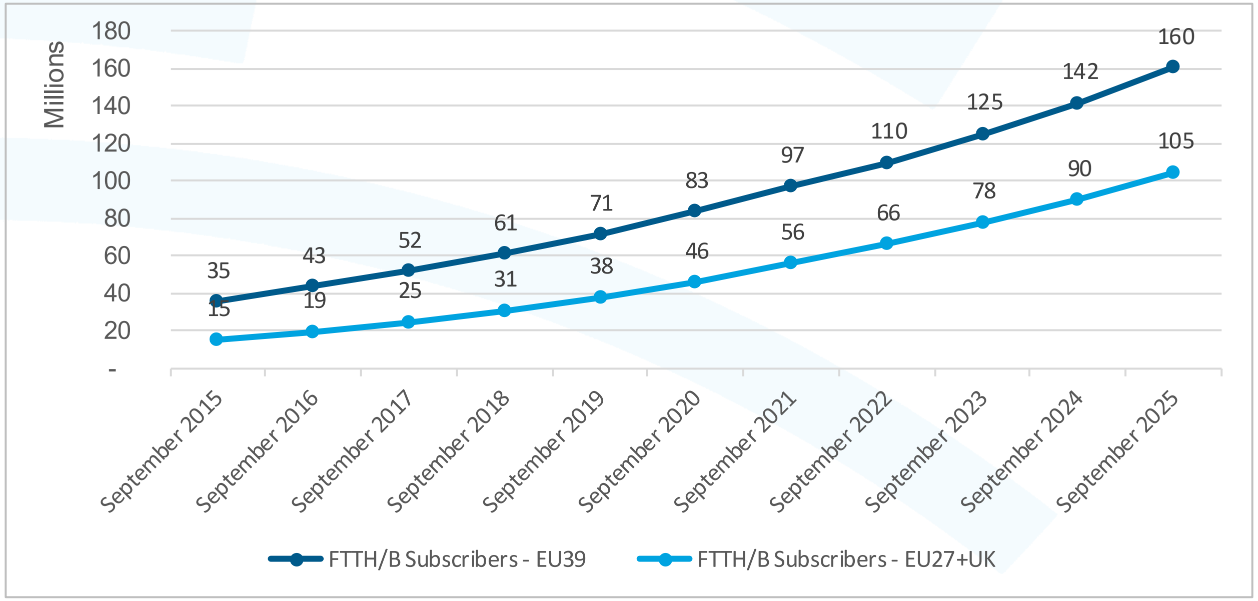
FTTH/B Market Panorama

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 2025	SEPT 2015
Proportion of the total Homes Passed represented by EU 27 + UK	64.59% (+0.98 p.p 2024)	38.10%
Proportion of the total Subscribers represented by EU 27 + UK	65.22% (+1.77 p.p 2024)	42.56%

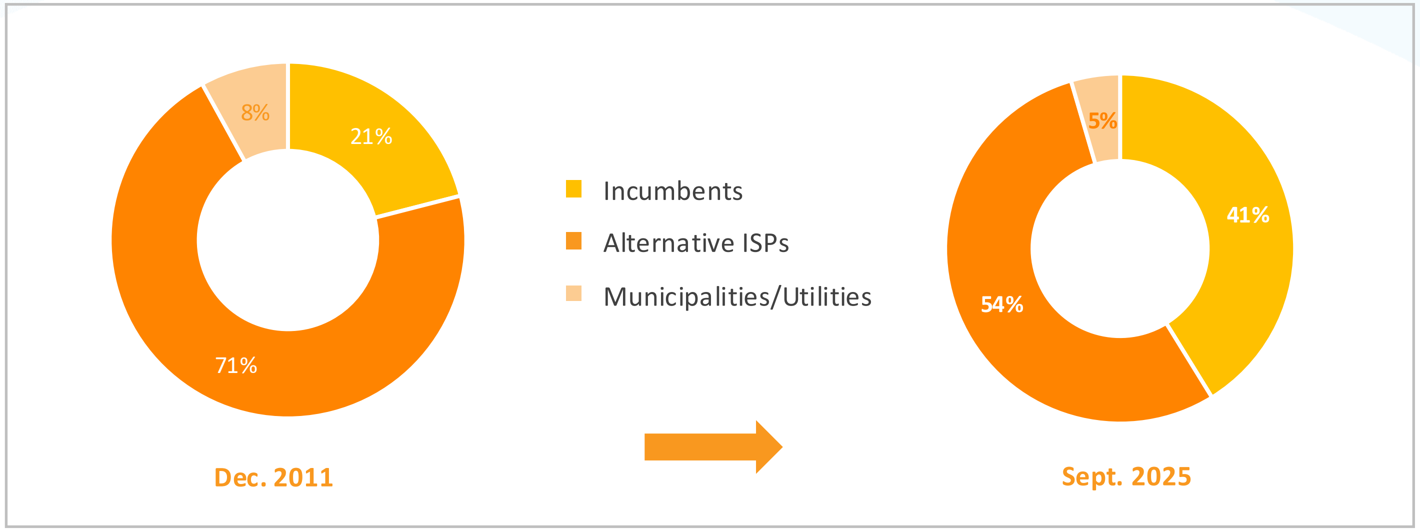
FTTH/B Market Panorama

FTTH/B initiative types

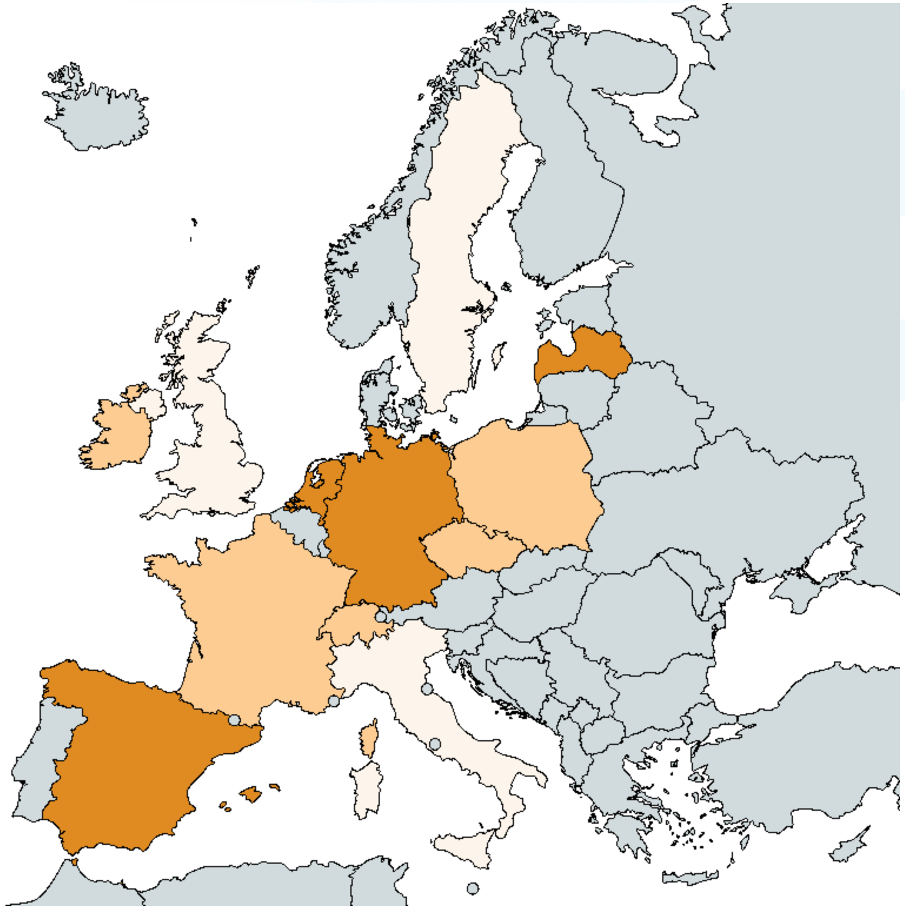
- FTTH/B initiative refers to the number of public and private players who have launched FTTH/B projects since fibre rollouts began.
- Market Status (as of September 2025):
  - Around 430 FTTH/B initiatives identified across EUR39
  - Alternative operators remain the leaders in terms of the number of 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**

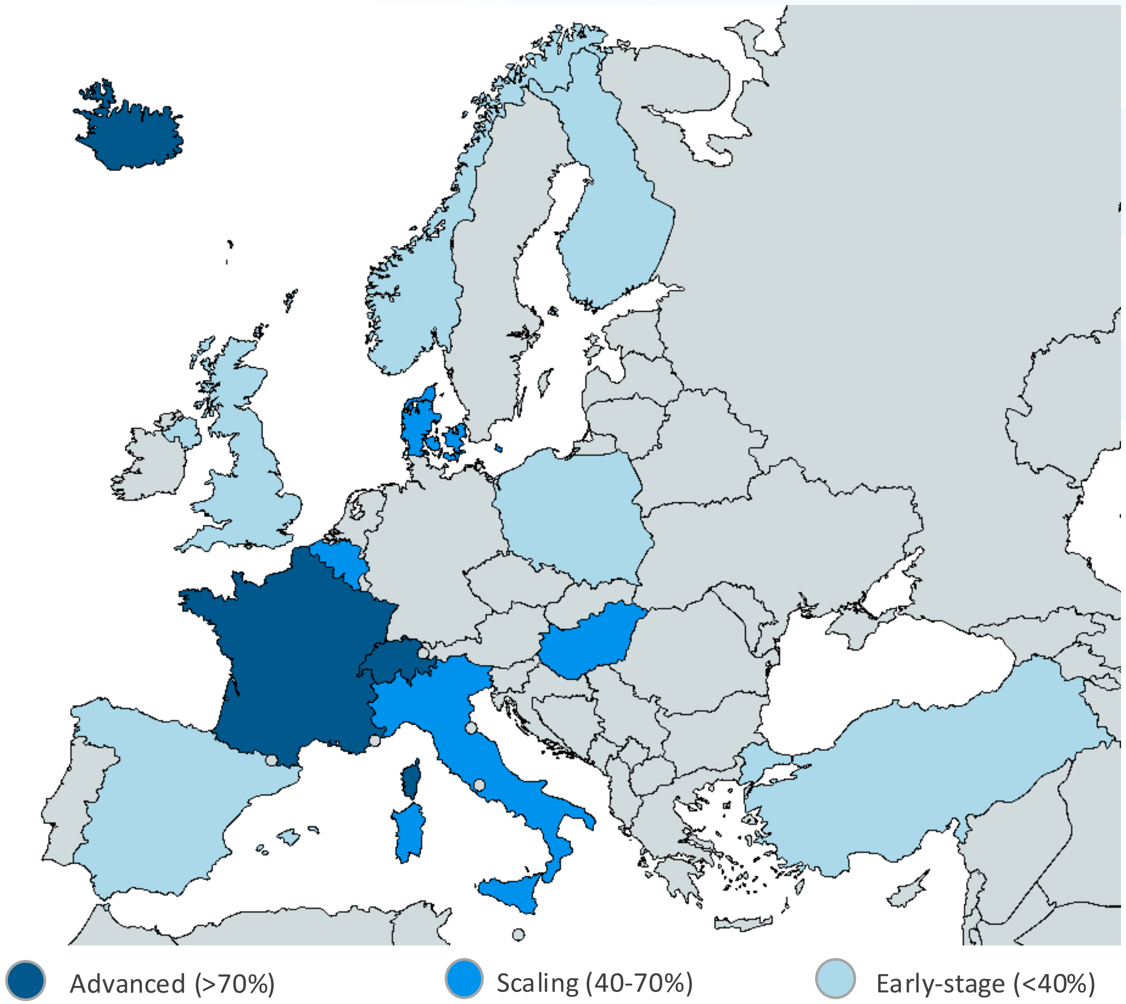
In countries such as **Germany, Spain and the Netherlands**, FTTH deployment continues to be primarily led by incumbent or integrated telecom operators.

- **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.

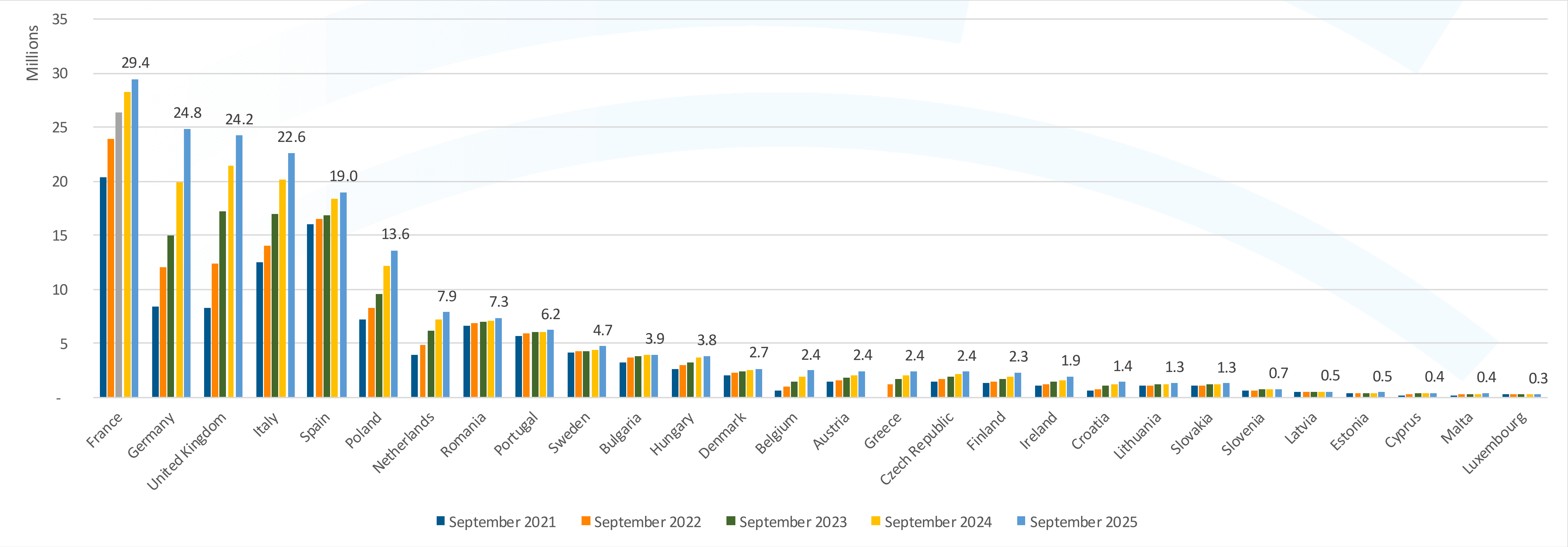
3. FTTH/B Homes passed, Coverage rate and Sockets deployed

FTTH COUNCIL EUROPE

With thanks to IDATE

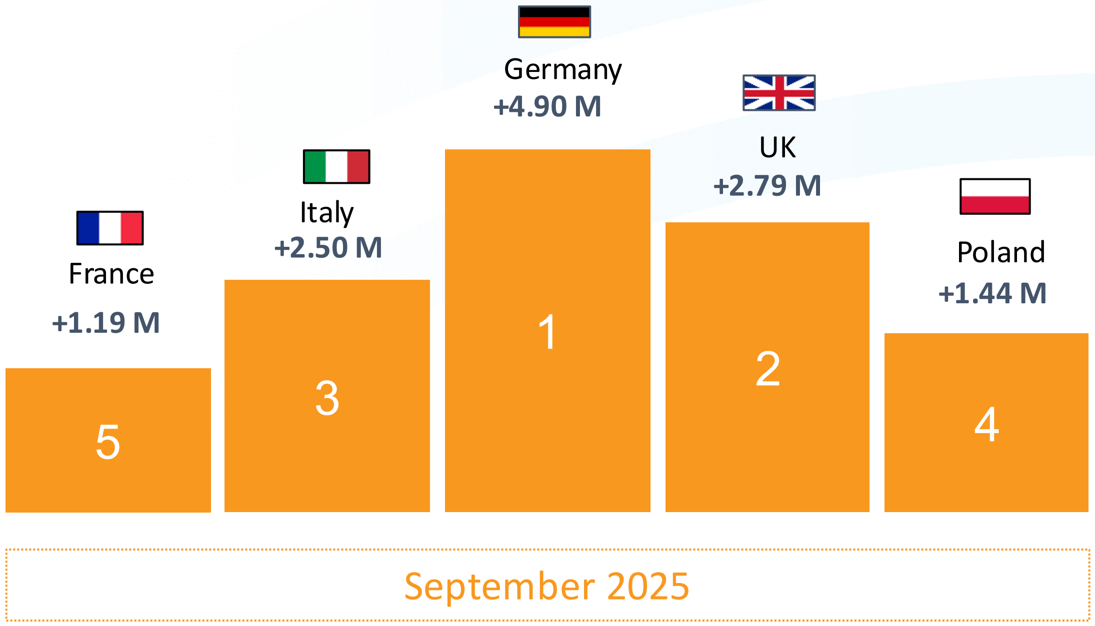
FTTH/B Homes Passed – EU27 + UK Ranking

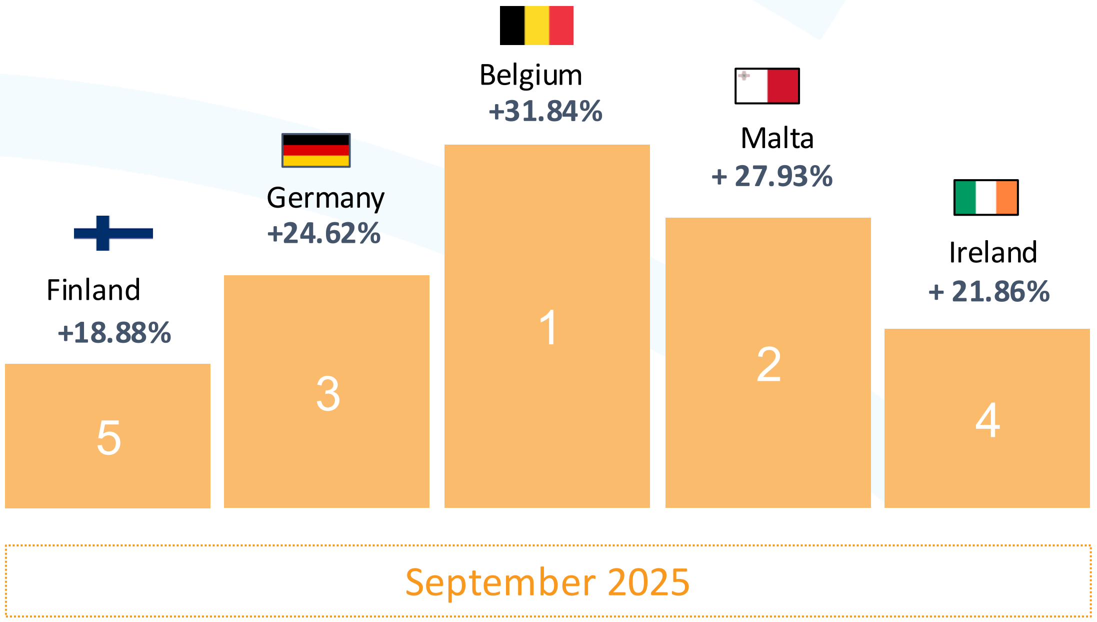
EU27+UK ranking in terms of FTTH/B Homes passed over time (in million homes)
Data comparison between Sept. 2021 and Sept. 2025



FTTH/B Homes Passed – EU27 + UK Ranking

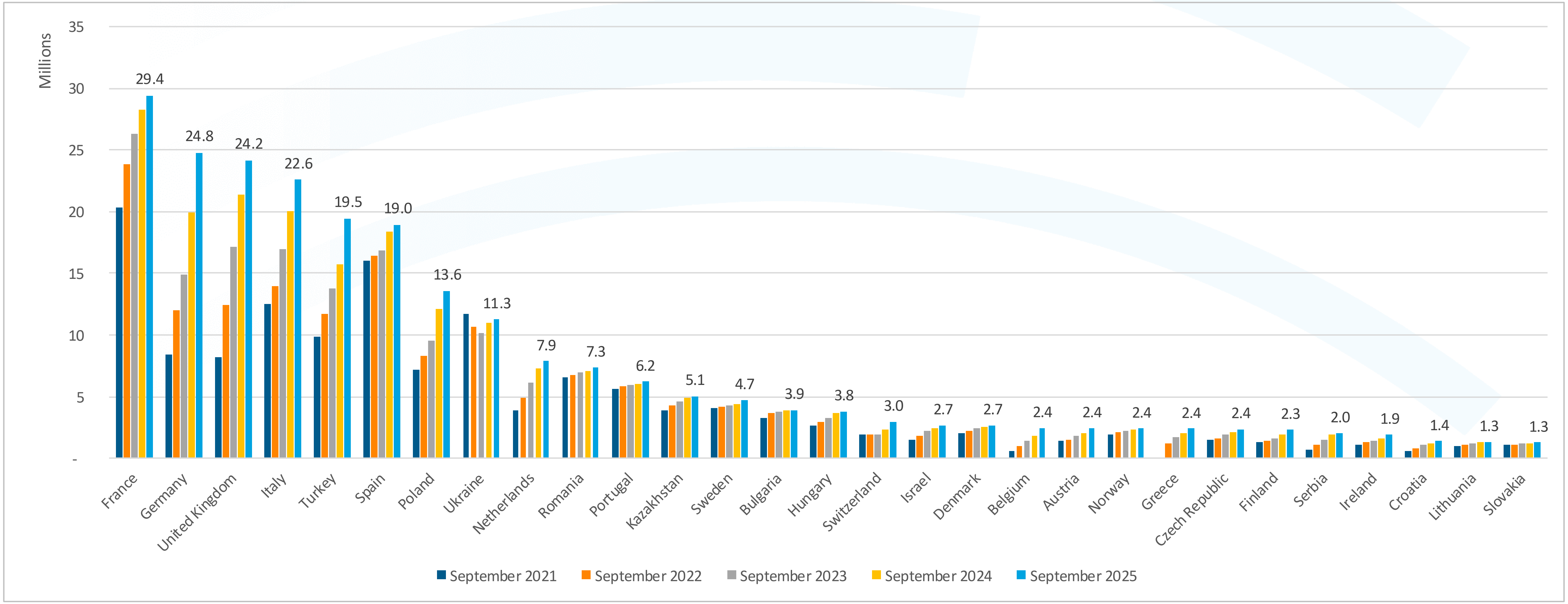
5 fastest growing markets (in both volume and %)
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Homes Passed)





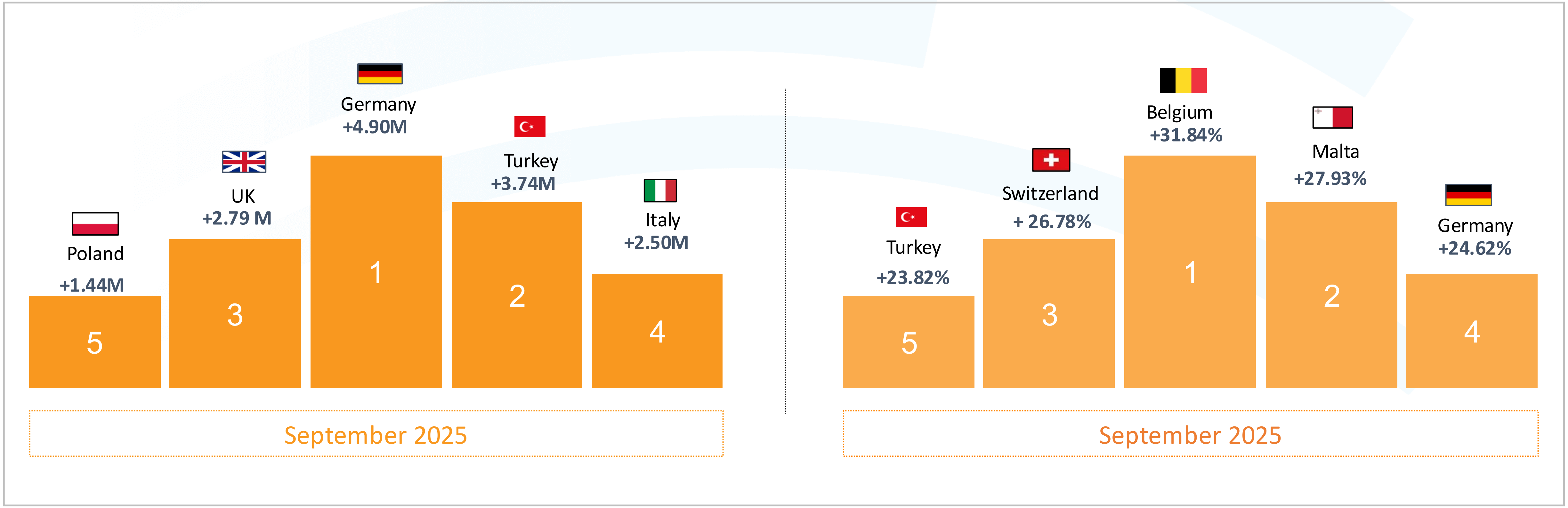
FTTH/B Homes Passed – EU39 Ranking

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)



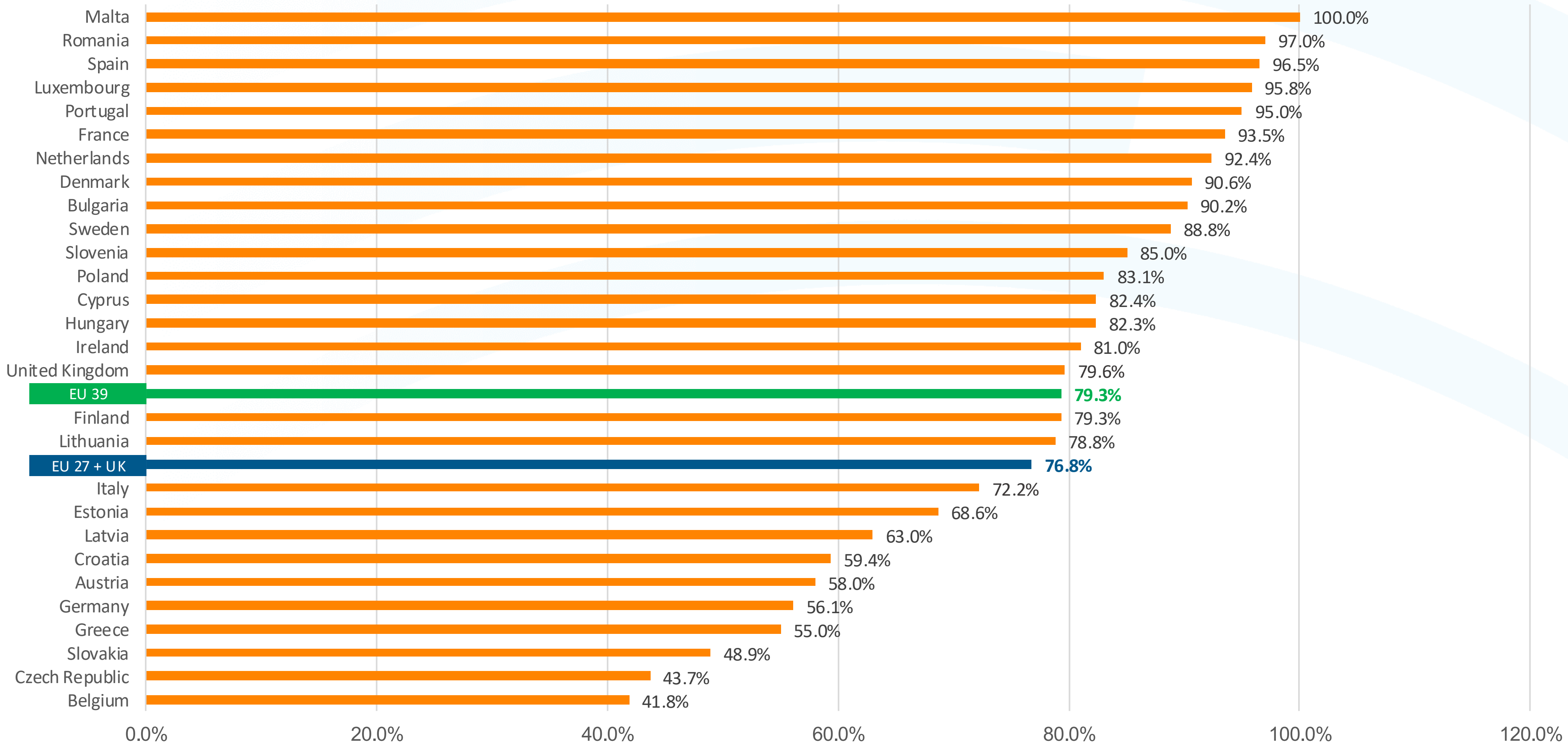
FTTH/B Homes Passed – EU39 Ranking

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



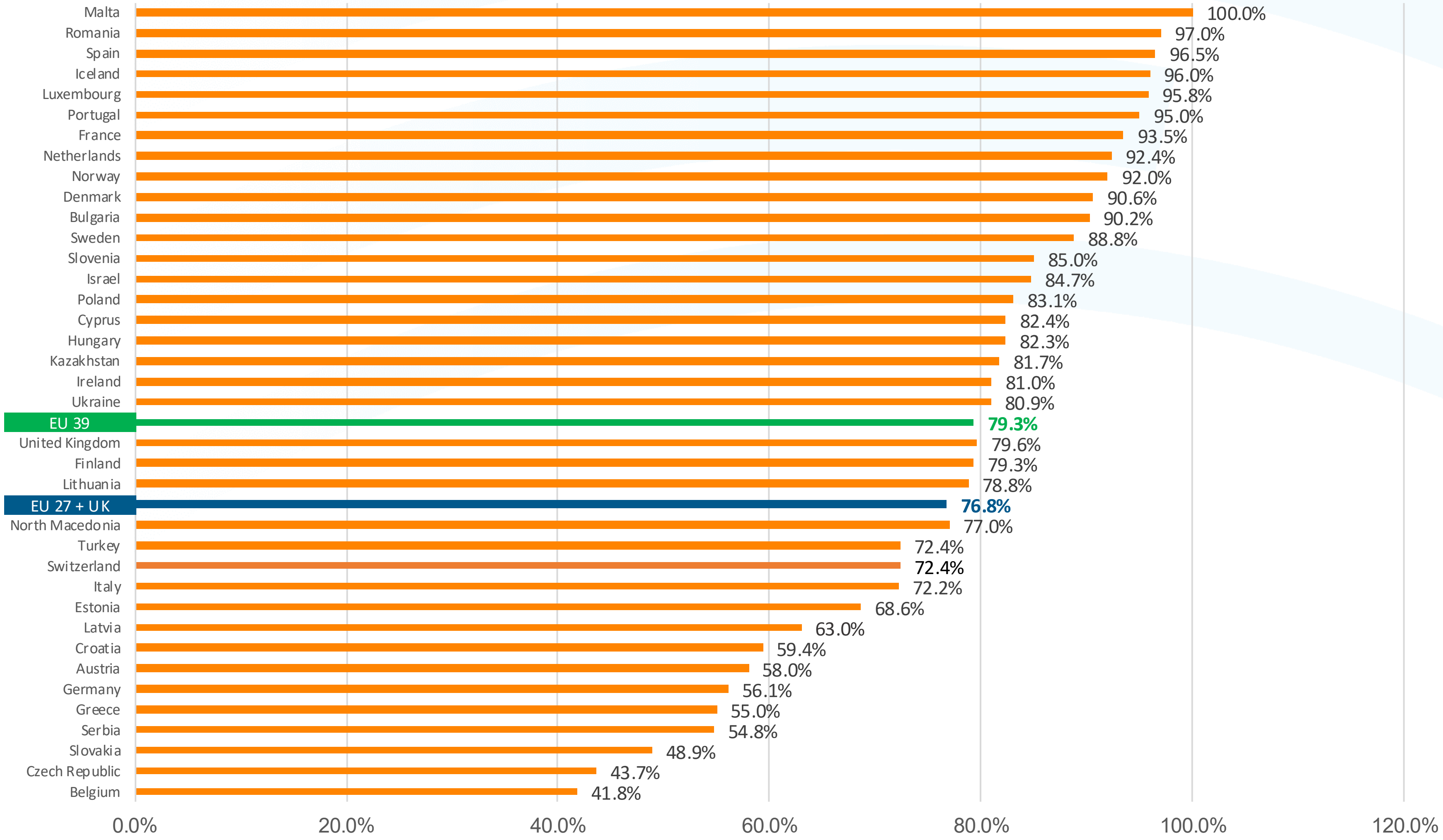
Coverage rate, European leaderboards – EU27+UK

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

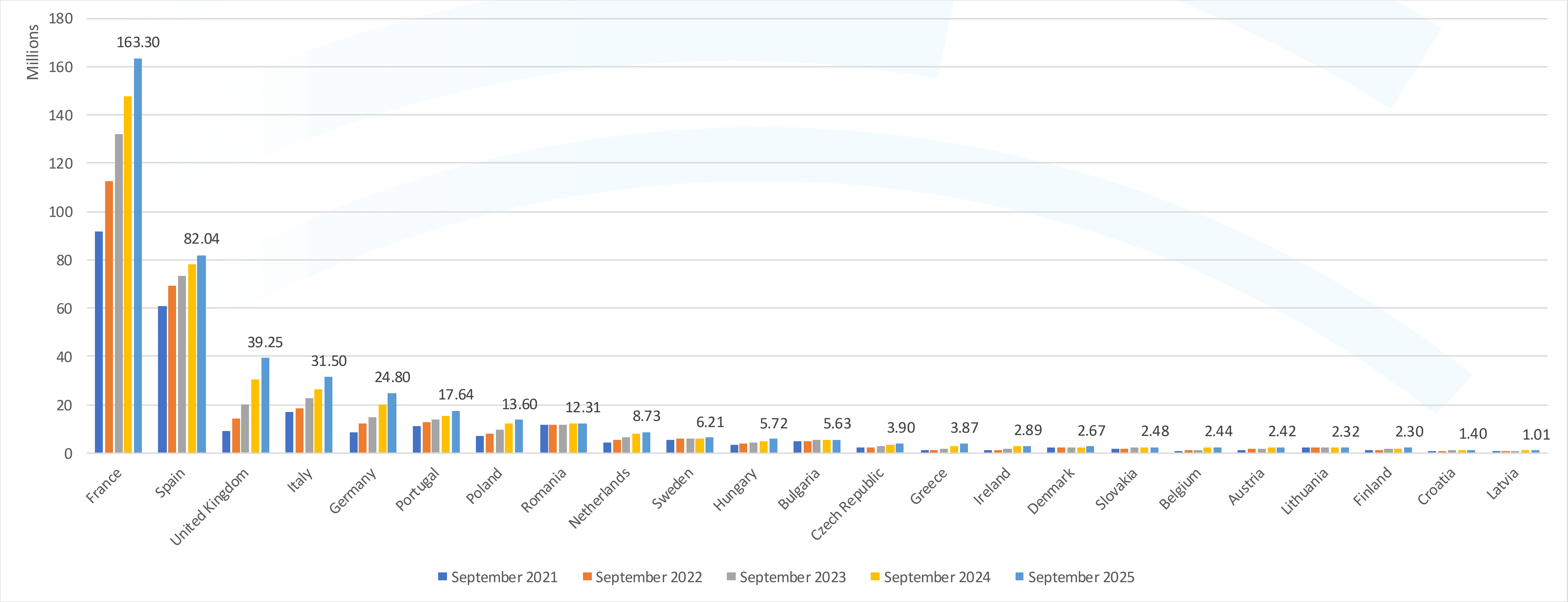


- FTTH/B coverage reflects diverse national deployment trajectories across EU39, shaped by geography, market structure and policy choices.
- A growing number of countries now exceed the 75–80% coverage threshold, pulling the European average upward.
- High-coverage markets are nearing a practical deployment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

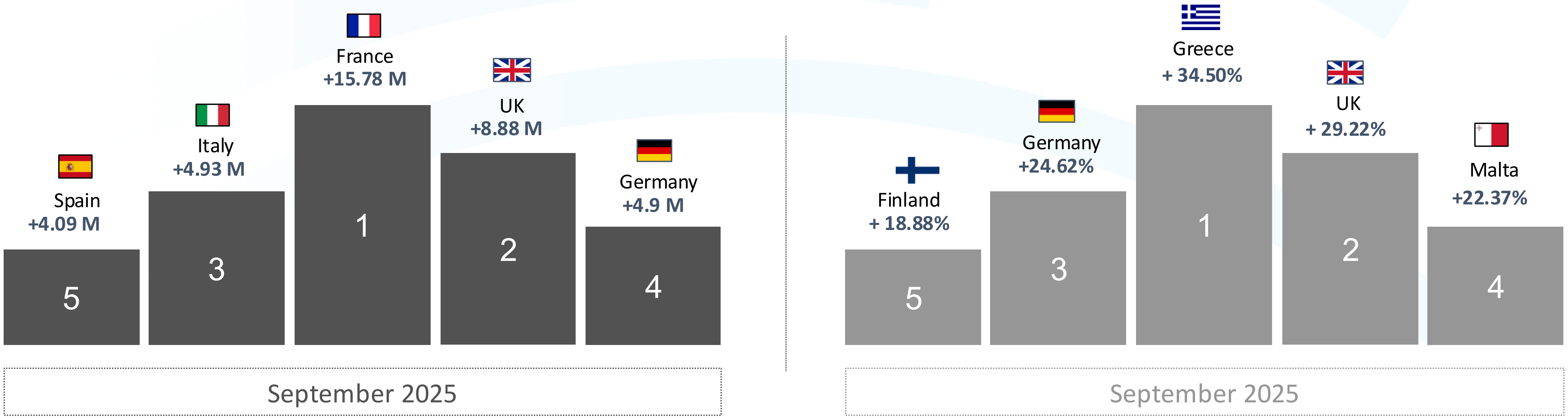
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Sockets Deployed - EU27+UK Ranking

5 fastest growing markets (in both volume and %)

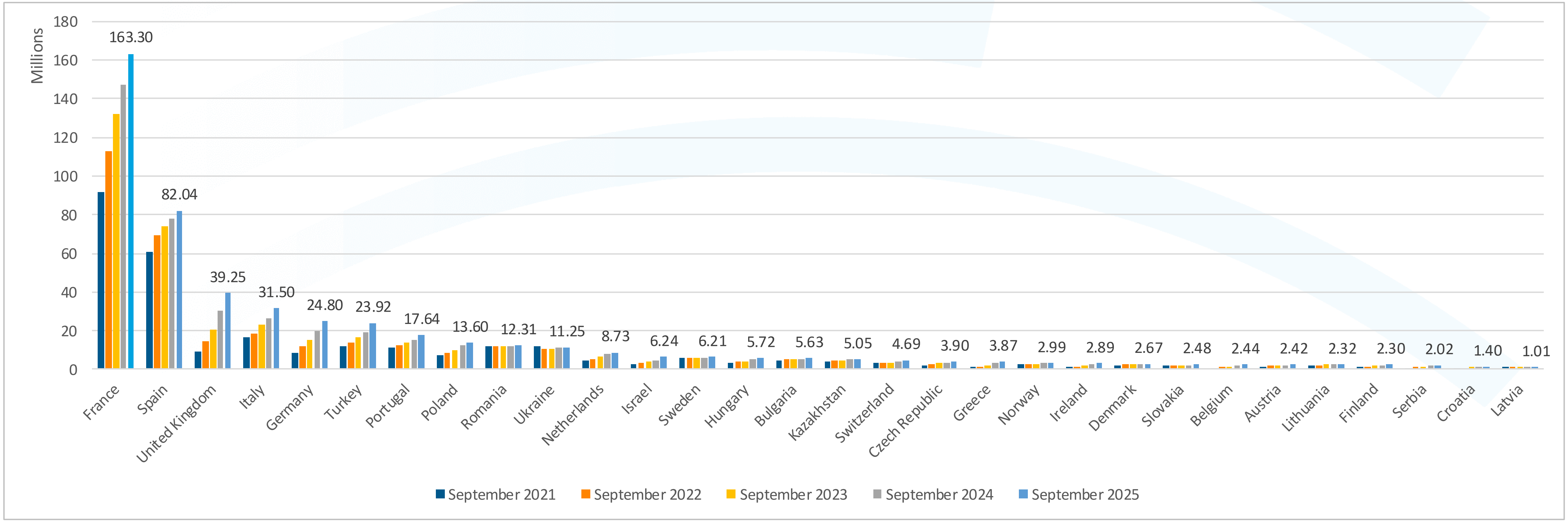
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Sockets Deployed)



FTTH/B Sockets Deployed - EU39

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

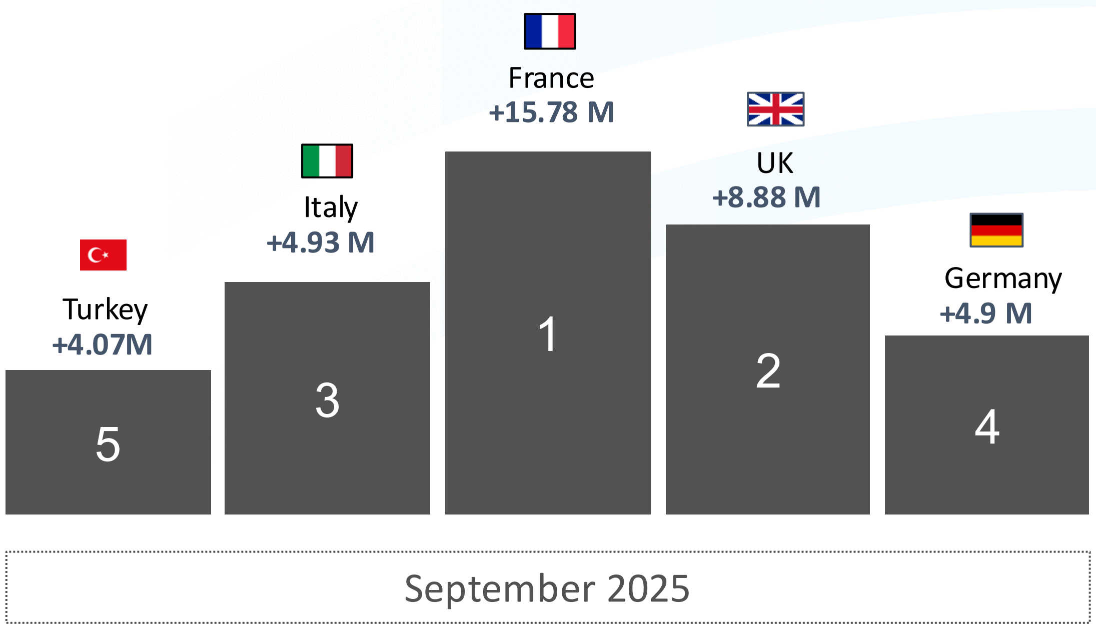
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)

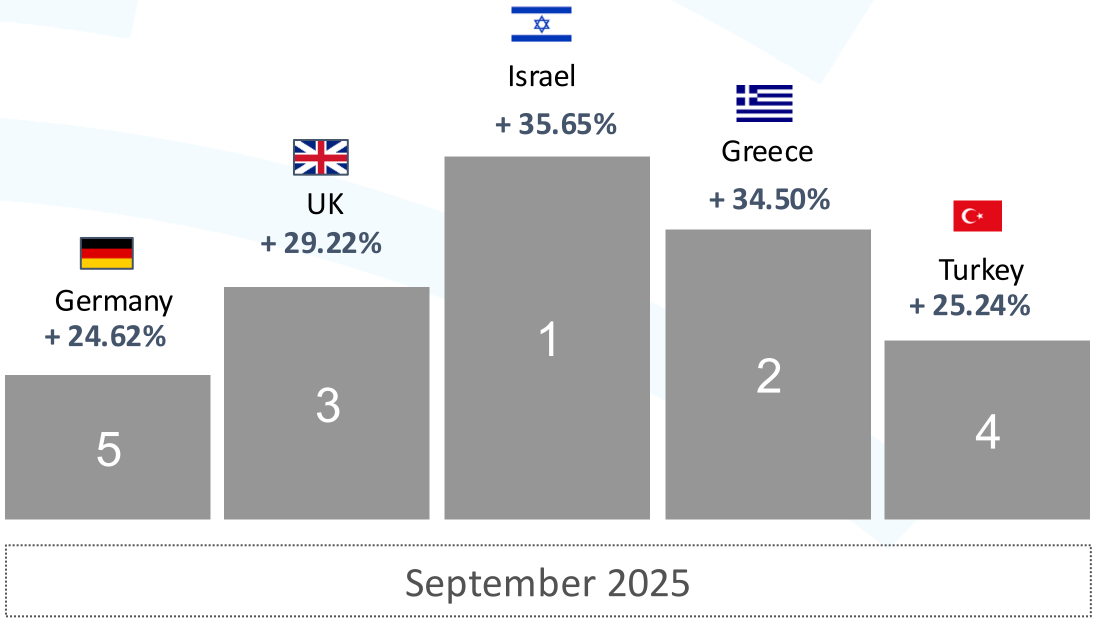


FTTH/B Sockets Deployed - EU39

5 fastest growing markets (in both volume and %)

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

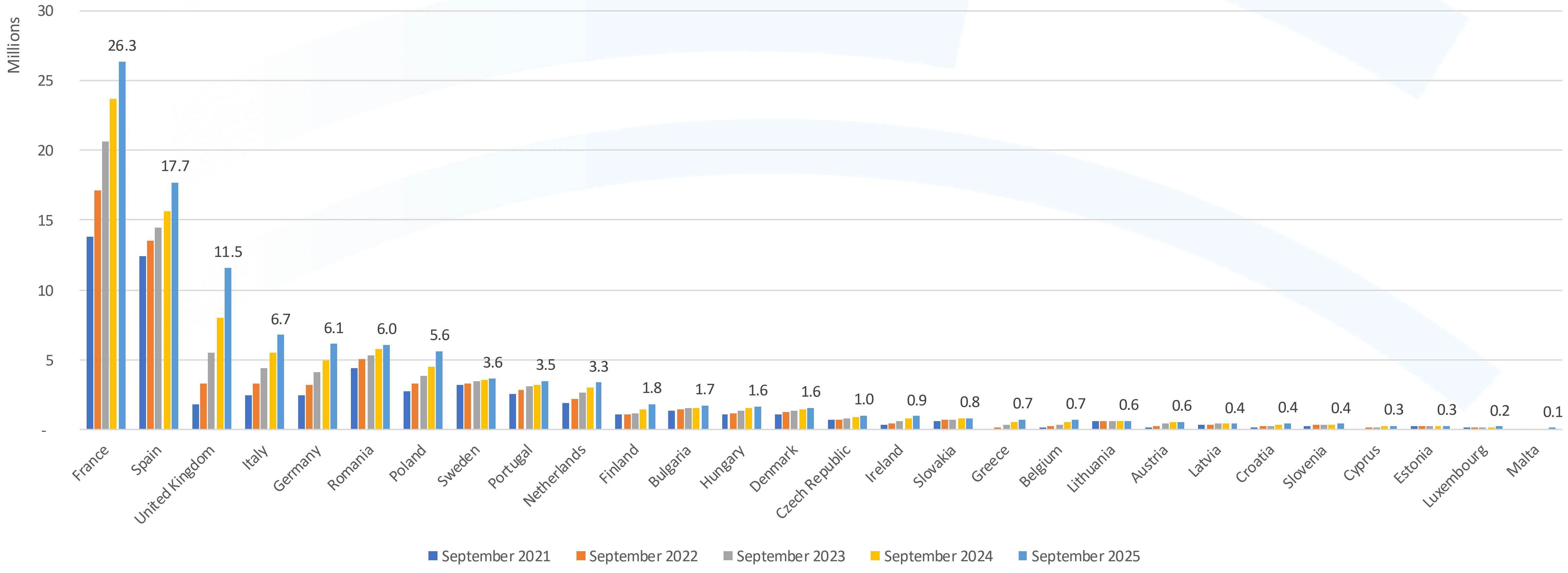




4. FTTH/B Subscribers and Take-up rate

FTTH/B Subscribers – EU27 + UK

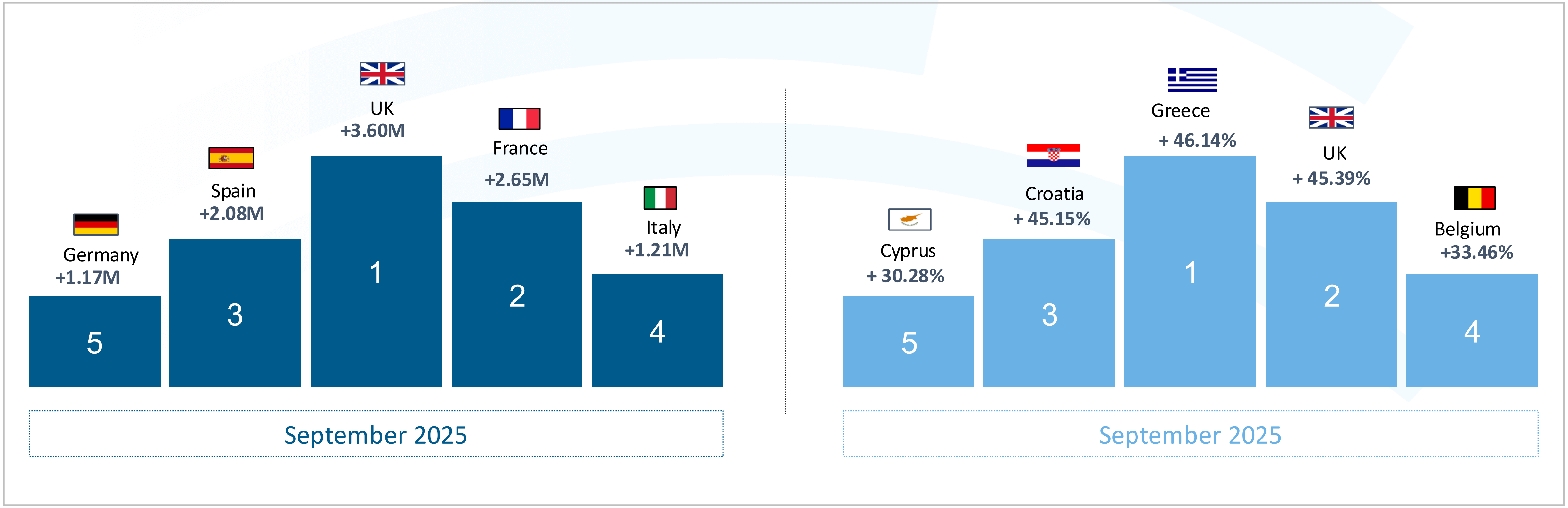
EU27+UK ranking in terms of FTTH/B Subscriptions over time (in thousands homes)
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Subscribers – EU27 + UK

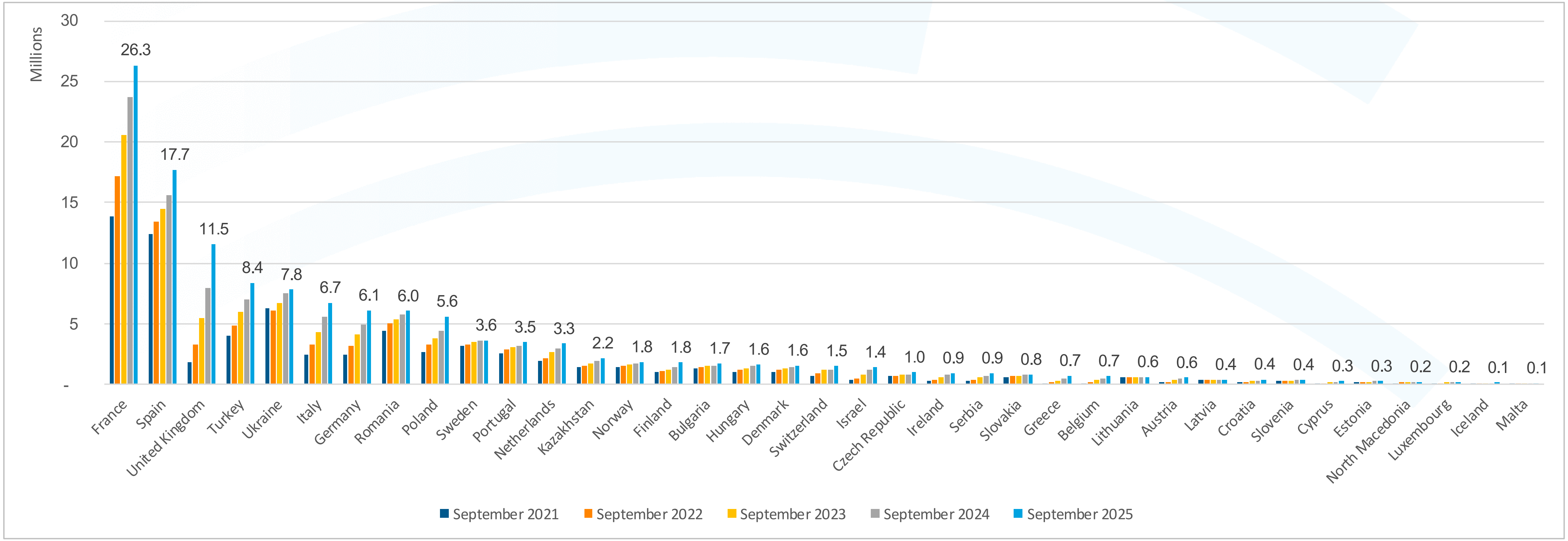
5 fastest growing markets (in both volume and %)

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



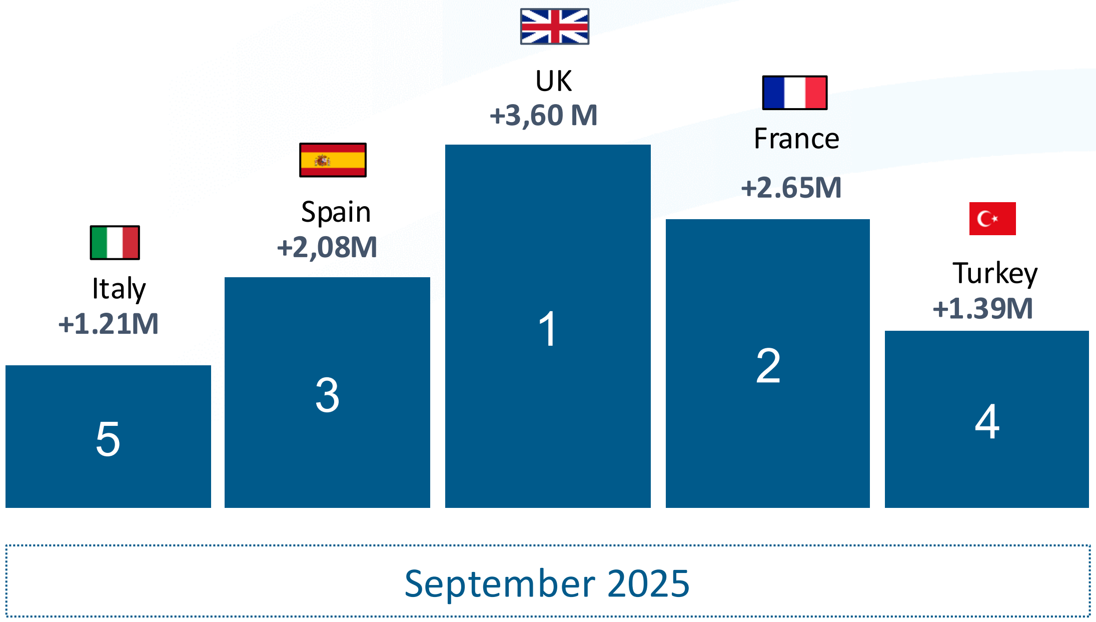
FTTH/B Subscribers – EU39

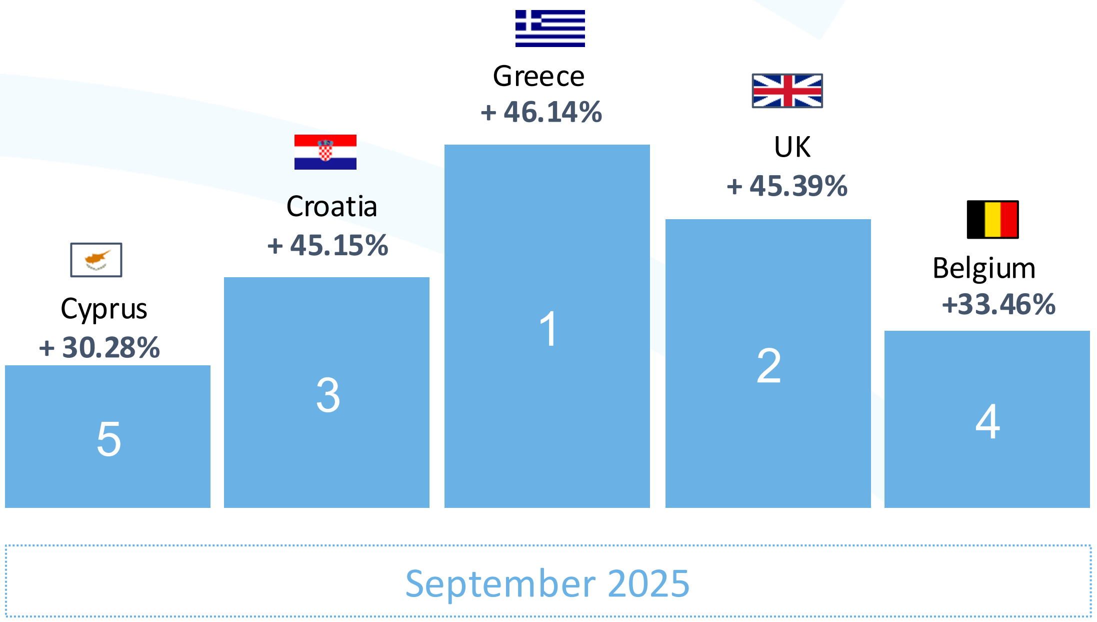
EU39 ranking in terms of FTTH/B Subscriptions over time (in thousands homes)
Data comparison between Sept. 2021 and Sept. 2025 (in million homes)



FTTH/B Subscribers – EU39

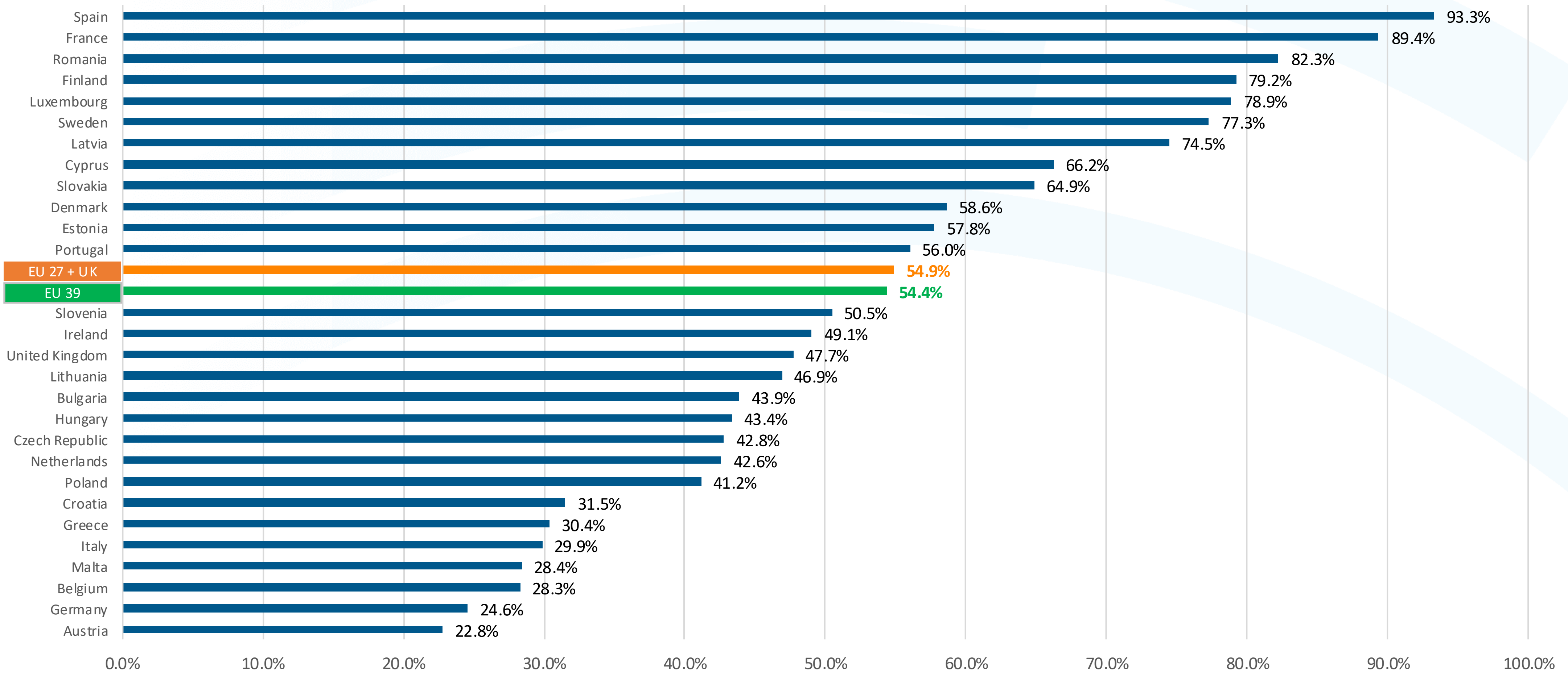
5 fastest growing markets (in both volume and %)
Data from Sept. 2024 to Sept. 2025 (in terms of FTTH/B Subscribers)





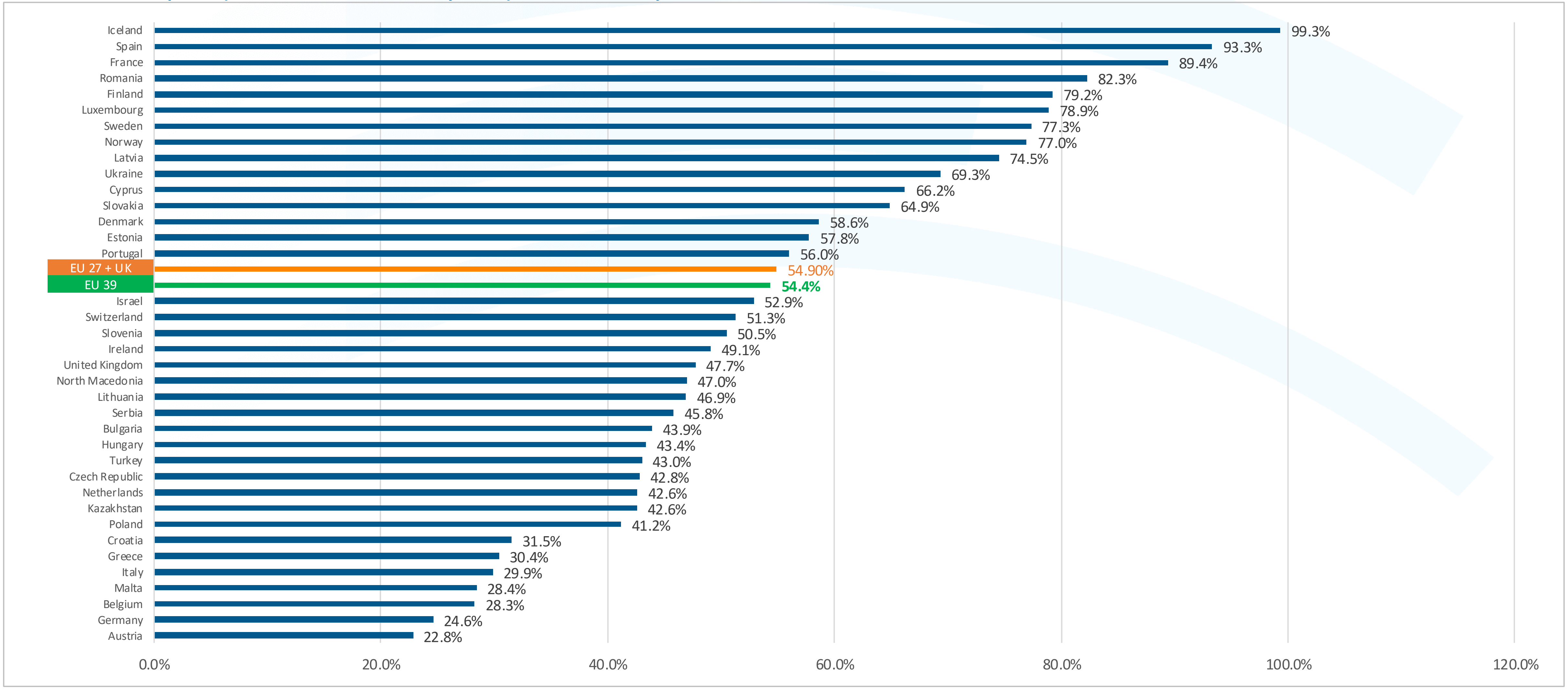
Take-up rate, European leaderboards – EU27+UK

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

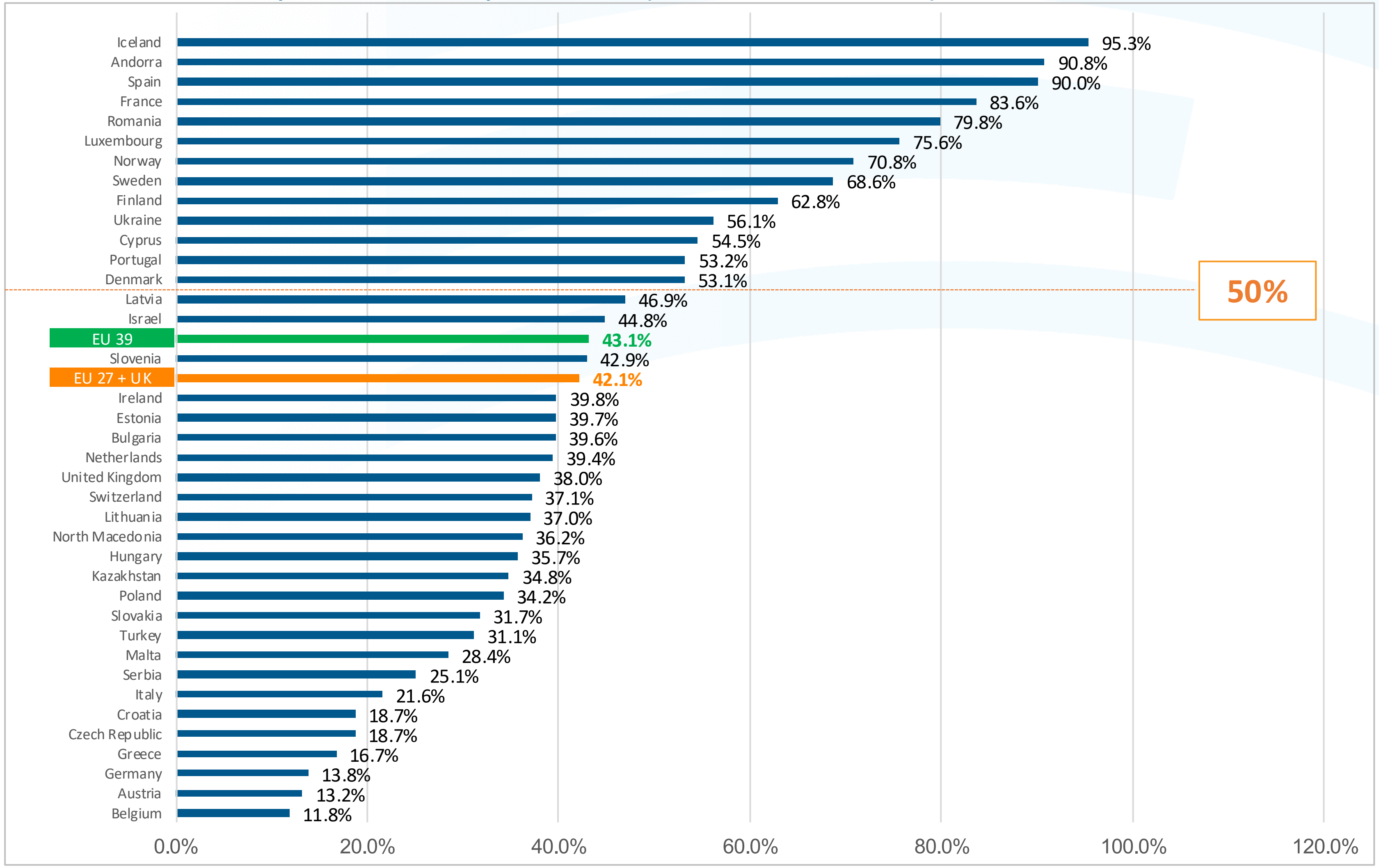


5. FTTH/B Penetration rate

FTTH COUNCIL EUROPE

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

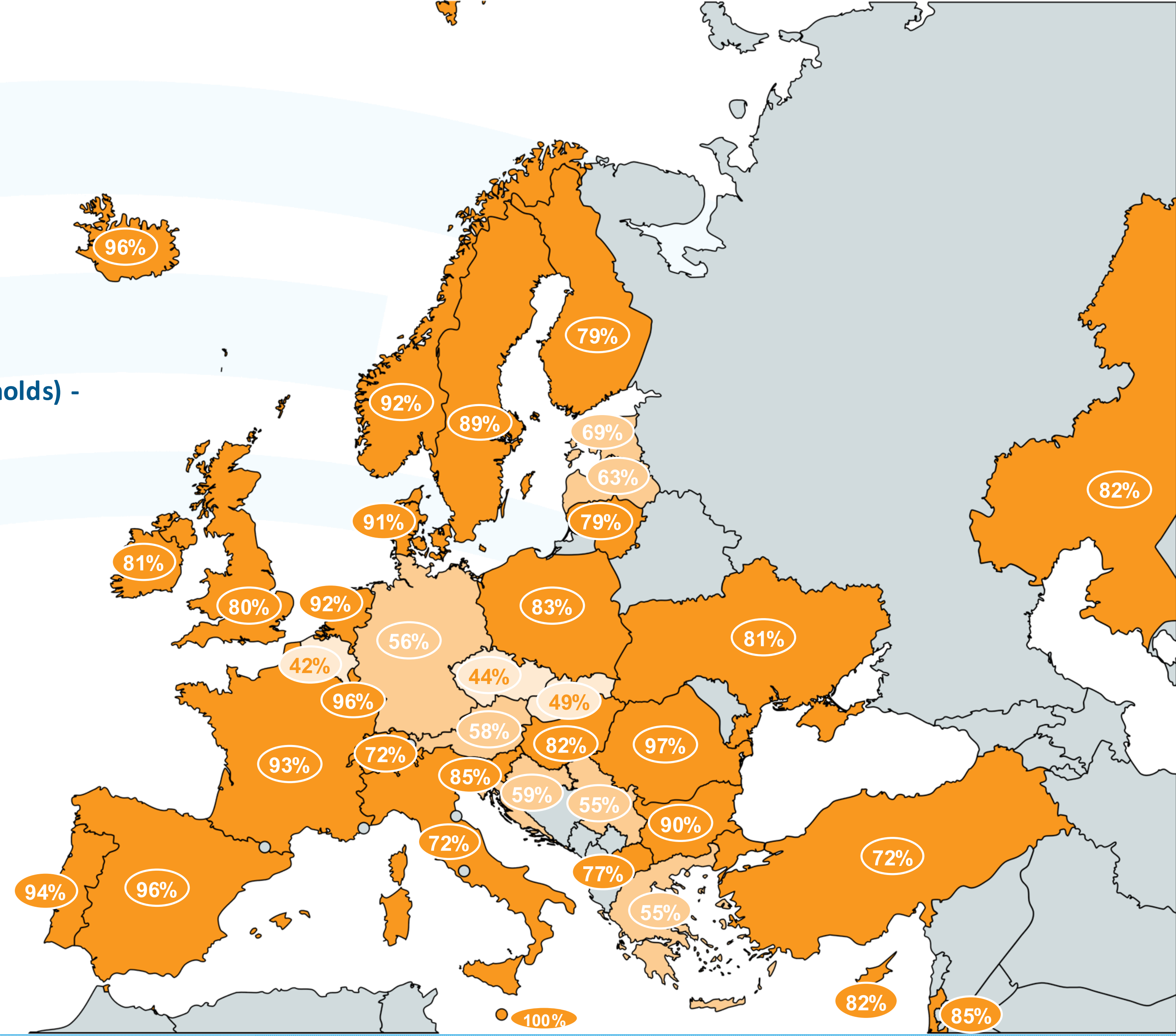
Summary map

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.

Take-up rate, European leaderboards

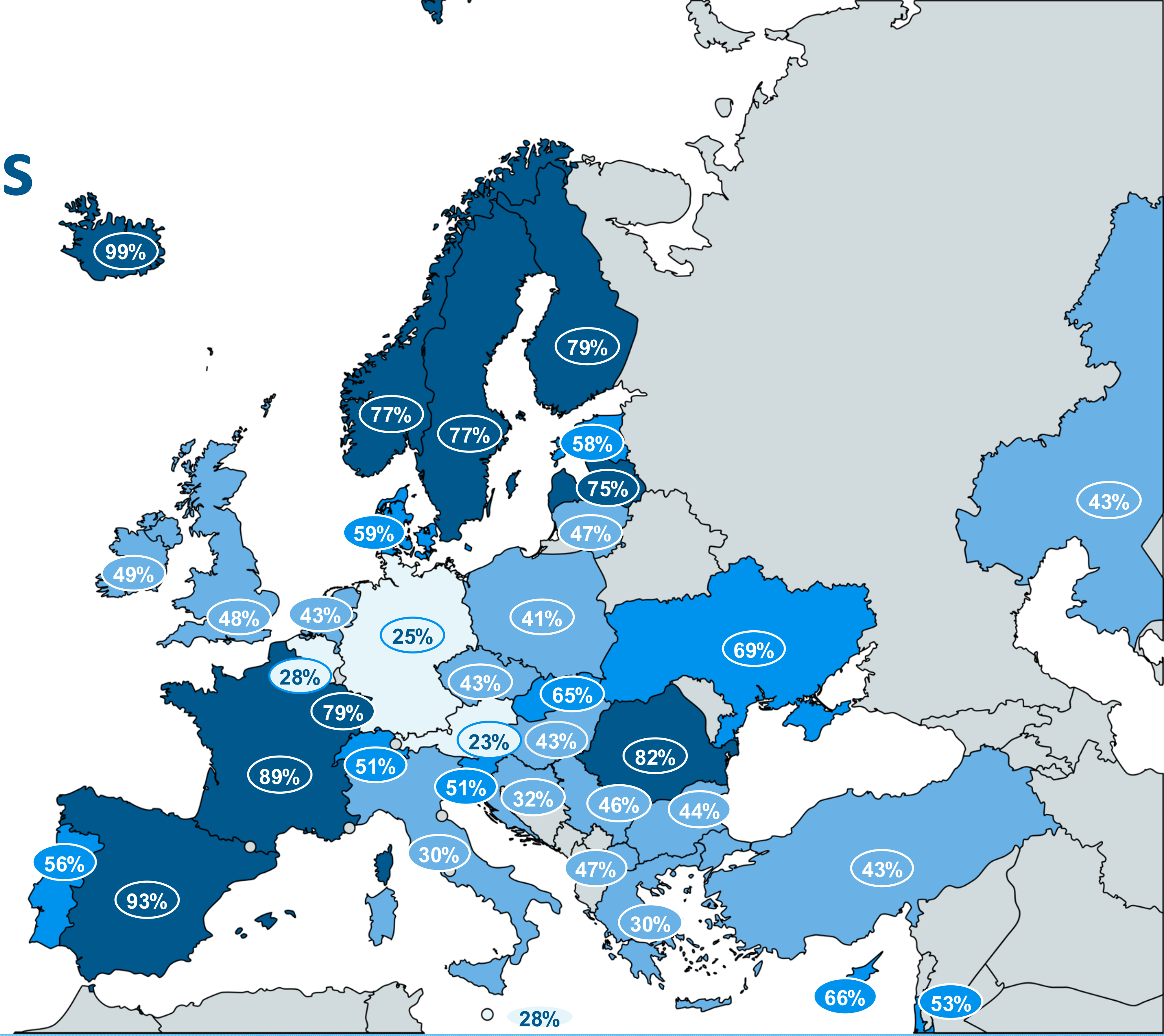
FTTH/B take-up rate (subscribers / households passed) as of September 2025

TAKE-UP RATE*

EU27+UK: **54.9% (+ 2.5 p.p yoy)**

EU39 : **54.4% (+ 2.0 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

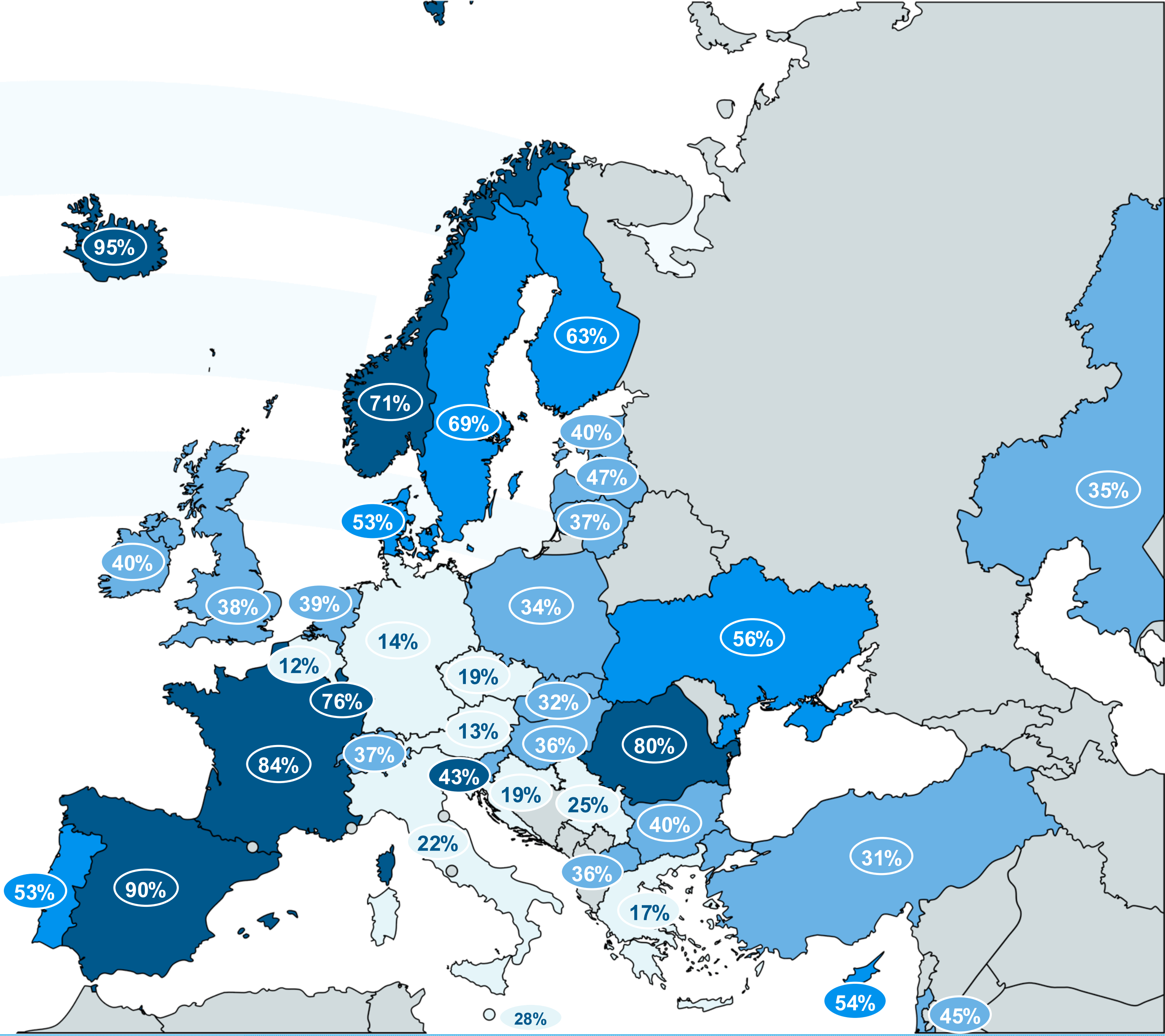
Summary map

FTTH/B penetration rate map (subscribers / households) - September 2025

PENETRATION RATE*

EU27+UK: **42.1% (+ 5.7 p.p yoy)**

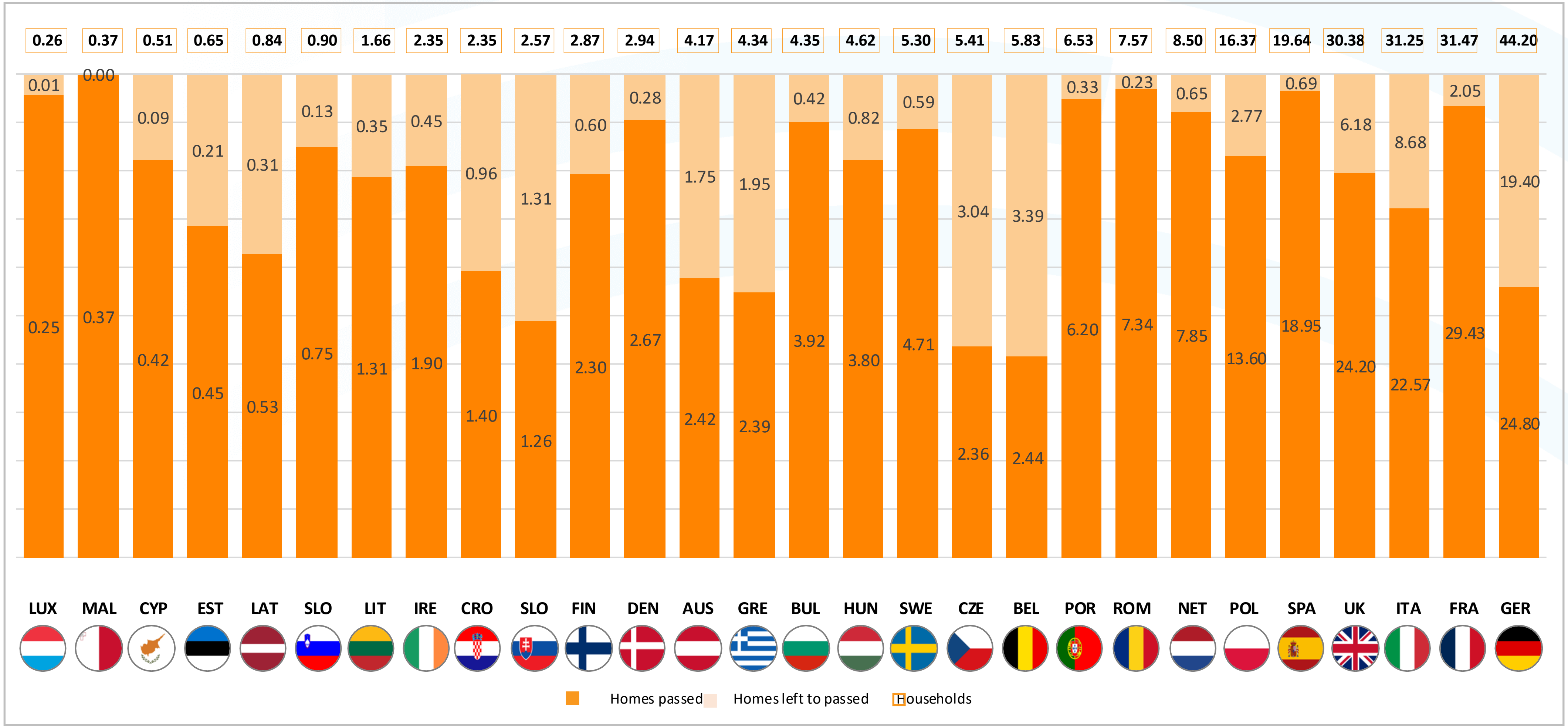
EU39 : **43.1% (+ 4.8 p.p yoy)**



(*) : 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?

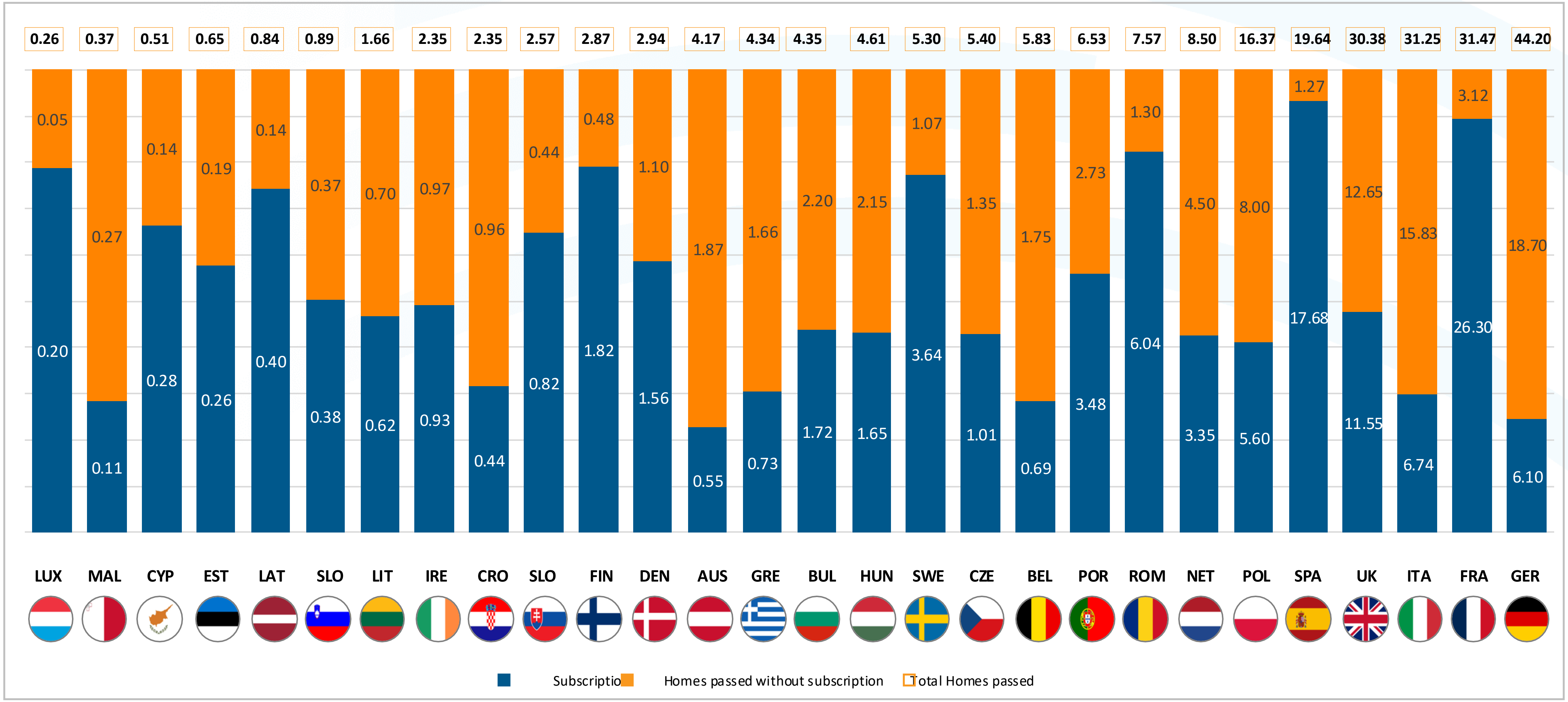
EU27+UK Ranking : Households left to pass, September 2025



- **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 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

ANDORRA

47,700 Households

47,700 Homes Passed by Fibre — 100%*

43,290 Fibre Subscribers — 91%*

* of total homes

LIECHTENSTEIN

20,800 Households

20,600 Homes Passed by Fibre — 99%*

19,200 Subscribers — 85%*

* of total homes

MONACO

23,000 Households

23,000 Homes Passed by Fibre — 100%*

20,010 Fibre Subscribers — 87%*

* of total homes

SAN MARINO

15,120 Households

14,360 Homes Passed by Fibre — 95%*

12,100 Fibre Subscribers — 74%*

* of total homes

Source: IDATE estimations for FTTH Council EUROPE

Focus on Balkan region progress

A region in transition, with uneven levels of maturity

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

ALBANIA

750,000 Households

525,000 Homes Passed by Fibre — 70%*

506,000 Fibre Subscribers — 67%*

* of total homes

BOSNIA-HERZEGOVINA

1 070 000 Households

152,800 Homes Passed by Fibre — 14%*

152,000 Fibre Subscribers — 14%*

* of total homes

KOSOVO

582,000 Households

168,000 Homes Passed by Fibre — 29%*

105,000 Fibre Subscribers — 18%*

* of total homes

MONTENEGRO

215,200 Households

163,500 Homes Passed by Fibre — 76%*

109,600 Fibre Subscribers — 51%*

* of total homes

SERBIA

3 689 000 Households

2,021,000 Homes Passed by Fibre — 70%*

926,000 Fibre Subscribers — 67%*

* of total homes

NORTH MACEDONIA

600,000 Households

462,000 Homes Passed by Fibre — 77%*

217,000 Fibre Subscribers — 36%*

* of total homes

Source: IDATE estimations for FTTH Council EUROPE

7. FTTH/B Key conclusions

FTTH COUNCIL EUROPE

With thanks to IDATE

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

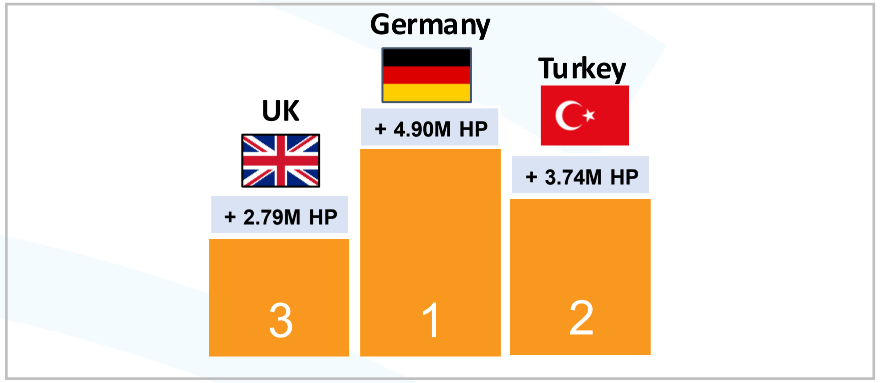
- **EU39:** 160 million subscribers, with a **54.4% take-up rate**.
- **EU27+UK:** Around 130 million homes passed remain unsubscribed, confirming that adoption is now the main challenge.
- Growth is increasingly driven by migration from legacy networks.

Market shift

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

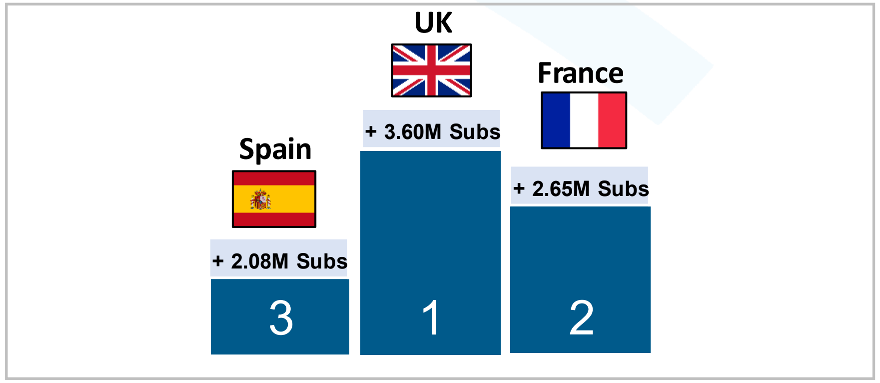
Top 3 - Main movers in terms of Homes Passed in absolute numbers

EU 39



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

EU39



Thank you for your attention!

FTTH Council Europe asbl
Rue de la Presse 4
B-1000 Brussels
Belgium
Tel: +32(0)460 97 46 97
e-mail: info@ftthcouncil.eu

www.ftthcouncil.eu

Roland Montagne
Principal Analyst
+33 (0)6 80 85 04 80
r.montagne@idate.fr

Domenico Dichiarante
Chair, Market Intelligence Committee
FTTH Council Europe
domenico.dichiarante@openfiber.it