

The Austrian Market where to move

Oslo 16.9.2026

Who is ofaa?



- OFAA established in 2021
- Association with > 240 members representing all wholesale-only and many open access projects in Austria
- Providing a neutral and independent platform for establishing common technical standards
- Issuer of the Open Access ID
- Main goal is to accelerate the wide-area roll-out of FTTH networks based on the wholesale-only business model in Austria
- Organiser of the Austrian Fiber Summit (biggest FTTH conference)

We make it happen



Martin Wachutka
Präsident



Philipp Machac
Vizepräsident



Irmgard Kollmann
Geschäftsführerin



Marco Resch
Vizepräsident

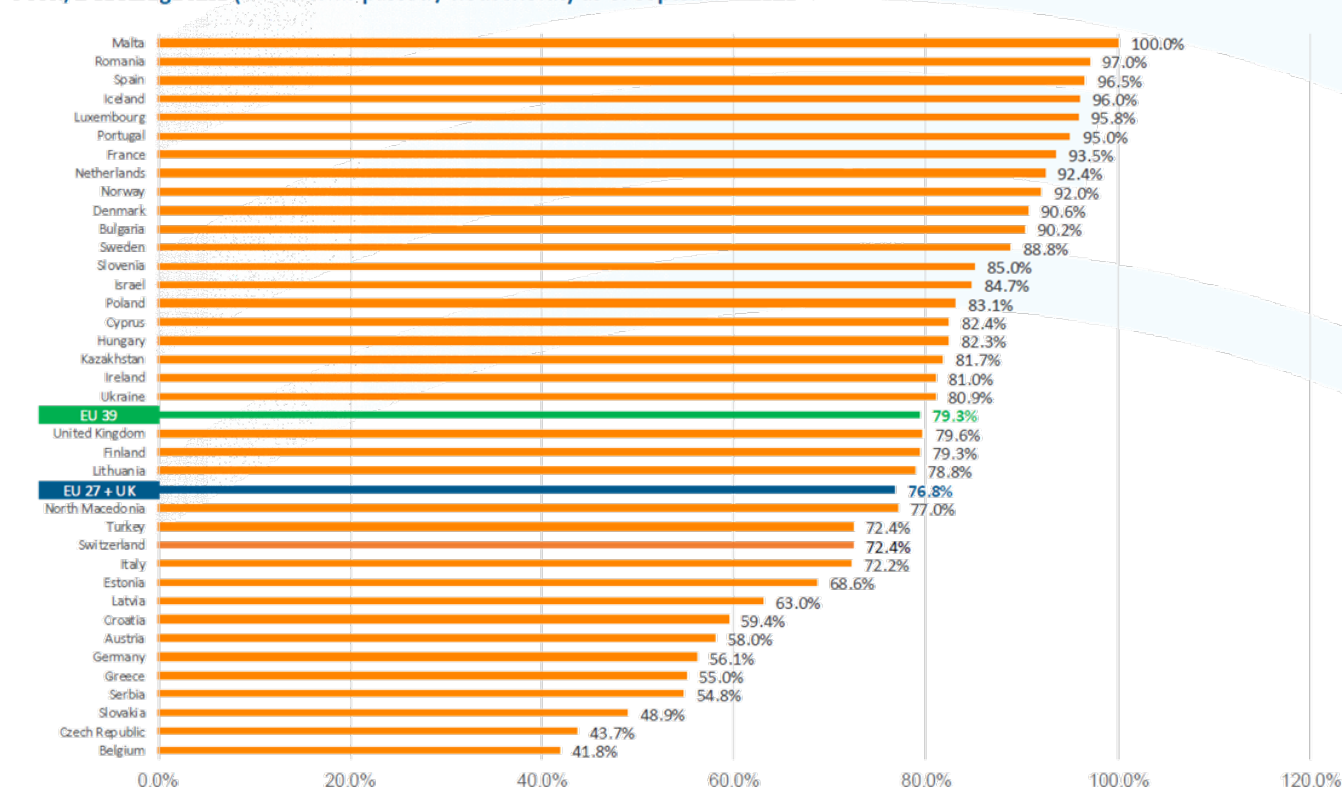


Herbert Flatscher
Vorsitzender des Beirats

Austria Compared

FTTH Coverage rate

FTTH/B coverage rate (households passed / households) as of September 2025

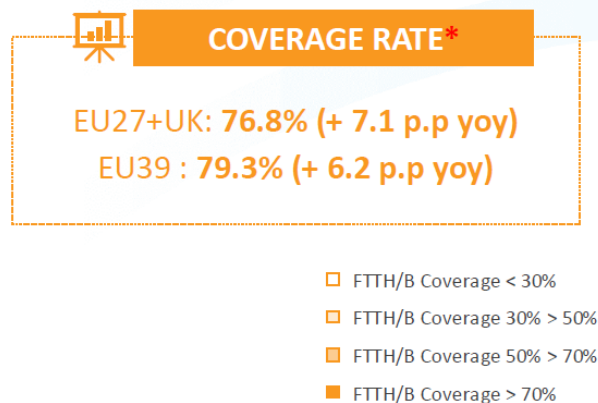


- FTTH/B coverage reflects diverse national deployment trajectories across EU39, shaped by geography, market structure and policy choices.
- A growing number of countries now exceed the 75–80% coverage threshold, pulling the European average upward.
- High-coverage markets are nearing a practical deployment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

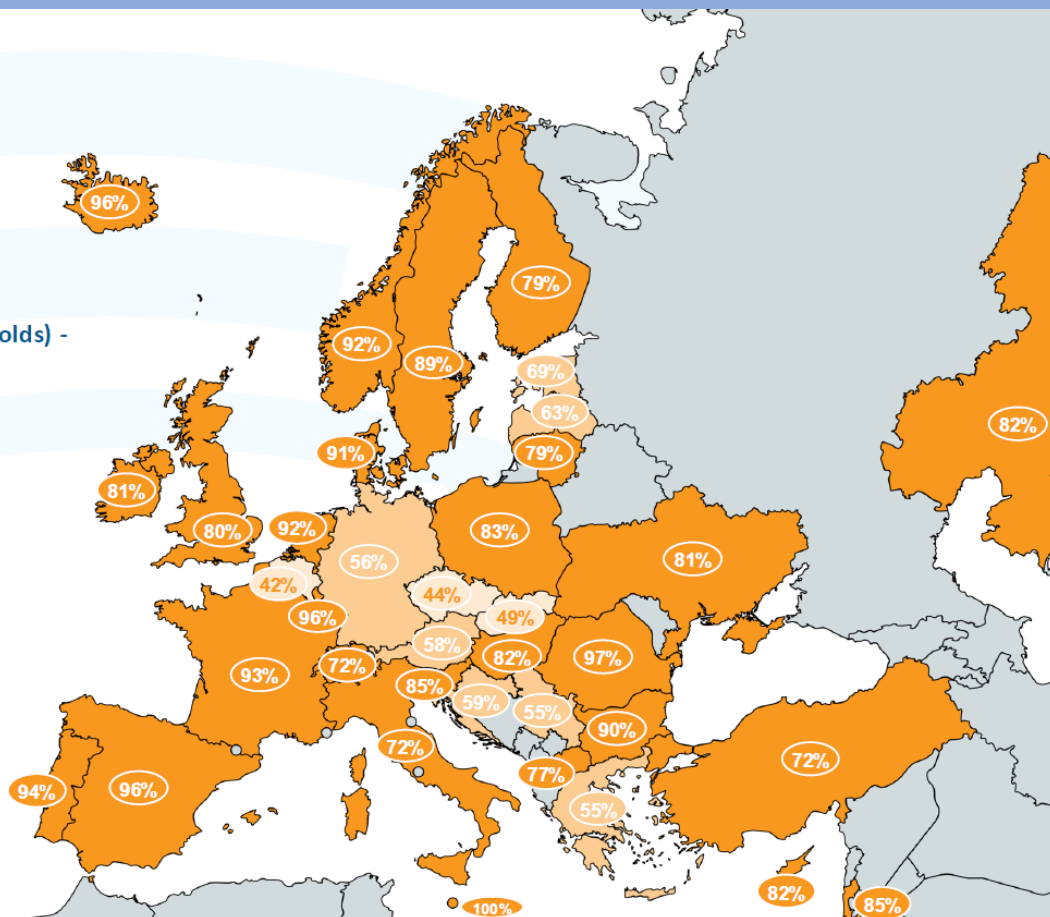
FTTH Coverage rate

FTTH/B Coverage rate Summary map

FTTH/B coverage rate map (households passed / households) -
September 2025

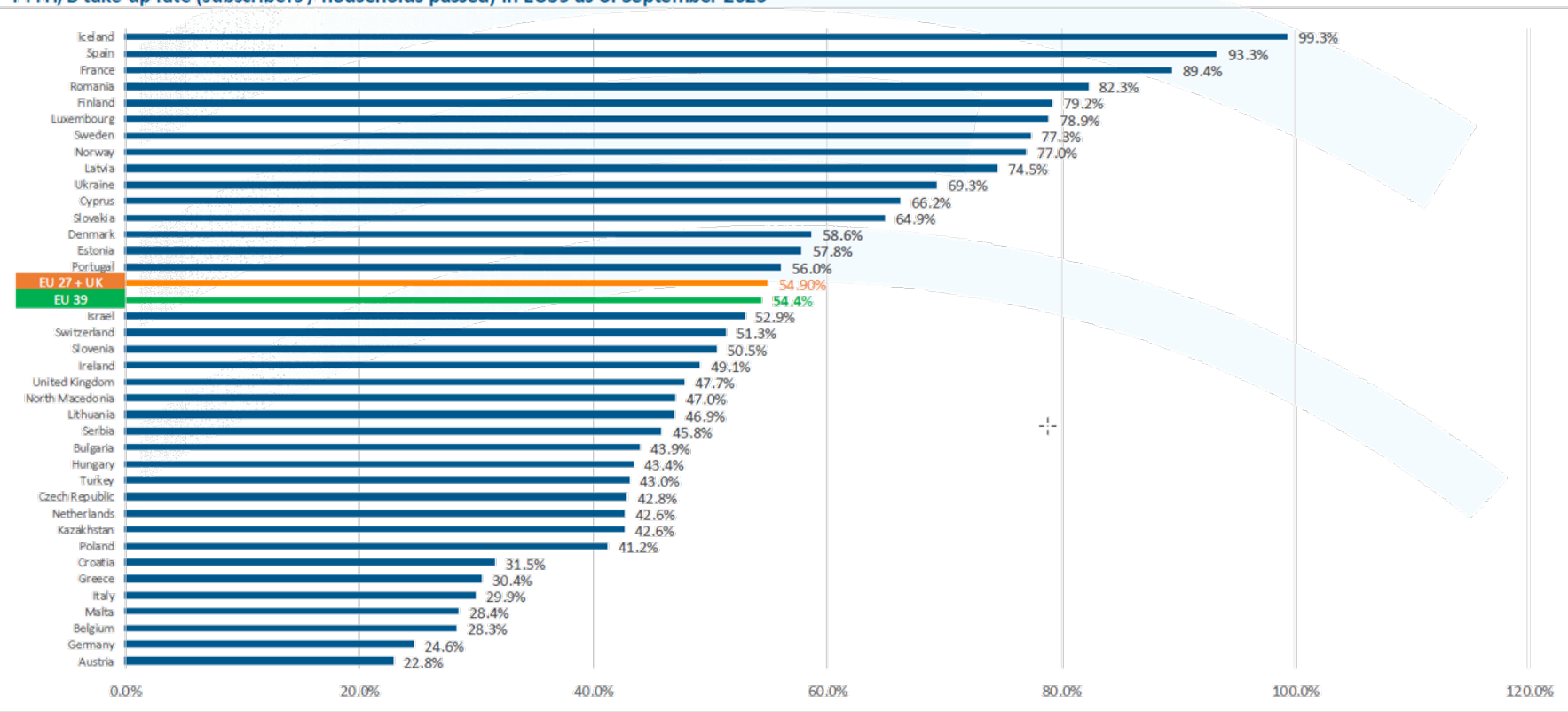


(*) : The household base in certain countries has been revised following discussions with key stakeholders. This update affects the calculation of various rates as well as historical data.



FTTH Take-up rate

FTTH/B take-up rate (subscribers / households passed) in EU39 as of September 2025



FTTH Take-up rate

Take-up rate, European leaderboards

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

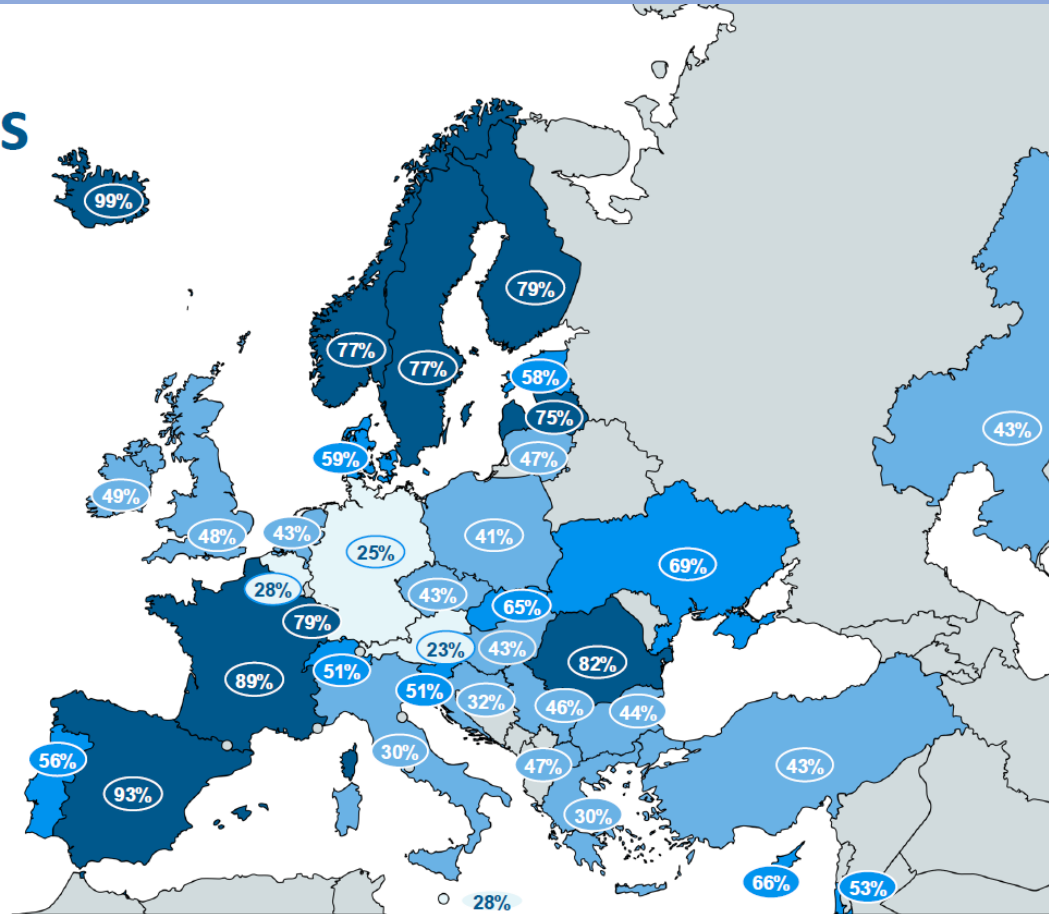


TAKE-UP RATE*

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%

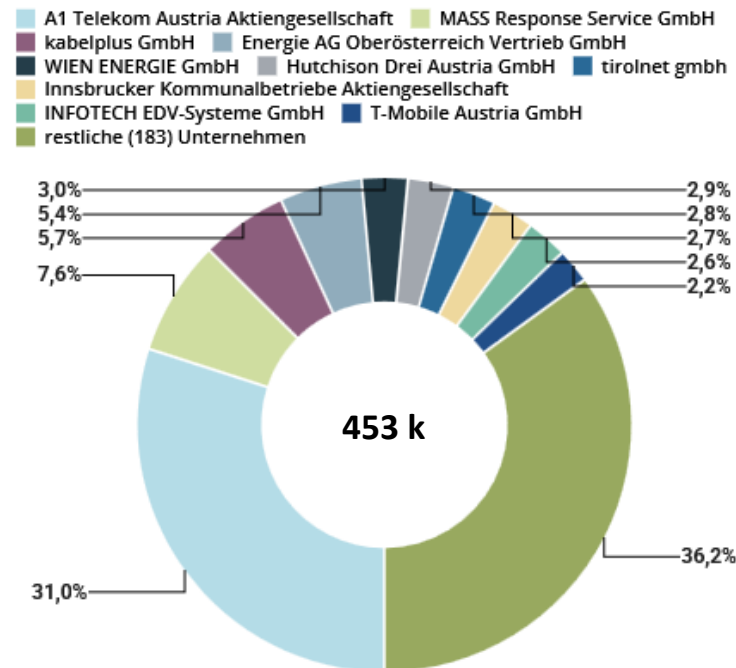
(*) : The household base in certain countries has been revised following discussions with key stakeholders. This update affects the calculation of various rates as well as historical data.



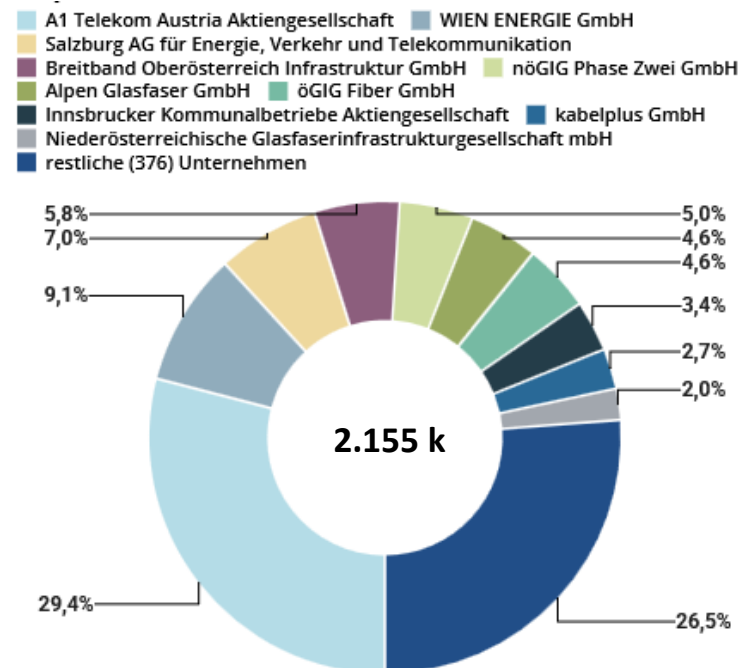
Austrian Fixed Broadband Market

FTTH-Market in Austria

„Premisses-Activated“



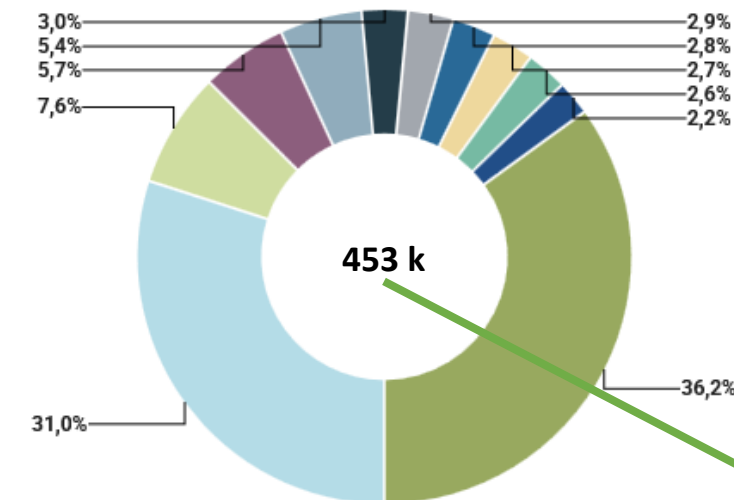
„Premisses-Passed“



FTTH-Market in Austria

„Premisses-Activated“

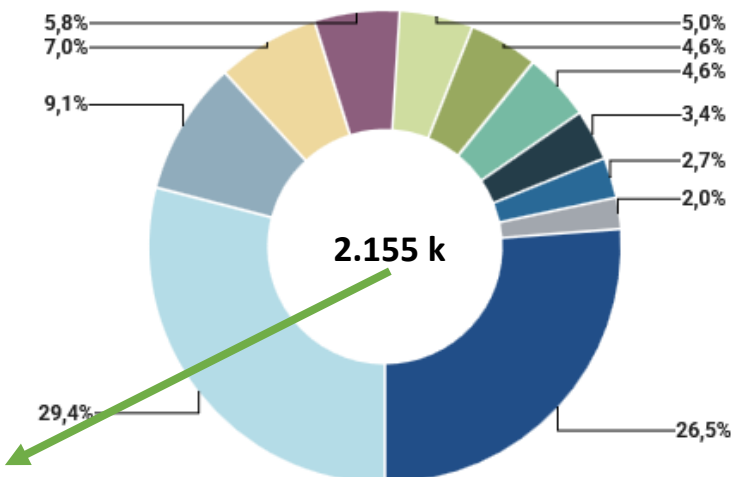
A1 Telekom Austria Aktiengesellschaft
kabelplus GmbH
WIEN ENERGIE GmbH
Innsbrucker Kommunalbetriebe Aktiengesellschaft
INFOTECH EDV-Systeme GmbH
restliche (183) Unternehmen
MASS Response Service GmbH
Energie AG Oberösterreich Vertrieb GmbH
Hutchison Drei Austria GmbH
tirolnet gmbh
T-Mobile Austria GmbH



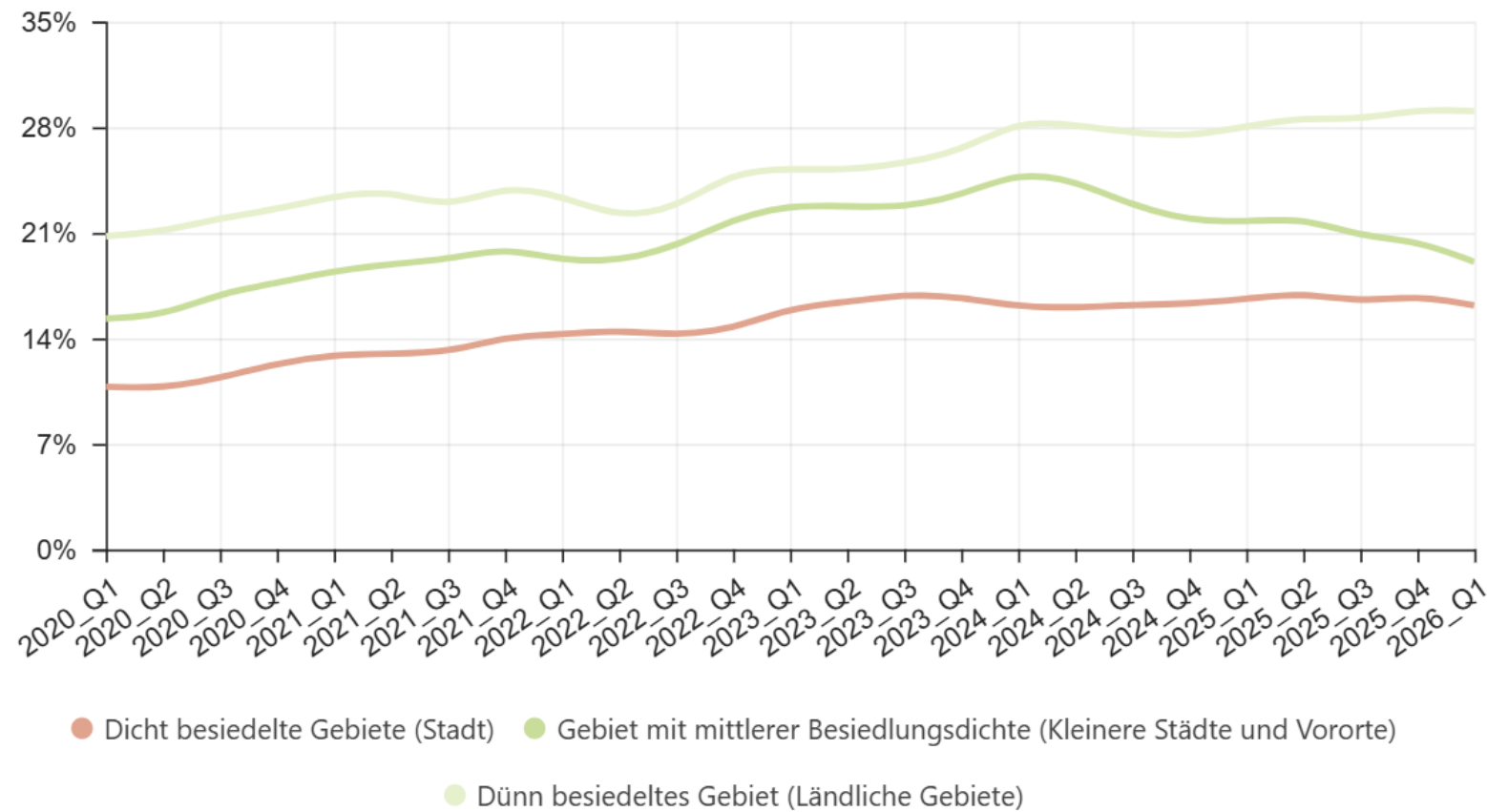
Avg. 21 %

„Premisses-Passed“

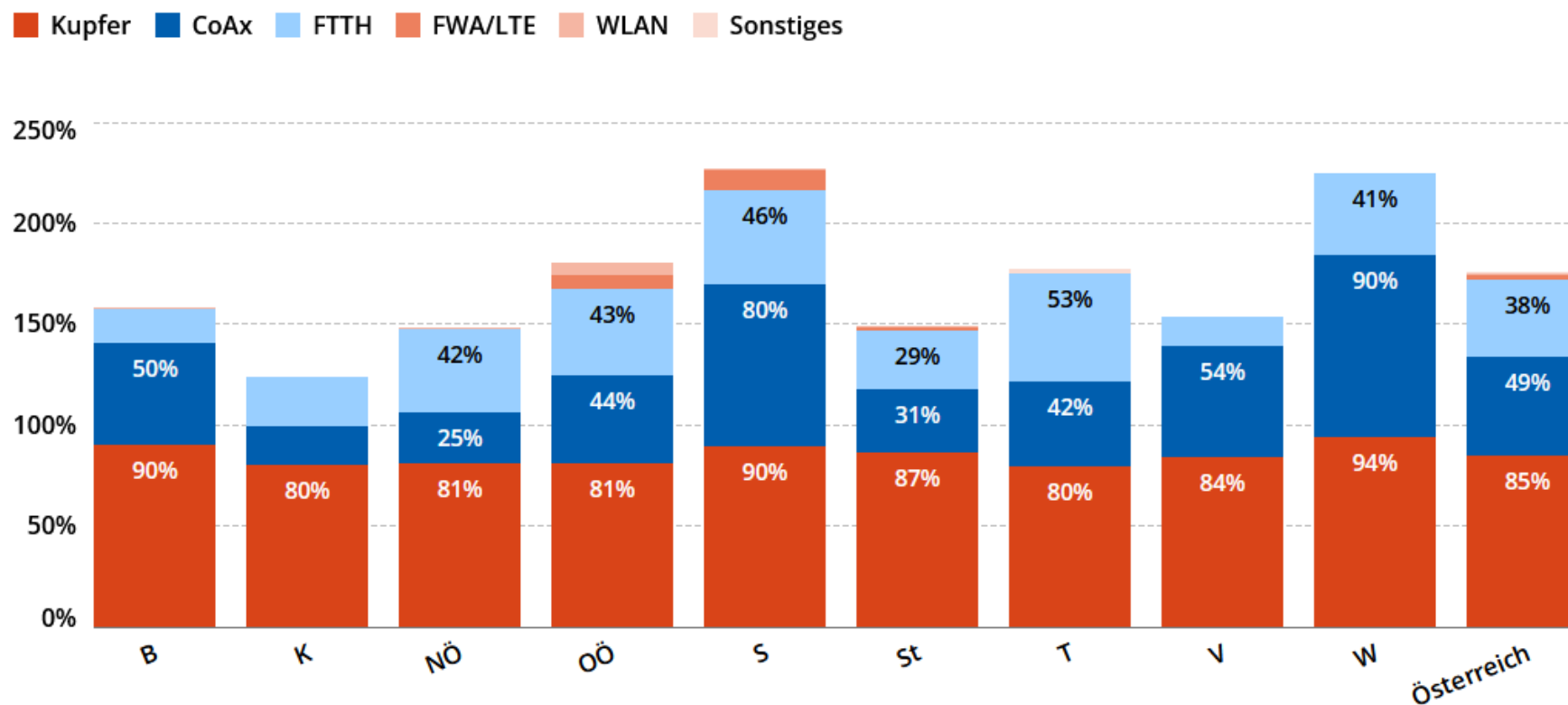
A1 Telekom Austria Aktiengesellschaft
Salzburg AG für Energie, Verkehr und Telekommunikation
Breitband Oberösterreich Infrastruktur GmbH
Alpen Glasfaser GmbH
Innsbrucker Kommunalbetriebe Aktiengesellschaft
Niederösterreichische Glasfaserinfrastrukturgesellschaft mbH
restliche (376) Unternehmen
WIEN ENERGIE GmbH
nōGIG Phase Zwei GmbH
öGIG Fiber GmbH
kabelplus GmbH



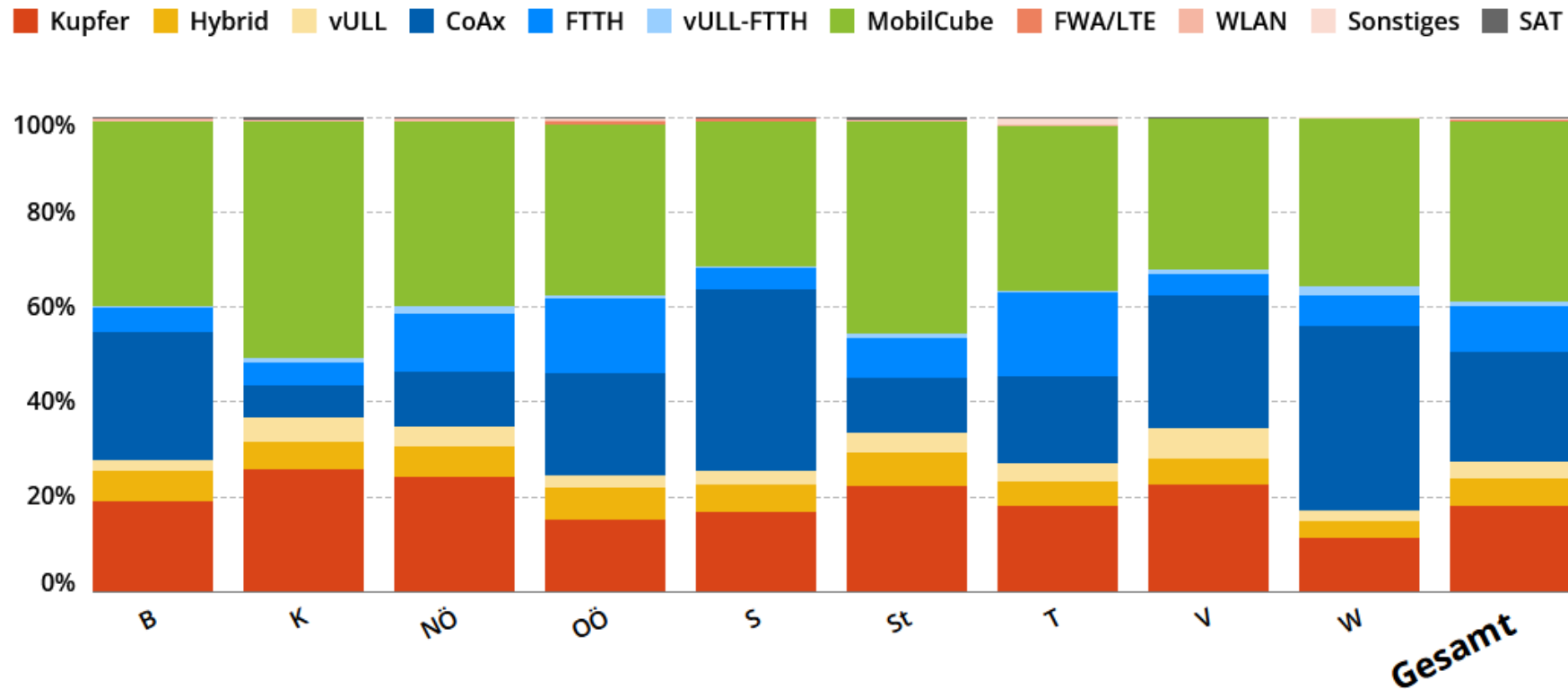
Takeup Rate FTTH per DEGURBA



Offered Technologies

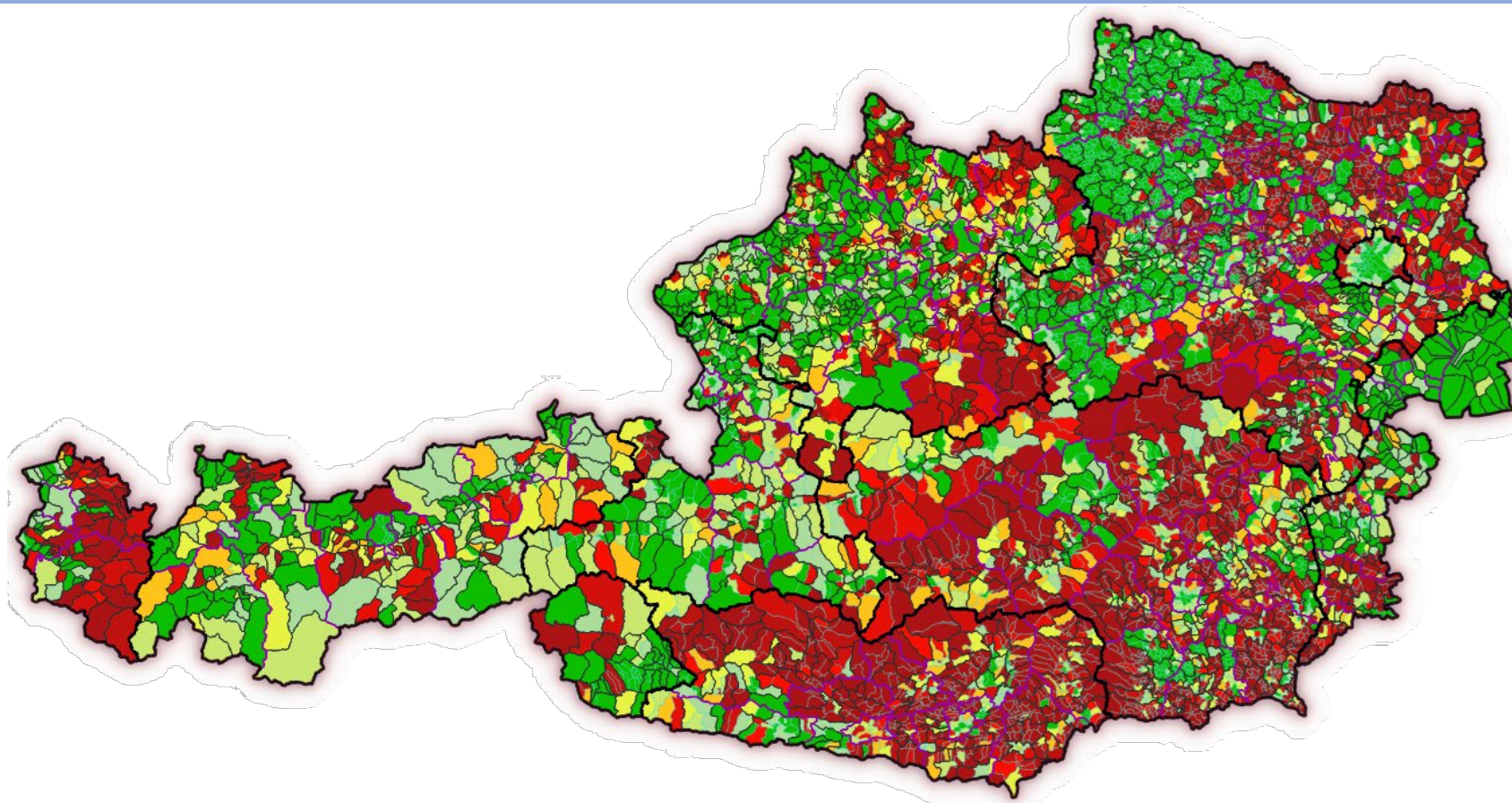
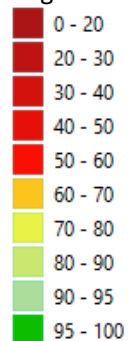


By Customers Used Technology

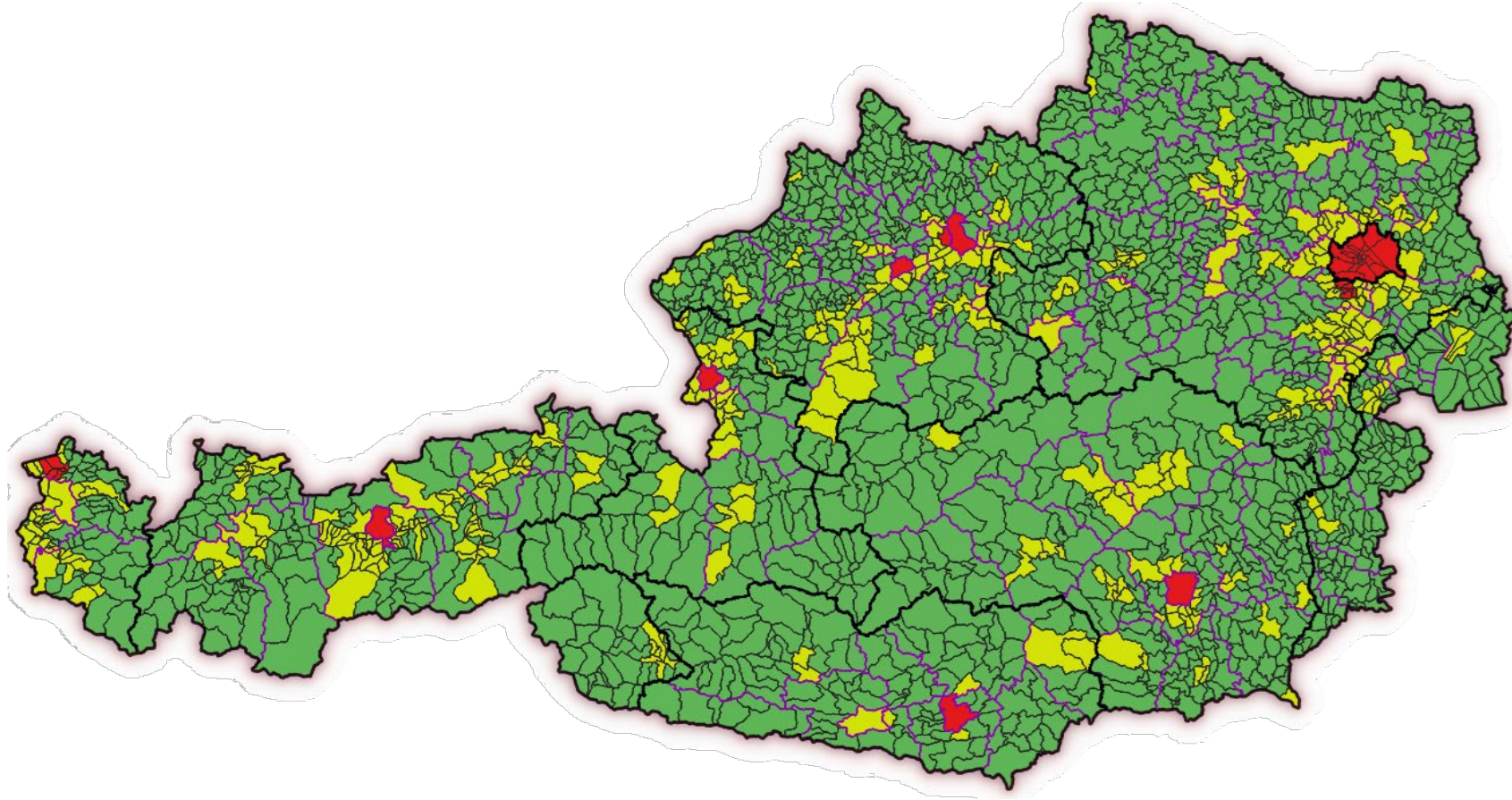


Grade of VHCN coverage (q1/26)

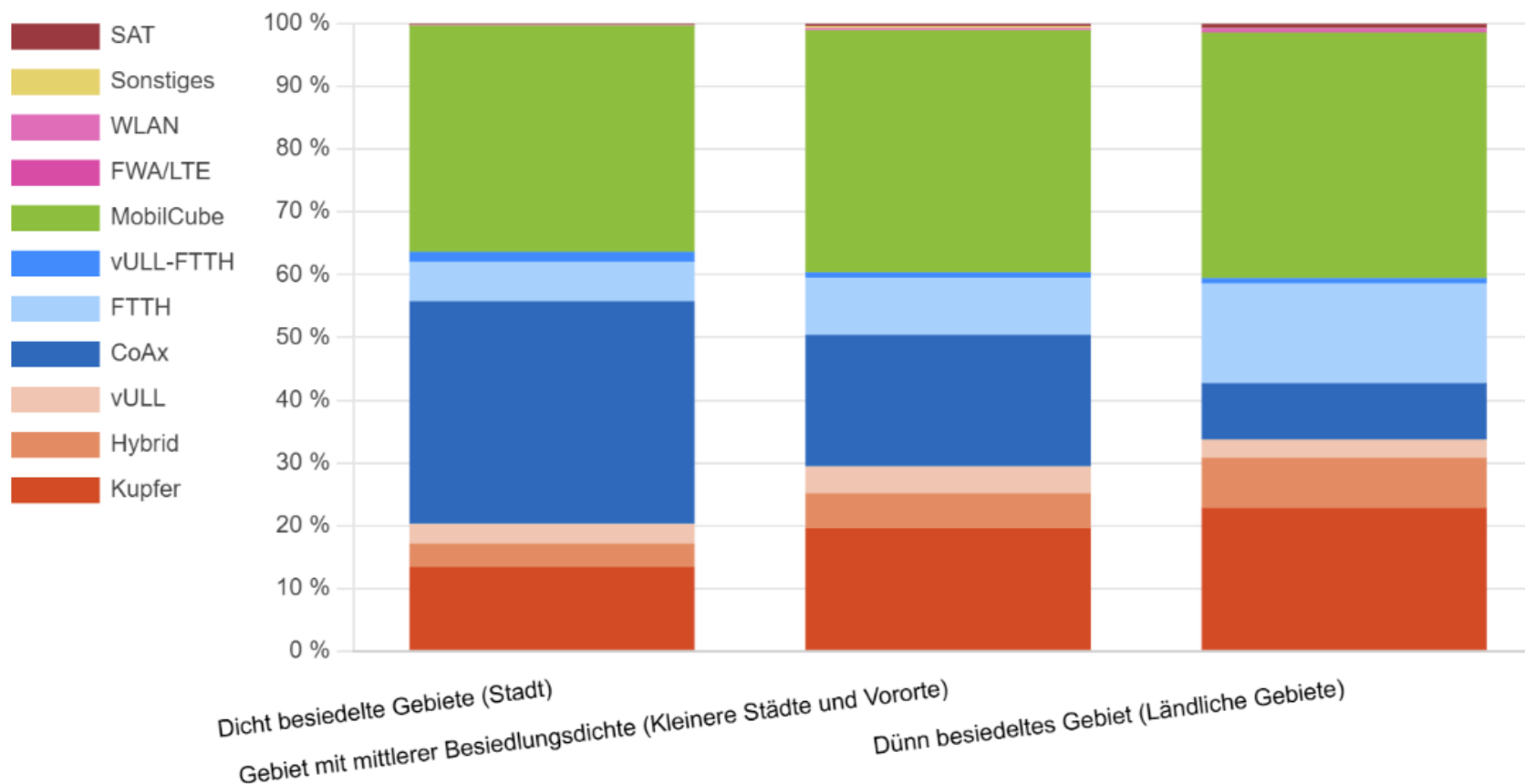
Reg. Coverage [%]



Degree of Urbanisation



By Customers Used Technology and Degree of Urbanisation



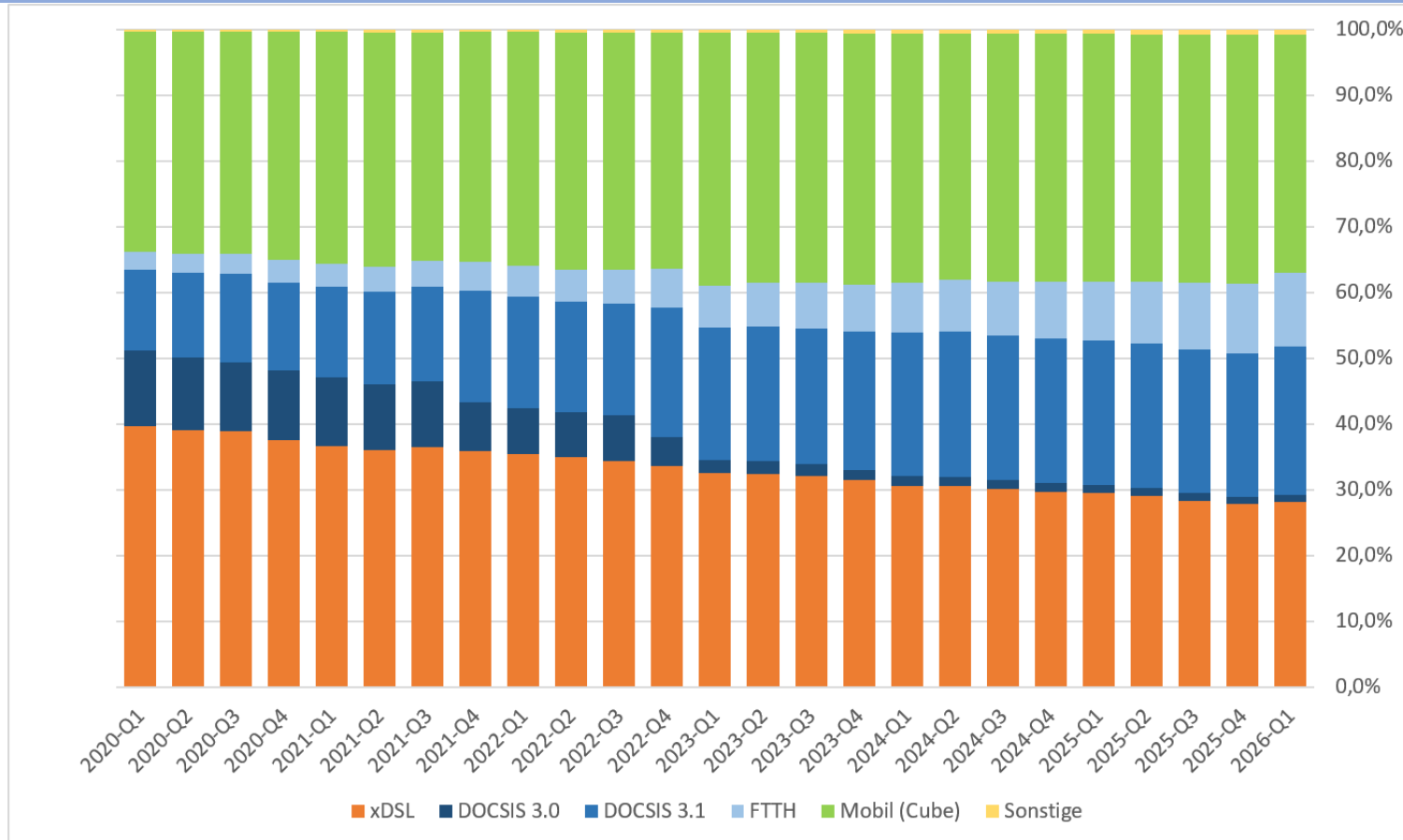
Conclusions on Austrian market

- Fibre roll-out kicked in relatively late due to good copper network and substantial investment into “Access Remote Units”
- The internet access market for consumer is „mobile cube“ driven
- Urban and sub-urban areas have comparably good cable-TV network coverage
- Rural areas (fostered by a focused subsidy schema) have seen a strong fibre development in both availability and substantial take-up rates, respectively. Many of these networks are open access.
- Many

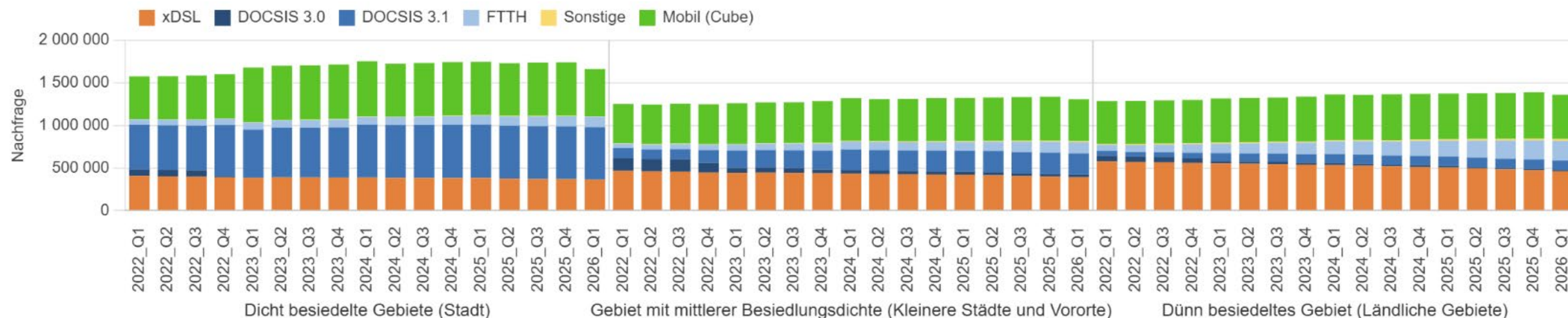
A scenic view from a wooden balcony. In the foreground, there are large coils of orange corrugated pipes. A few colorful pipes (yellow, blue, red, white) are visible among them. In the upper center, a tree branch with green leaves and small white flowers hangs over the view. The background shows a green field, a small town, and distant hills under a clear blue sky.

Thank you for your attention

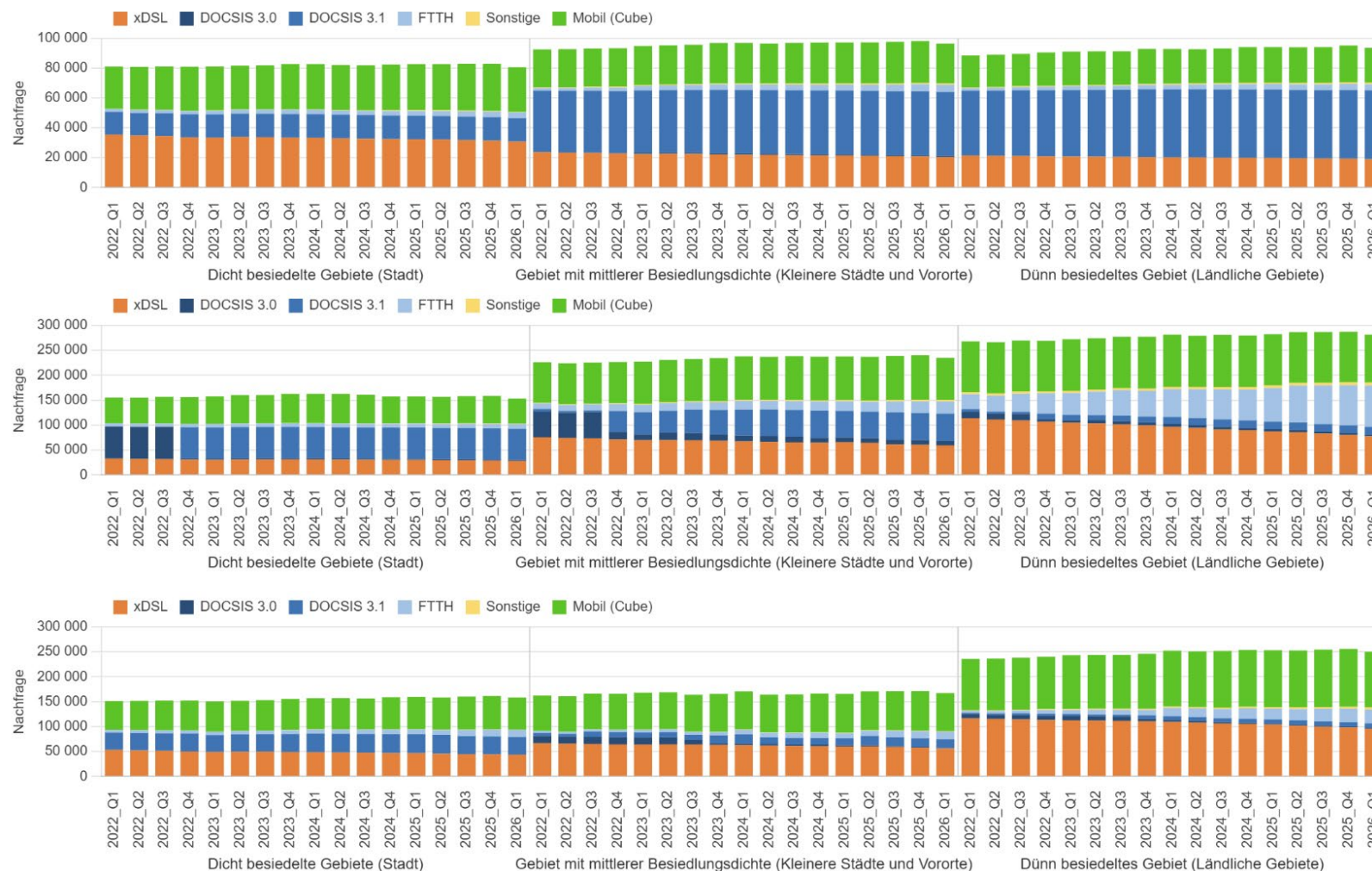
By Customers Used Technology over Time



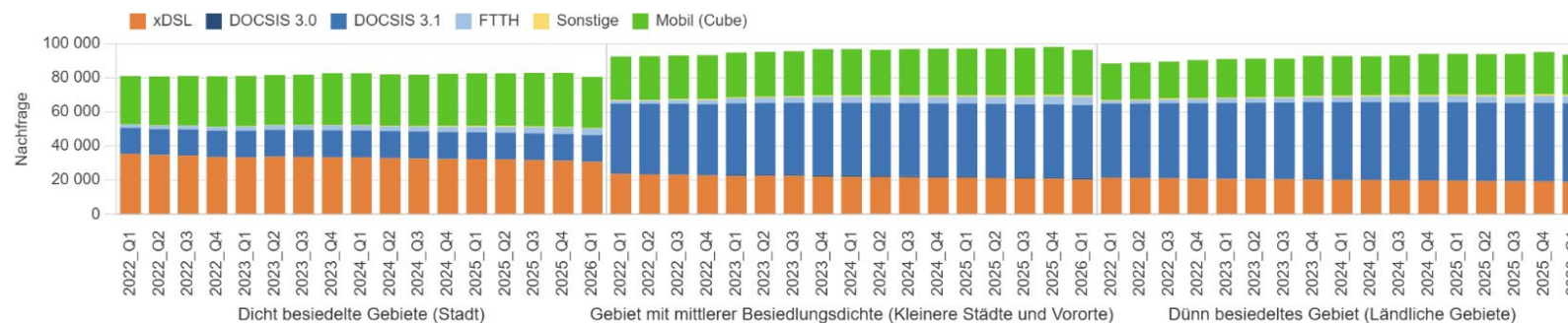
User Choices Austria (DEGURBA)



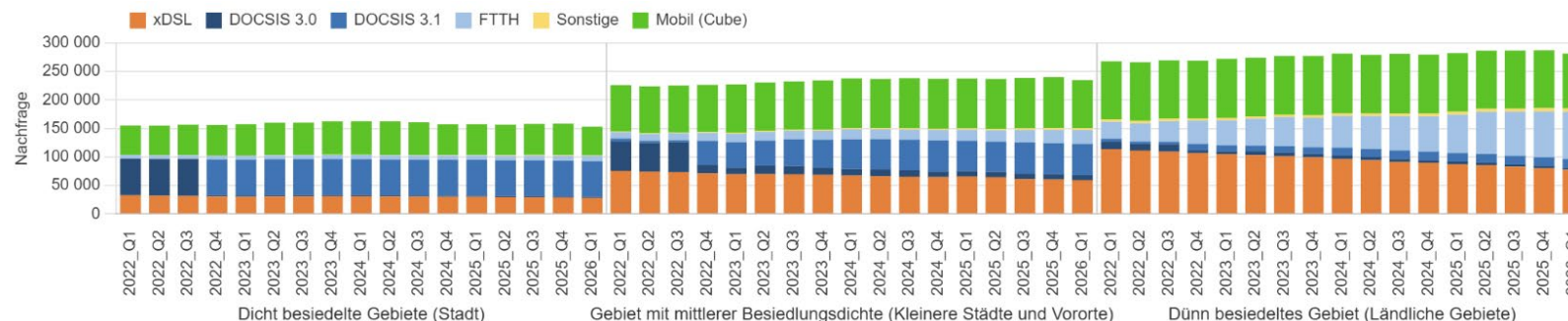
Salzburg – Oberösterreich – Steiermark



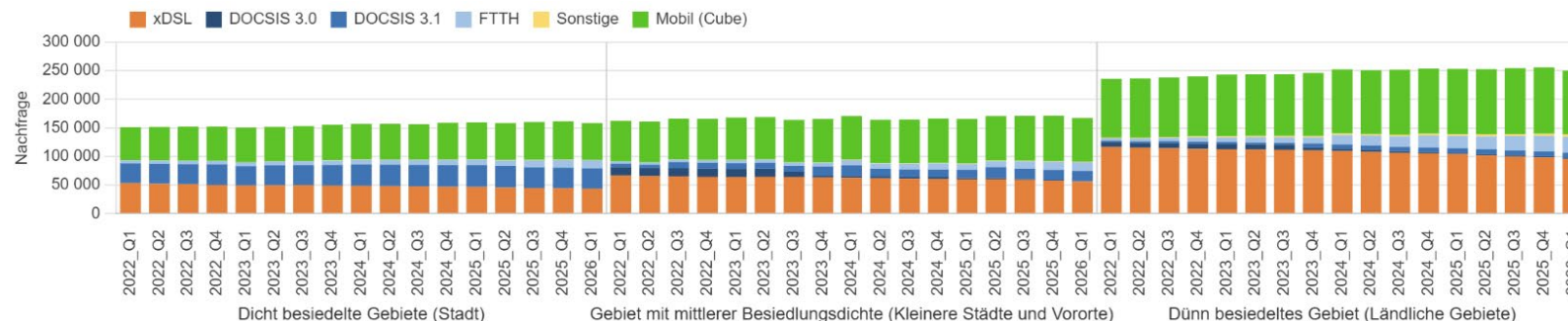
Salzburg – Oberösterreich – Steiermark



Salzburg

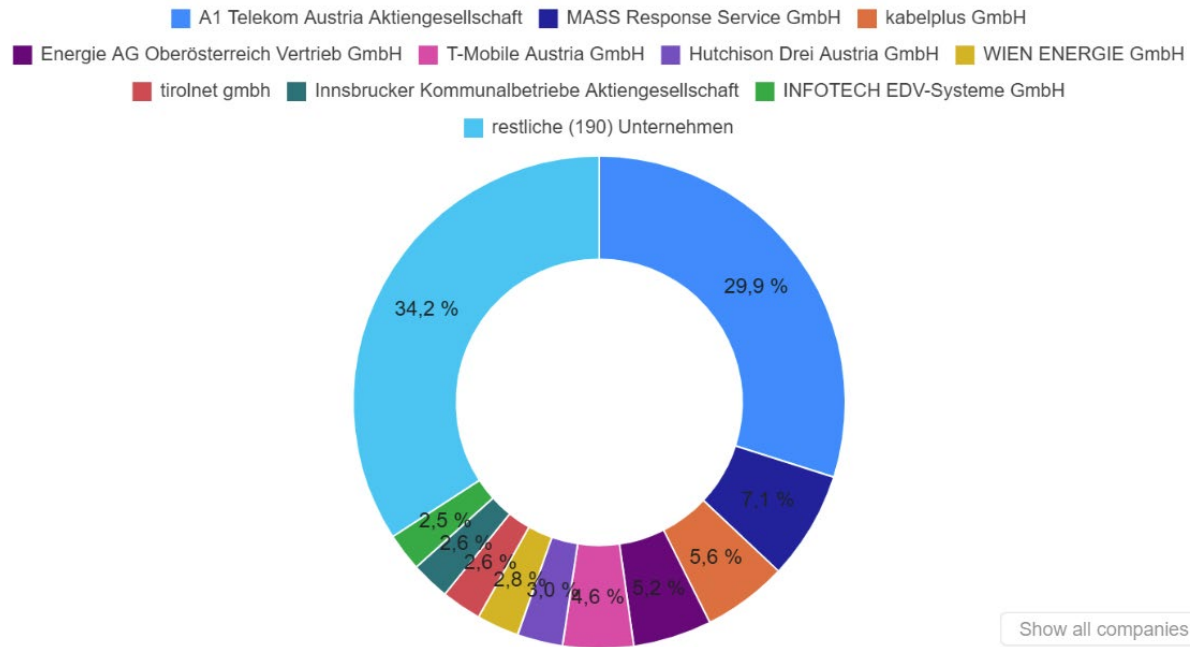


Oberösterreich

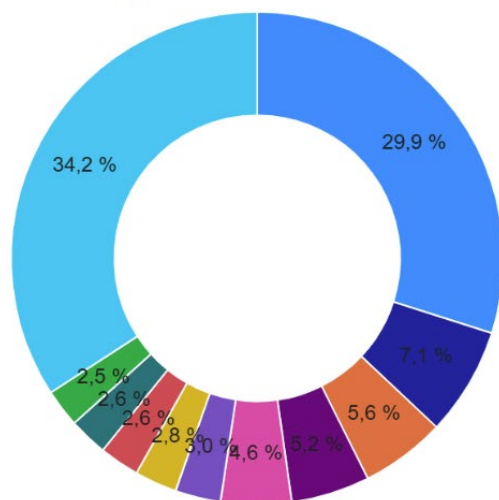


Steiermark

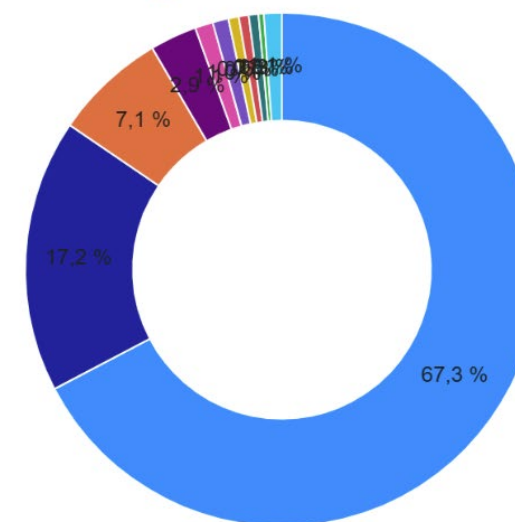
FTTH-Market Shares Austria



FTTH-Market Shares Salzburg

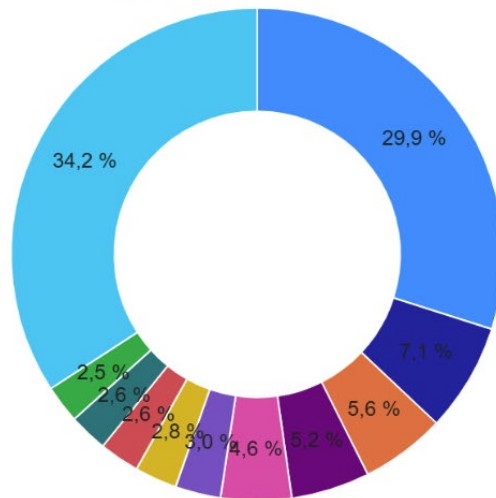


Show all companies

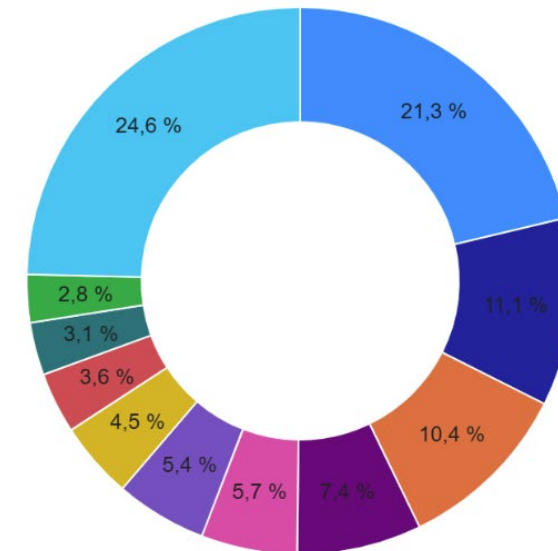
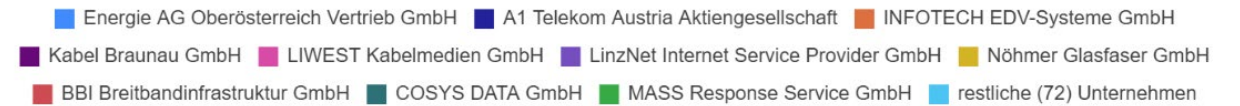


Show all companies

FTTH-Market Shares OÖ

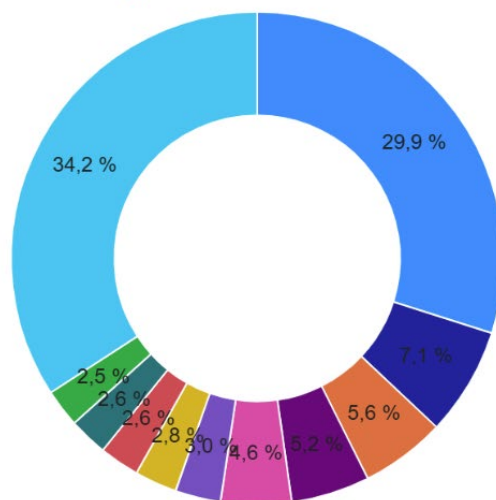


Show all companies

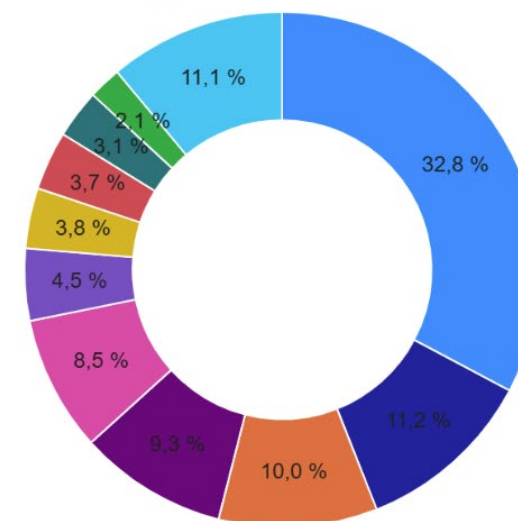


Show all companies

FTTH-Market Shares Stmk

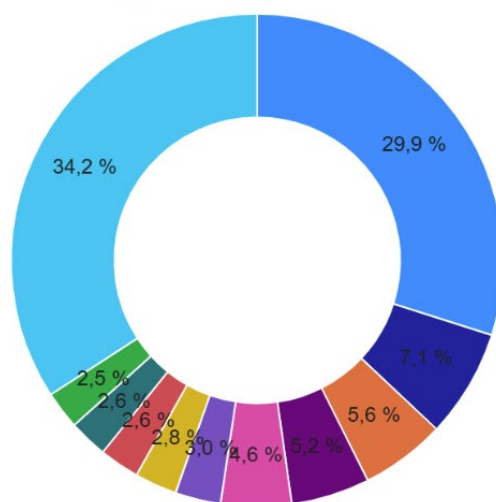


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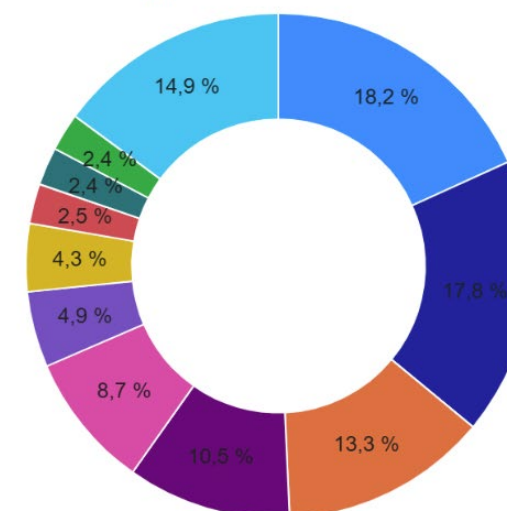


Show all companies

FTTH-Market Shares Tirol



Show all companies



Show all companies

Backup

How does an OAID look like?

