

Fibre for SMEs

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Abstracts

As residential FTTH markets across Europe mature, operators face slowing growth and diminishing returns on further household expansion. At the same time, SMEs remain significantly underserved: their fibre coverage lags residential by 20–40 points, and most operate below the performance thresholds required for cloud, cybersecurity and hybrid work.

This report examines how SME-focused fibre deployment can unlock the next wave of growth in saturated markets. By analysing demand drivers, deployment architectures, commercial corridors, and ROI patterns, it identifies where operators can generate superior returns through targeted fibre expansion, service-led monetisation and redesigned SME go-to-market models.

SME fibre is not simply an extension of FTTH, it is a distinct strategic opportunity requiring dedicated planning, differentiated architectures and new commercial approaches.

Key questions:

Where are the best SME fibre opportunities in saturated FTTH markets?

How big is the SME connectivity gap and why does it matter?

Which fibre architectures are most suitable for SMEs (FTTH business vs FTTO)?

How can operators prioritise SME areas to maximise ROI?

What services can be bundled with fibre to increase revenue from SMEs?

What operational changes are needed to connect SMEs more efficiently?

How can operators capture the full SME fibre growth potential by 2030?

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