



**FTTH** 2026  
LONDON  
CONFERENCE 14-16 APRIL

## *Panel 8*

# Two Markets, Two Paths: Fibre Lessons from Germany & Italy



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Panelists of this session:



**Matthias Büning**  
Head of Regulation & Compliance  
EWE Tel



**Susanne Ding**  
Deputy Director General  
Department Digital Infrastructure in the  
Federal Ministry for Digital Transformation



**Stefano Mazzitelli**  
Commercial Director  
Open Fiber



**Lisa Di Felicianonio**  
Chief Communication & Sustainability  
Officer  
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**Sven Müller**  
Chief Strategy & Transformation Officer  
Vodafone



**Ilsa Godlovitch -  
Moderator**  
Associate, Director Brussels  
WIK Consult



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# 1. Structural features of the Italian and the German markets

The latest figures of the FTTH/B Market Panorama IDATE 09/25 on the two countries:

	Italy	Germany
Coverage rate (HP/HH)	72%	56%
Take-up rate (HA/HP)	30%	25%
Penetration rate (HA/HH)	22%	14%

## 2. Comparison of structural features in Italy and Germany

- Italy's operators predominantly use a **wholesale only business model**, while most operators in Germany are **vertically integrated**.
- Germany's **roll-out takes place in a very fragmented fashion** by more than 200 operators, many of them local whereas the number of players is slightly smaller in Italy.
- **Copper switch off** has been announced by the SMP operator with **closure of MDF's planned in 2028** while copper NGAN services from the cabinet continue to be available. Plans approved by the NRA. **No concrete plans announced** by DT, but public debate taking momentum with consultation documents published by Digital Ministry and NRA.
- While the **ratio of single homes to multi dwelling units** is not too different (roughly 40%/60%), Germany is the only Member State where more than half of the households live as **tenant** whereas in Italy only 24% do so.
- In Italy **passive wholesale access by SMP operator** (ducts and poles as well as terminating segment) is used as well as IRUs for coinvestment projects whereas in Germany SMP operator focuses on **Layer 2 Bitstream wholesale access**.



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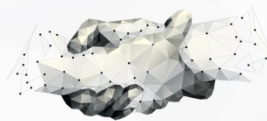
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