



VATM | 27th Telecommunications Market Analysis Germany 2026

Where do we stand in Germany today on fiber?

Selected findings on fibre rollout, take-up, investment and competition

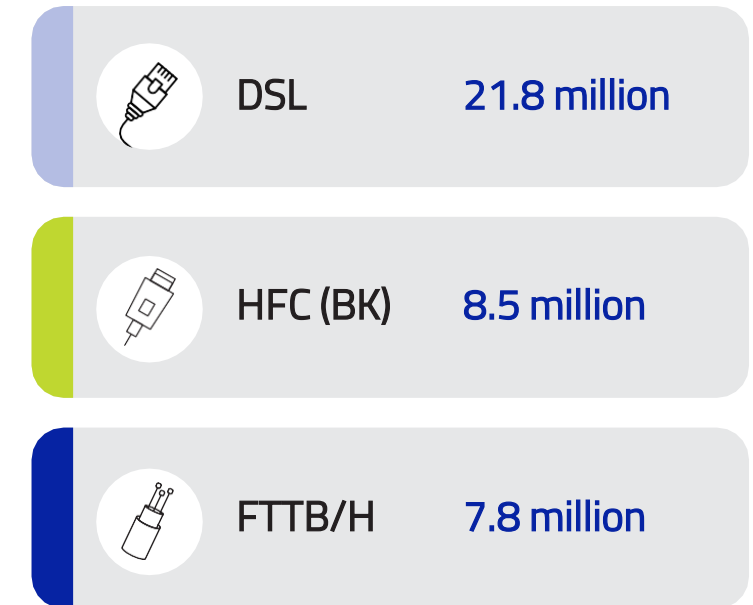
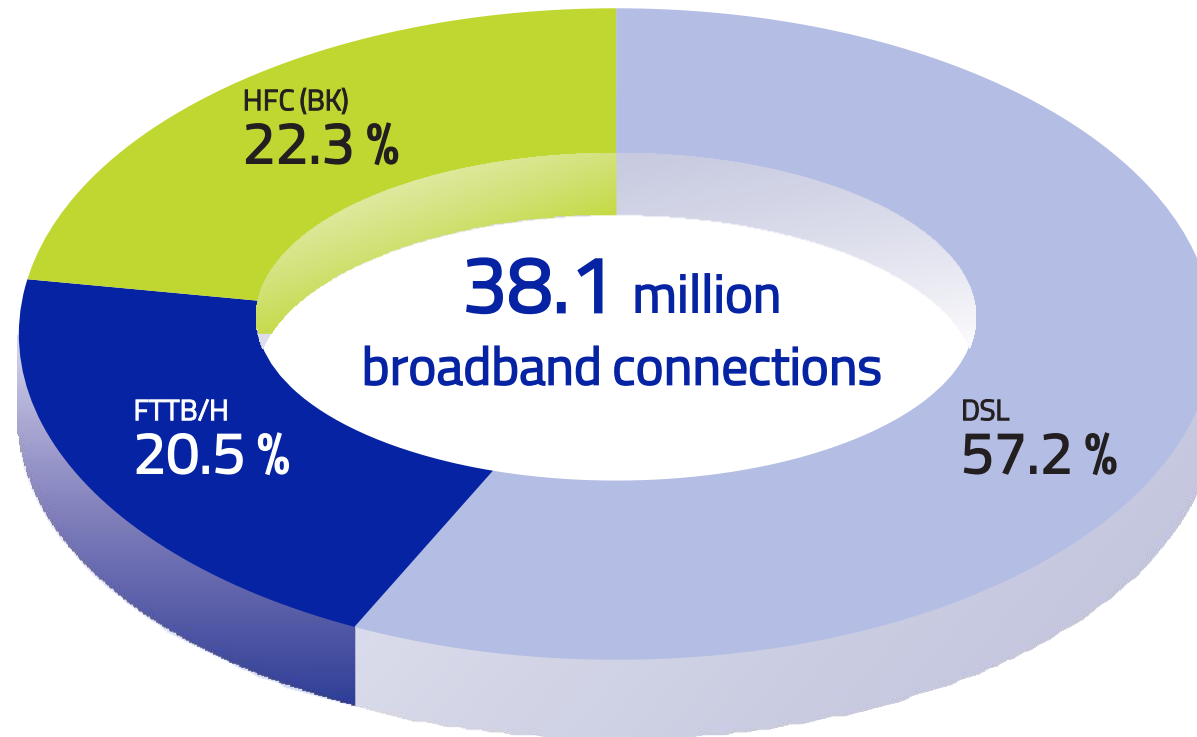
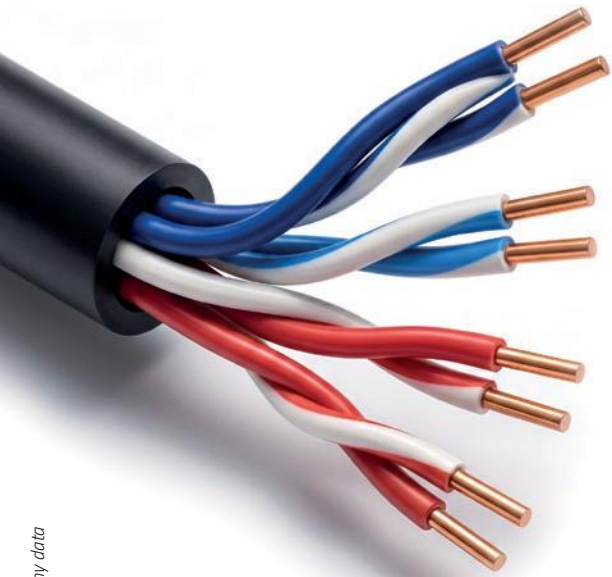
Frederic Ufer | VATM

Oslo | 16 September 2026

Competition drives Germany's fibre transition.

Telekom DSL continues to dominate the market – fibre is rapidly catching up

Spotlight 2: Activated Broadband Connections^a (Homes Activated) by Technology
(Estimate for end of 2026)



a) Excluding standalone telephony and broadcast television connections. Excluding access types such as 5G fixed wireless, broadband wireless access (BWA), leased lines, LTE fixed wireless, powerline communications, or satellite.

1.4 million new fibre customers in 12 months – almost a quarter of addressable households are also using fibre

Spotlight 3: Homes Passed, Connected and Active on Fibre Networks
(Estimate for end of 2026; previous-year figures shown in square brackets)

Homes Passed (HP)

[26.6 million]
32.0 million

Addressable
households/SMEs



Homes Connected (HC)

[10.5 million]
12.5 million

Fibre connections
(39.1% of HP)



Homes Activated (HA)

[6.4 million]
7.8 million

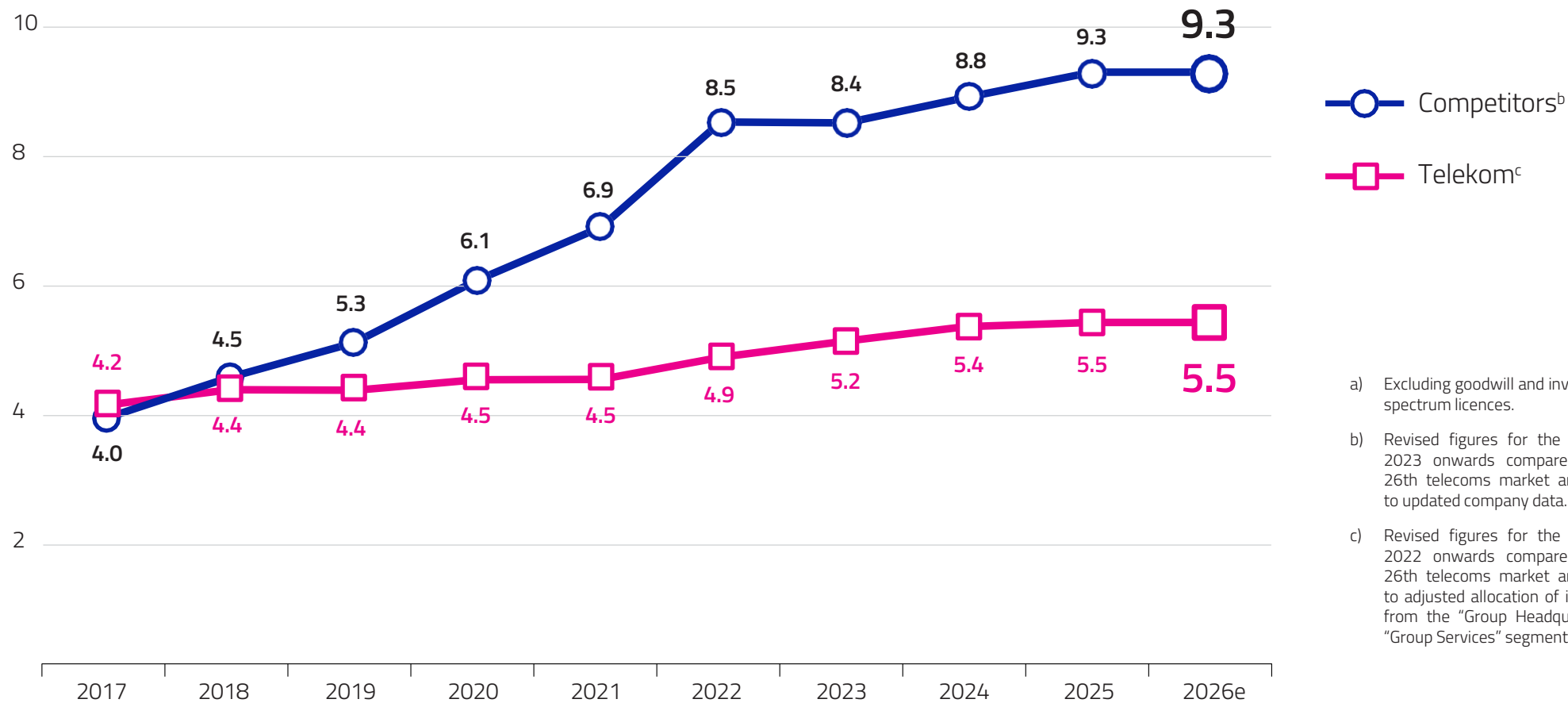
Active fibre connections
(take-up rate: 24.4%)



Source: company data

Competitors continue to invest significantly more than Deutsche Telekom, with spending reaching €9.3 billion

Fig. 7: Investment in Telecommunications Fixed Assets^a
(in billions of EUR)



Investment ratio

24.8 %

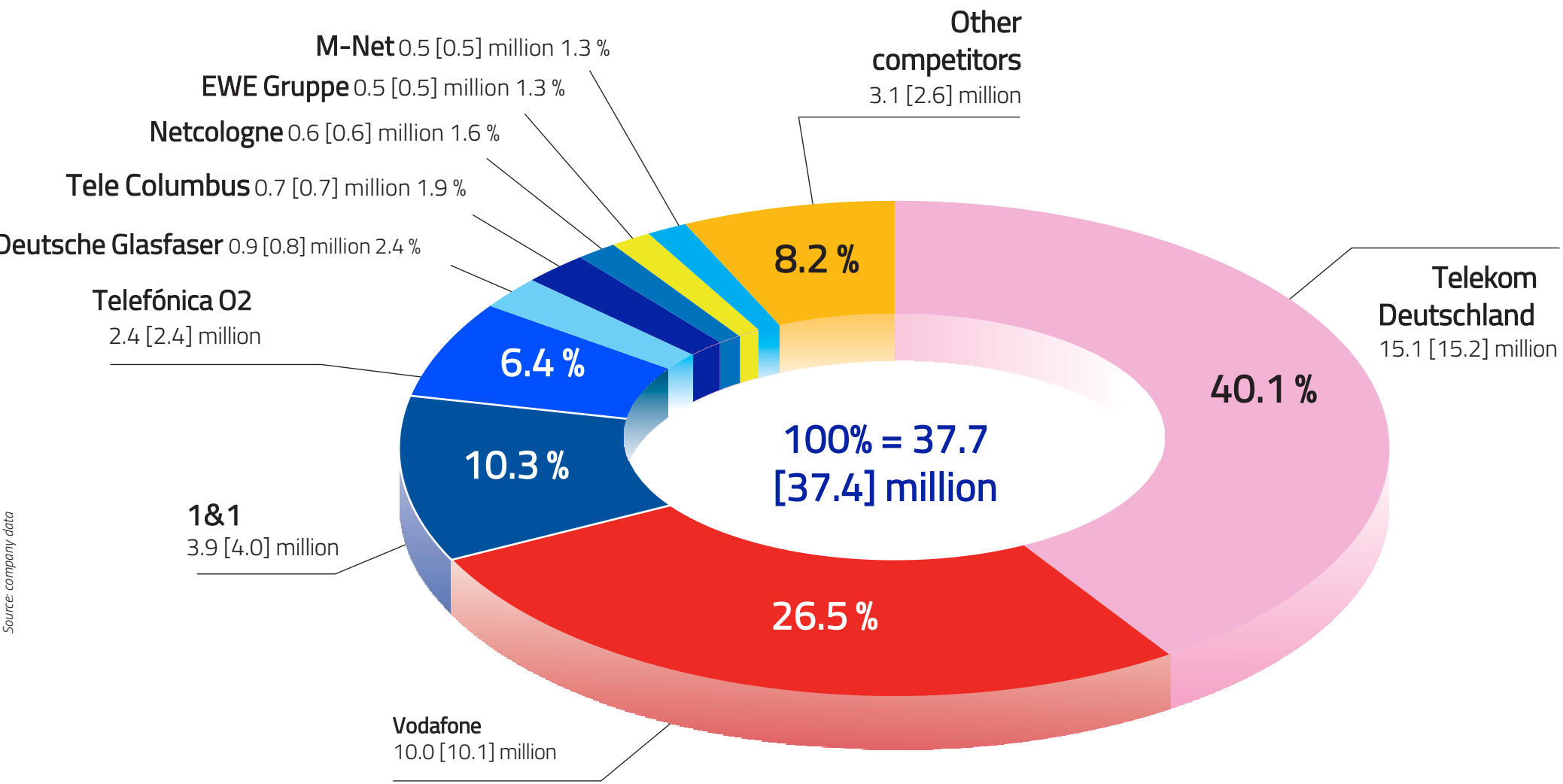
Comparative figures from other industries (2024)

	Construction industry	3.6 %
	Automotive industry	8.1 %
	Chemical and pharmaceutical industry	11.6 %

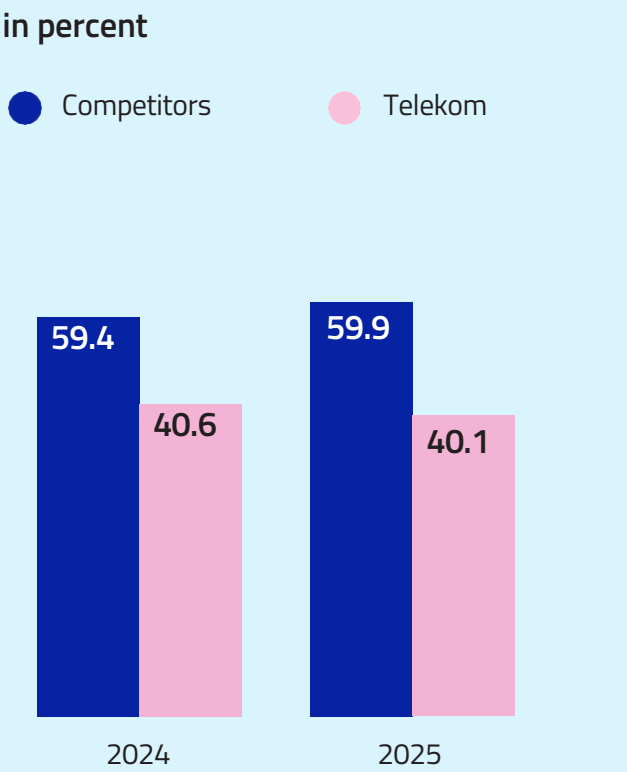
- a) Excluding goodwill and investments in spectrum licences.
- b) Revised figures for the years from 2023 onwards compared with the 26th telecoms market analysis, due to updated company data.
- c) Revised figures for the years from 2022 onwards compared with the 26th telecoms market analysis, due to adjusted allocation of investments from the "Group Headquarters" and "Group Services" segments.

At the end of 2025, Telekom retained a retail customer market share of over 40 % – The three largest competitors combined accounted for a 43.2 % share of the market

Fig. 8: Active Broadband Connections^a by Operator
(Status: 31.12.2025)



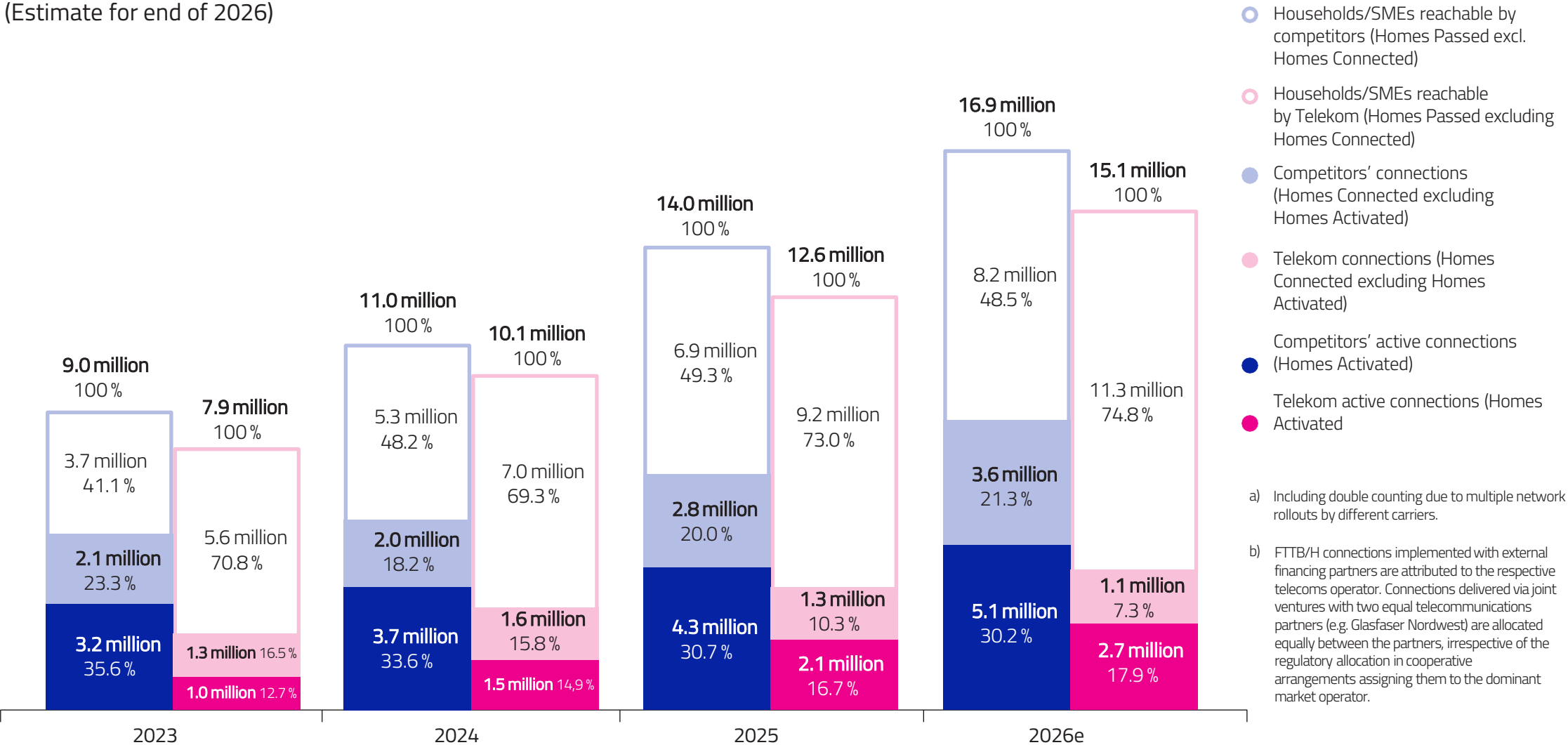
Retail customer market shares



a) Excluding standalone fixed-line telephony and broadcast TV connections. Also excluding access types such as 4G/5G fixed wireless access, broadband wireless access (BWA), leased lines, powerline, and satellite. Actual figures as at 31 December 2025; figures in square brackets show actual values as at 31 December 2024.

65.4 % of fibre customers are with competing providers – Telekom continues to focus primarily on Homes Passed

Fig. 15: Fibre households: Passed^a, connected and active^b by operator
(Estimate for end of 2026)



Take-up-Rate

Active connections
(Homes Activated)
2026e

30.2 %

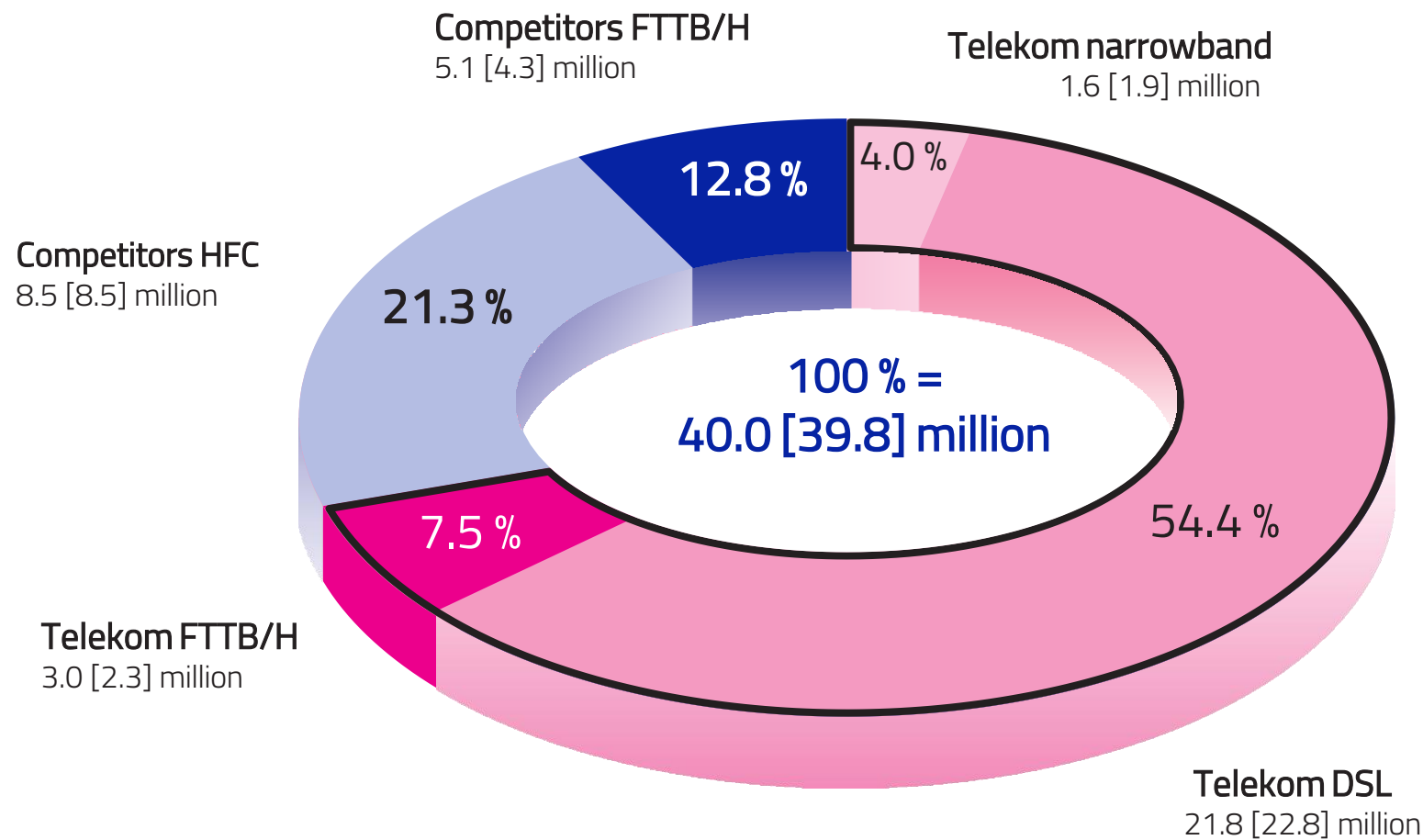
Competitors

17.9 %

Telekom

Telekom dominates the access market – therefore an effective regulation by the Federal Network Agency (BNetzA) is of a big importance

Fig. 17: Narrowband and broadband connections in active use^a by line ownership
(Estimate for end of 2026)



Shaded area = 65.9 %

- Predominantly fully depreciated copper twin-core lines
- 26.4 million actively used access lines owned by Telekom
- Telekom generates revenue from 26.4 million access lines, either directly from retail customers or via wholesale services.

a) Excluding pure broadcast TV connections. Excluding access types such as 5G fixed wireless access, BWA, leased lines, LTE fixed wireless, powerline or satellite. Estimate for end-2026, with actual values in square brackets for end-2025.

b) Including Telekom wholesale.



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German-Austrian-Norwegian Telecom Exchange Summit 2026

Want the full picture?

The complete English-language edition of the 27th Telecommunications Market Analysis Germany 2026 is available on the VATM website.

Full market analysis, figures and charts:

www.vatm.de/marktstudien/



Scan for the full analysis

Thank you for your attention.

Competition drives Germany's fibre transition.