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27th Telecommunications Market Analysis Germany 2026

Results of a survey of VATM member companies in the first quarter of 2026

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- Figures in square brackets indicate the corresponding values for the previous year.
- Figures shown between the columns indicate the segment's annual growth rate.

The 27th Telecommunications Market Analysis Germany 2026 examines the german telecommunications market in the context of effective competition

The analysis is based on an evaluation of the following sources:

- Written survey of VATM member companies and other telecommunications network operators conducted in February and March 2026
- Company publications, financial reports and press releases
- Publicly available studies (e.g., FTTH Council Europe, BMDS, Federal Network Agency)
- Press articles and expert interviews



Author of the Study

Dipl. Wirtsch.-Ing. Andreas Walter

- Managing Partner, Dialog Consult GmbH
- 30 years of professional experience in strategic and regulatory economic issues within the telecommunications sector
- Lecturer at RheinMain University of Applied Sciences

VATM – Competition Connects

For 28 years, VATM has been the voice of competition, innovation, modern networks and digitalisation. As a major industry association, we play a key role in shaping the telecommunications market – politically, economically, and in regulatory terms, both in Germany and across the European Union.

VATM represents 200 member companies, including network operators, service providers, mobile network operators, suppliers, and (internationally active) business-to-business providers. It acts as the representative body for the key investors in fibre rollout and for access-based competition among nationwide providers. VATM accounts for around 80% of fixed-line customers and almost all mobile customers outside Telekom.

Section I

Spotlights

The telecommunications industry invests 24.8 % of its revenue – significantly more than other sectors

Spotlight 1: Revenue and investment ratio
(Estimate for full year 2026)



Revenue
Telecommunications services
2026e

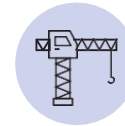
€ 59.7
billion



**Investment
ratio**

24.8 %

Comparative figures for other industries (2024)



Construction
industry

3.6 %



Automotive industry

8.1 %

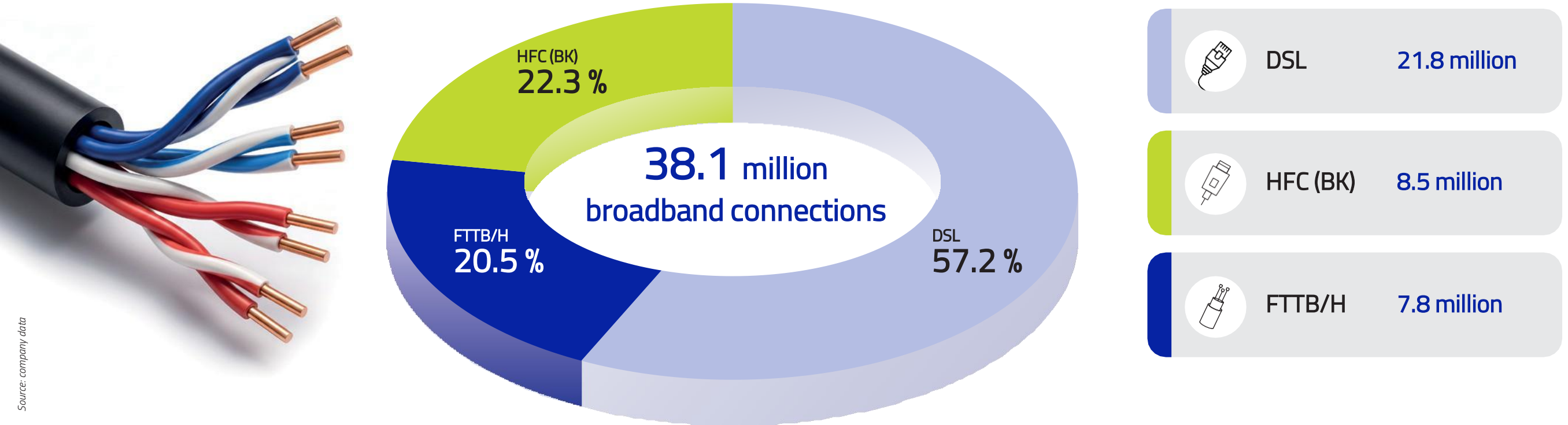


Chemical and
pharmaceutical industry

11.6 %

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

Mobile network operators have issued 227.9 million SIM cards

Spotlight 4: SIM Cards by Mobile Network^a
(Estimate for end of 2026)



a) The figures are not directly comparable due to differing reporting periods for low-usage and inactive prepaid SIM cards. Includes physical SIM cards and eSIMs, as well as M2M SIMs, MVNE SIMs, low-usage SIMs, and SIMs used for fixed-location applications.

Mobile networks significantly outperform their reputation – almost 100 % of households are covered by 5G

Spotlight 5: 5G Mobile Network Coverage^a
(Estimate for end of 2026)



5G
household coverage

99.8 %



5G
geographic coverage

96.5 %

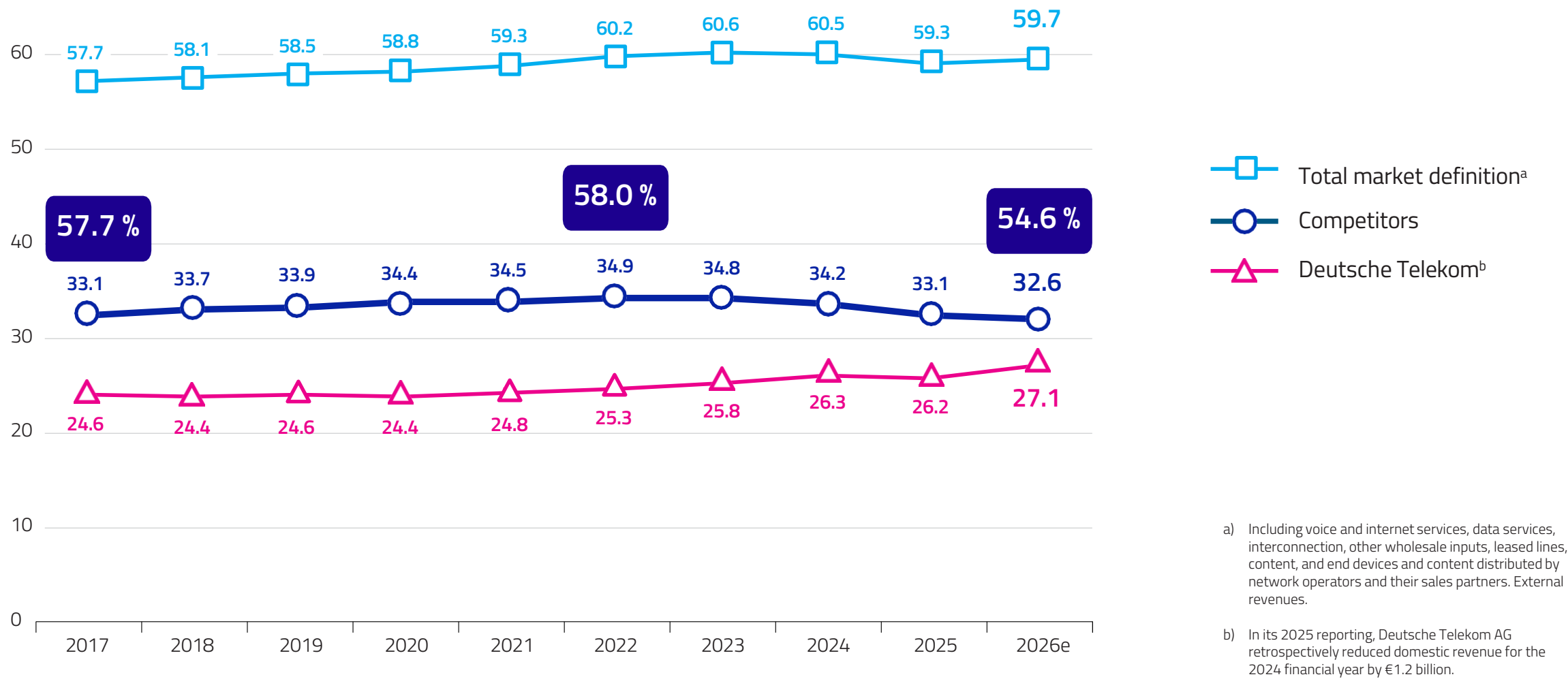
a) Outdoor coverage based on area or households, provided by at least one network operator.

Section II

Markets for Telecommunications Services

Competition under pressure: since 2023, Telekom has continuously increased its domestic revenues at the expense of competing providers

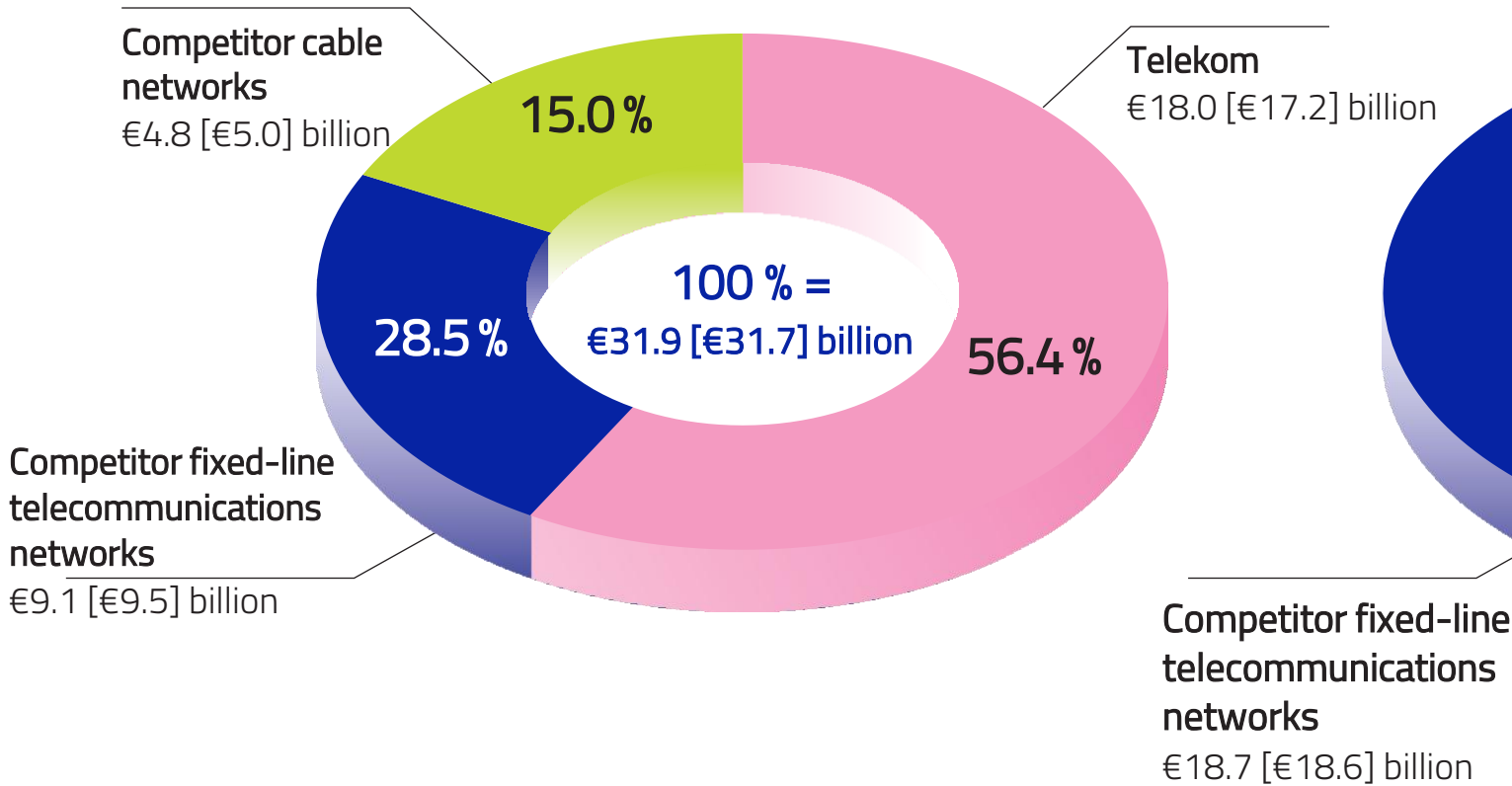
Fig. 1: Overall Market for Telecommunications Services
(Estimate for end of 2026)



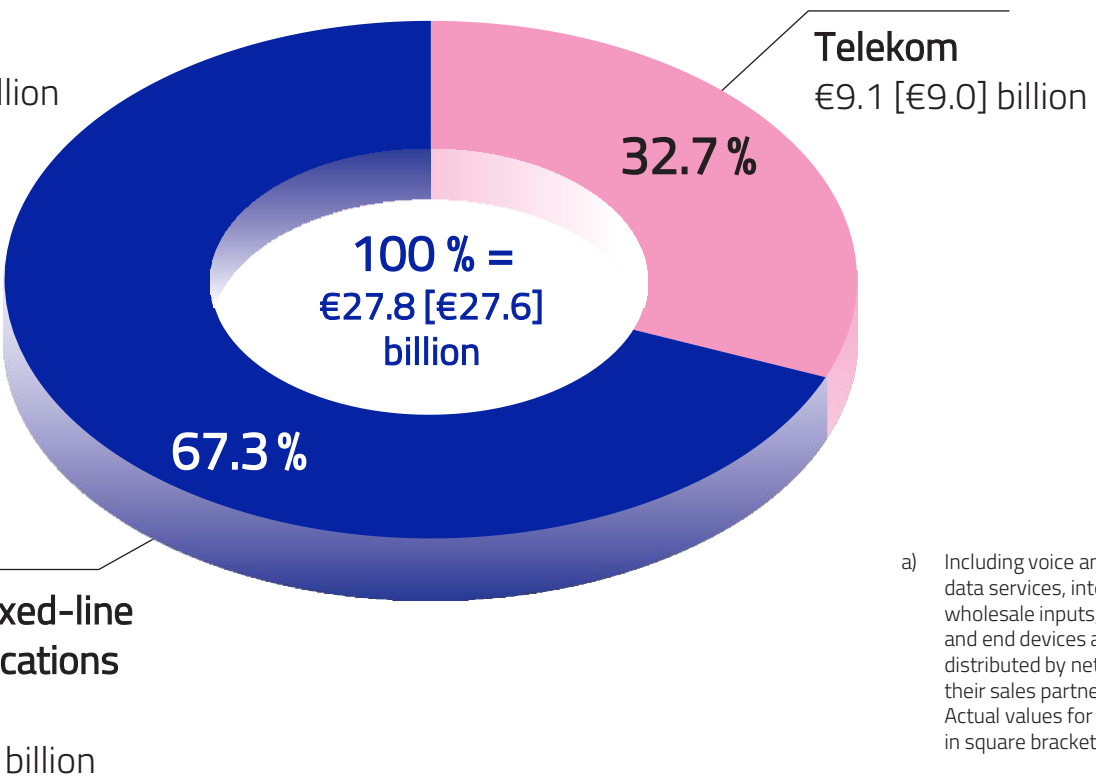
Total market in motion: Telekom expands in mobile and especially fixed-line market

Fig. 2: Fixed-Line and Mobile Telecommunications Market^a
(Estimate for end of 2026)

Fixed-line segment



Mobile segment

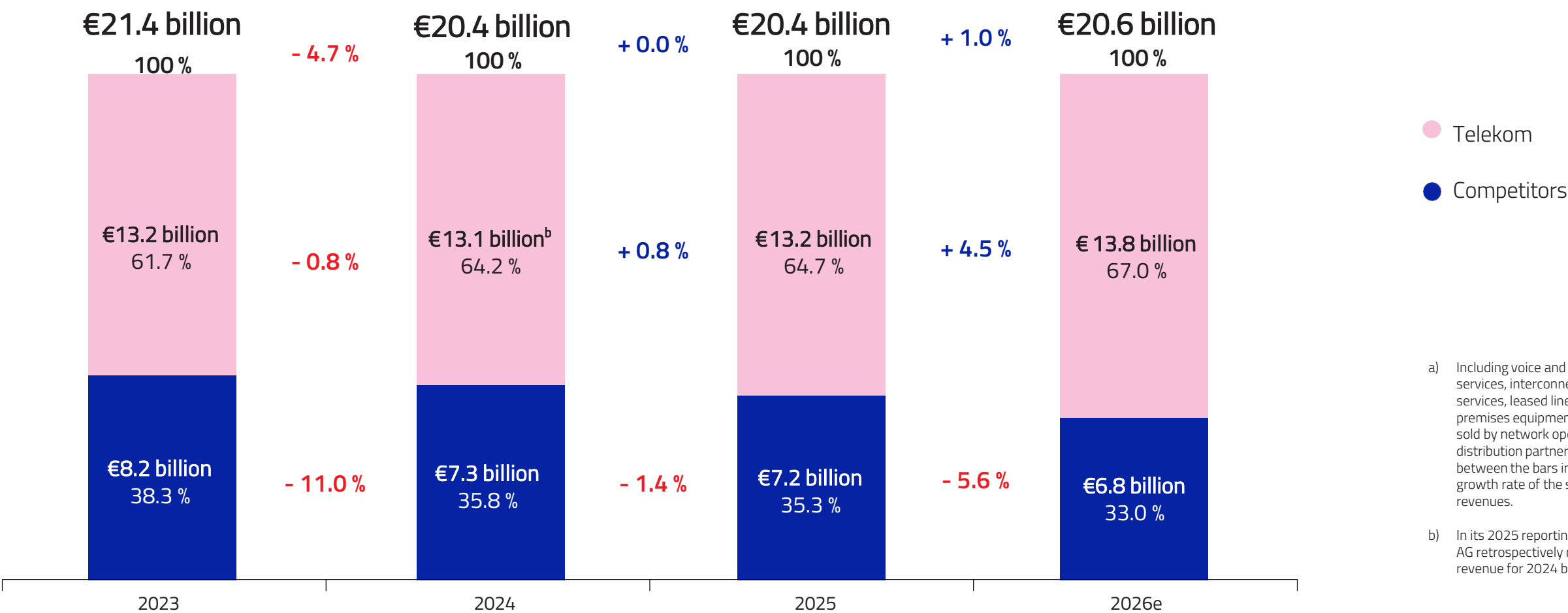


a) Including voice and internet services, data services, interconnection, other wholesale inputs, leased lines, content, and end devices and content distributed by network operators and their sales partners. External revenues. Actual values for full-year 2025 shown in square brackets.

Total market: €59.7 billion [€59.3 billion]

Adverse for the economy: In the business customer market, dependent on regulation, Telekom is expected to reach a 67 % market share in 2026

Fig. 3: Business customer market^a
(Estimate for end of 2026)

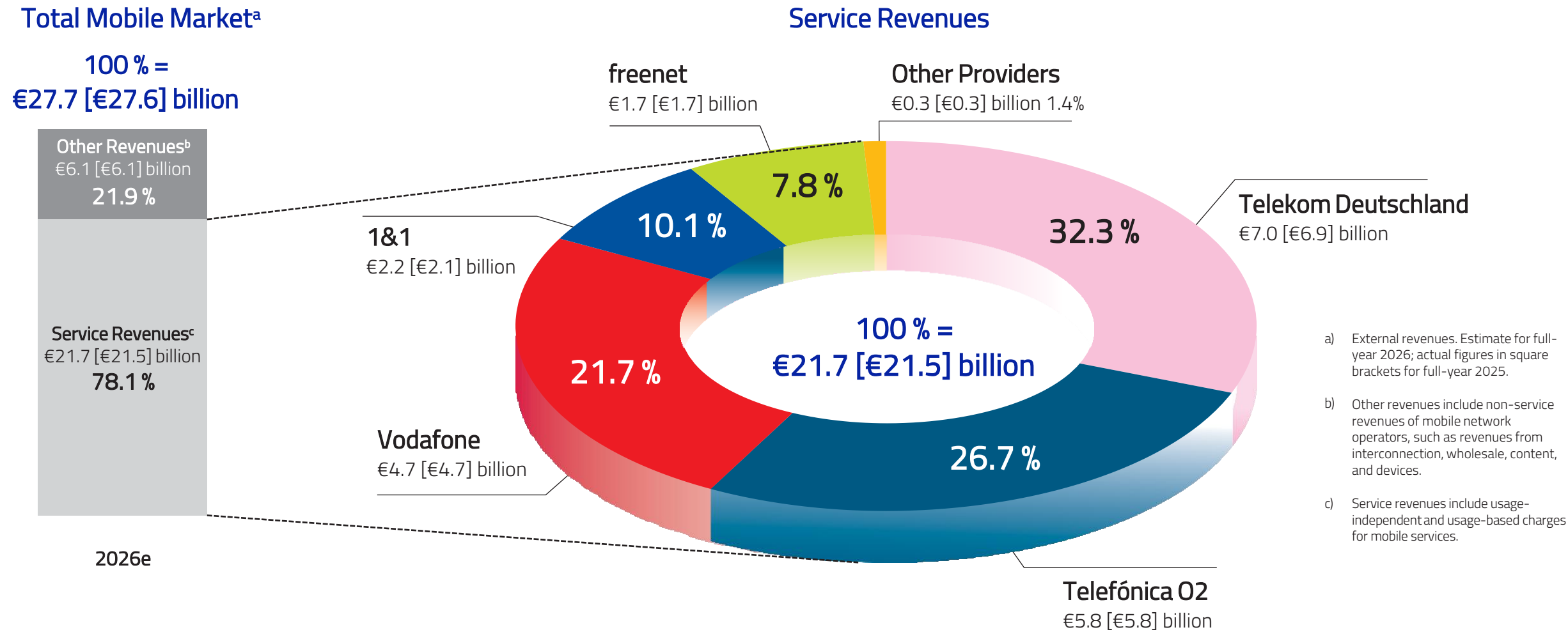


a) Including voice and internet services, data services, interconnection, other wholesale services, leased lines, content, customer premises equipment (CPE), and content sold by network operators and their distribution partners. Figures shown between the bars indicate the annual growth rate of the segment. External revenues.

b) In its 2025 reporting, Deutsche Telekom AG retrospectively reduced its domestic revenue for 2024 by €1.2 billion.

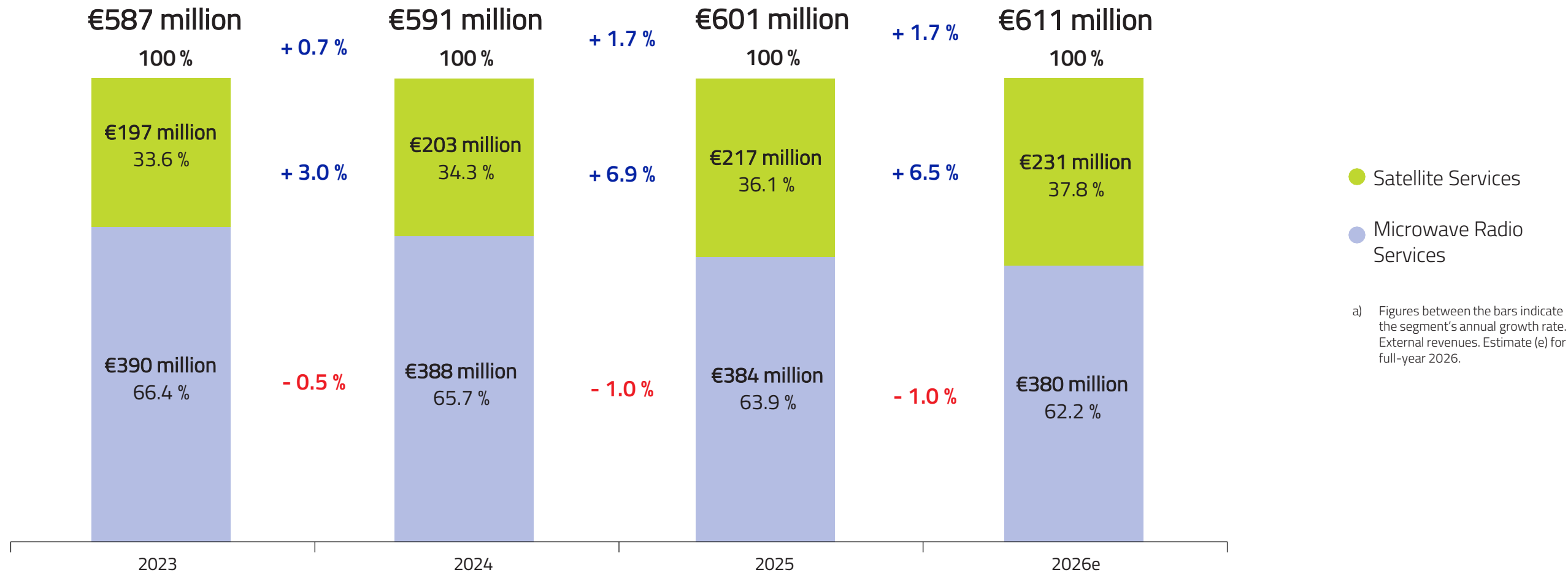
More than three-quarters of mobile service revenues are generated from service-related offerings – The overall revenues remain stable

Fig. 4: Structure of Mobile Revenues



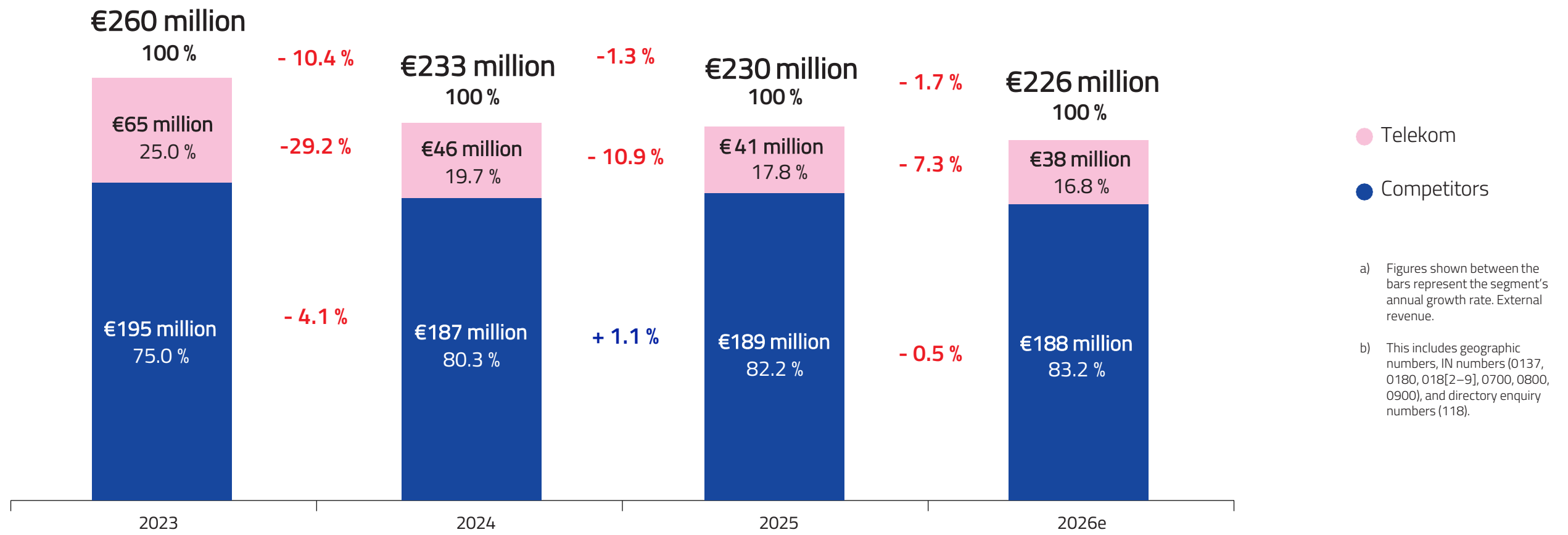
In the microwave radio services market segment, revenues are expected to decline slightly in 2026 – The satellite services segment continues to grow

Fig. 5: Microwave Radio and Satellite Services Market^a



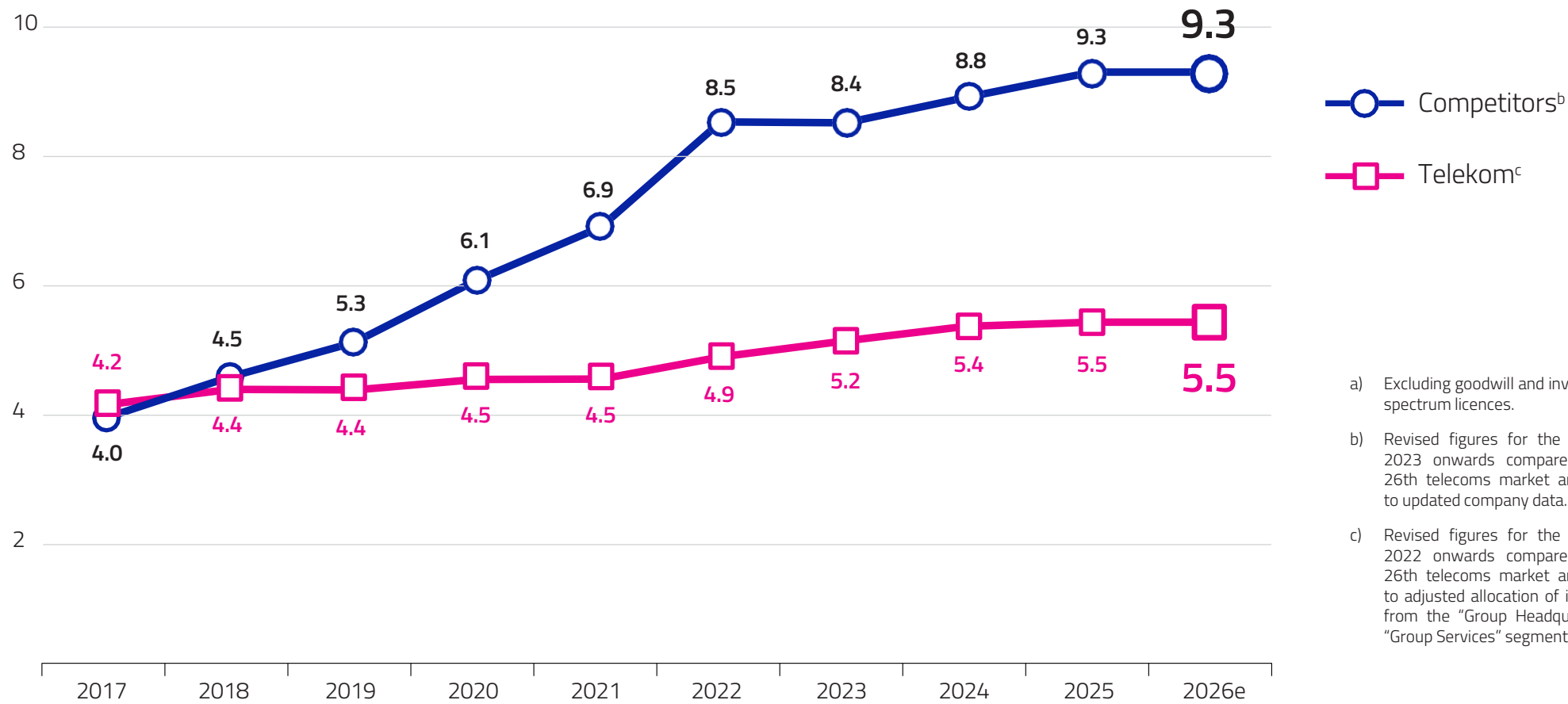
Service numbers continue to generate well over €200 million in revenue – only a slight decline

Fig. 6: Premium Rate and Service Numbers Market^{a,b}
(Estimate for end of 2026)



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.

Section III

Civil Engineering Planning for Broadband Rollout

Development of enquiries across Germany

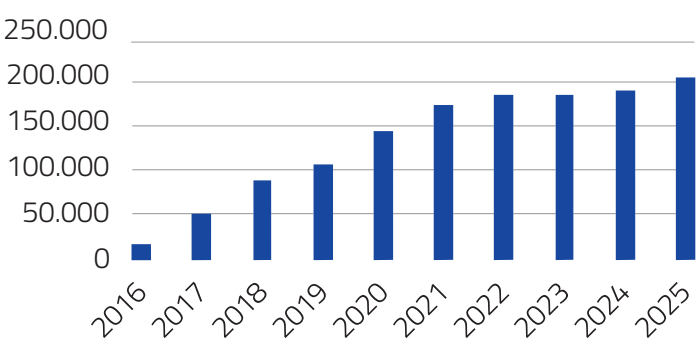
The BIL portal: a key platform for infrastructure enquiry, utility mapping, and safety management – a statistical analysis 2016–2025

Fig. : BIL-Portal - Statistical analysis 2016 - 2025

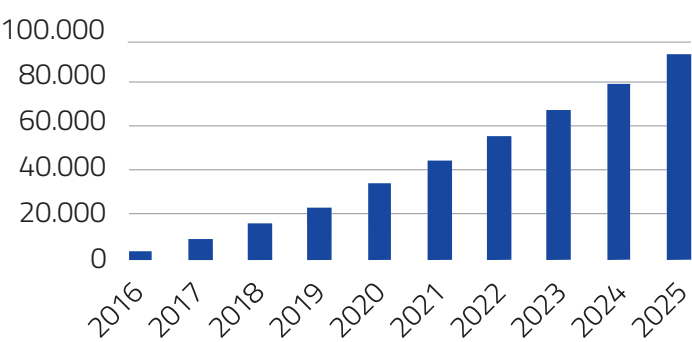
The BIL portal is a central tool for identifying and coordinating potential risks relating to underground infrastructure. Considering the growing demand for communications, power generation, transmission and distribution networks, its importance continues to increase. It is being used more extensively, particularly in the context of network expansion, for enquiries relating to buried utility lines.

As a central access point for utility location information, the BIL portal is used by around 1,000 users. In 2025, a total of 205,000 enquiries were processed, resulting in a comprehensive dataset comprising 1.5 million planning and construction requests. Since the platform was launched in 2016, the number of registered users has grown to over 80,000, with an average of 250 new users joining each week.

Growth Enquiries

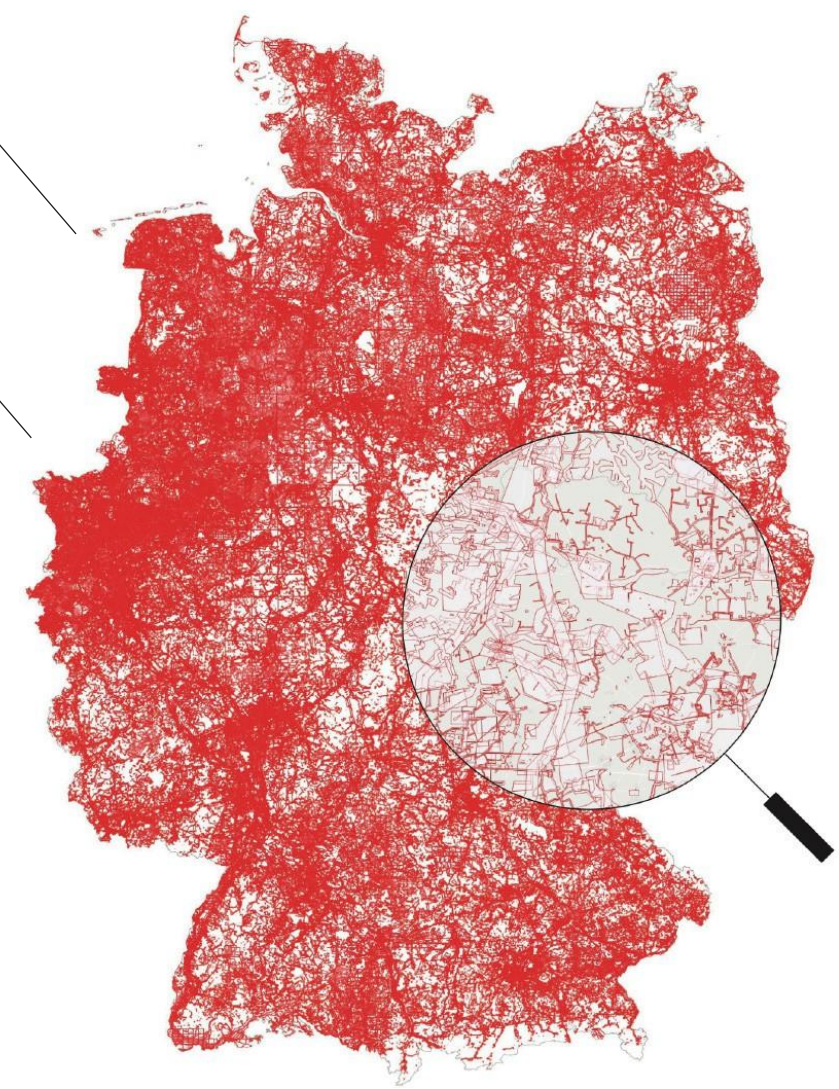


Development Users



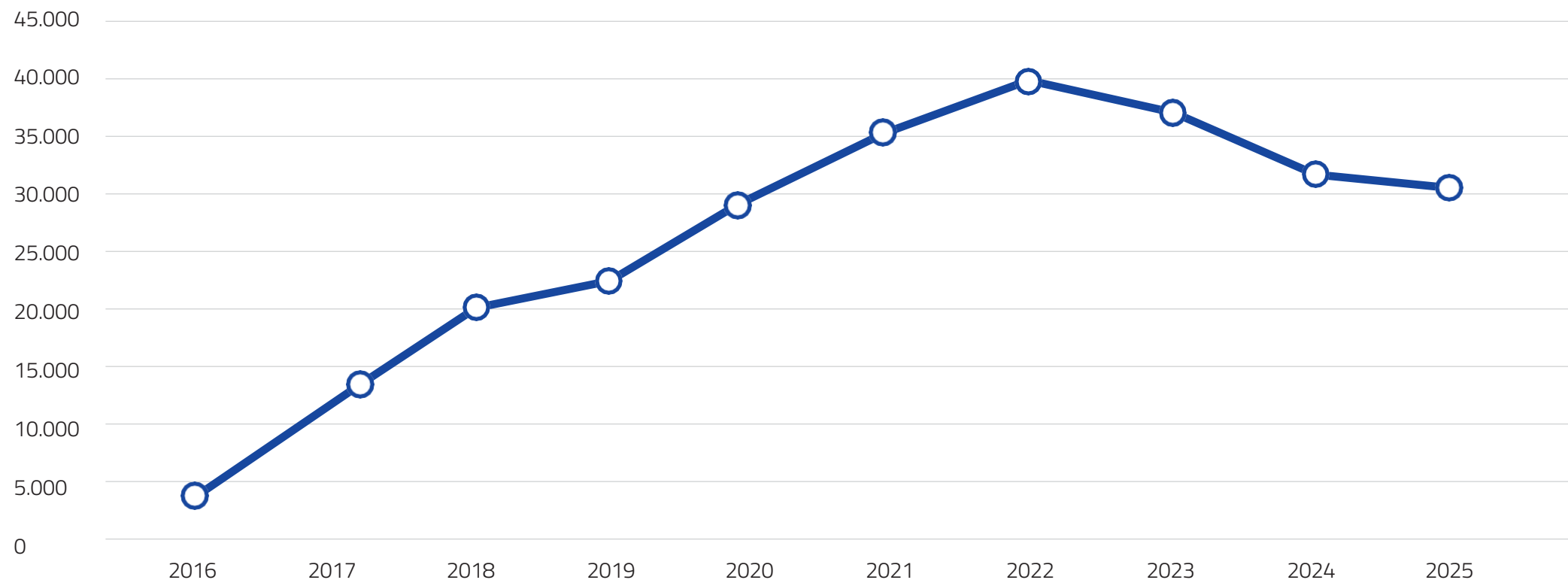
1.5 million enquiries

80,000 Users



15 % of all enquiries in 2025 relate to broadband projects – The volume of requests has been levelling off since 2022

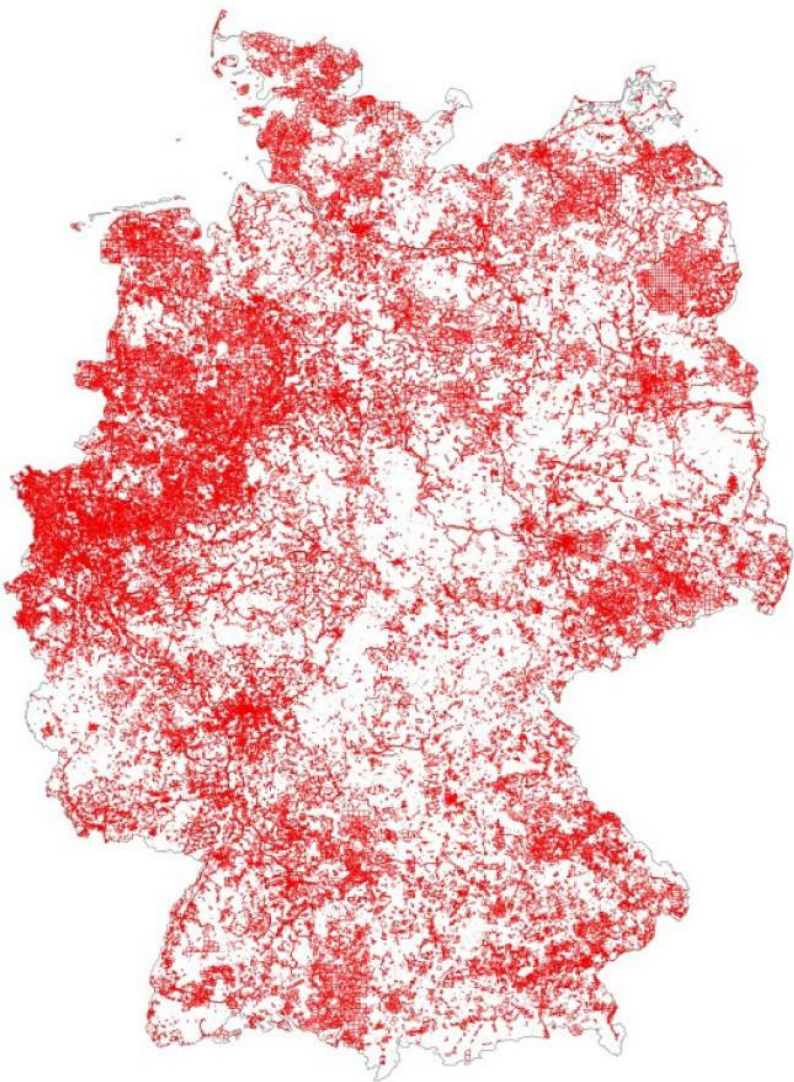
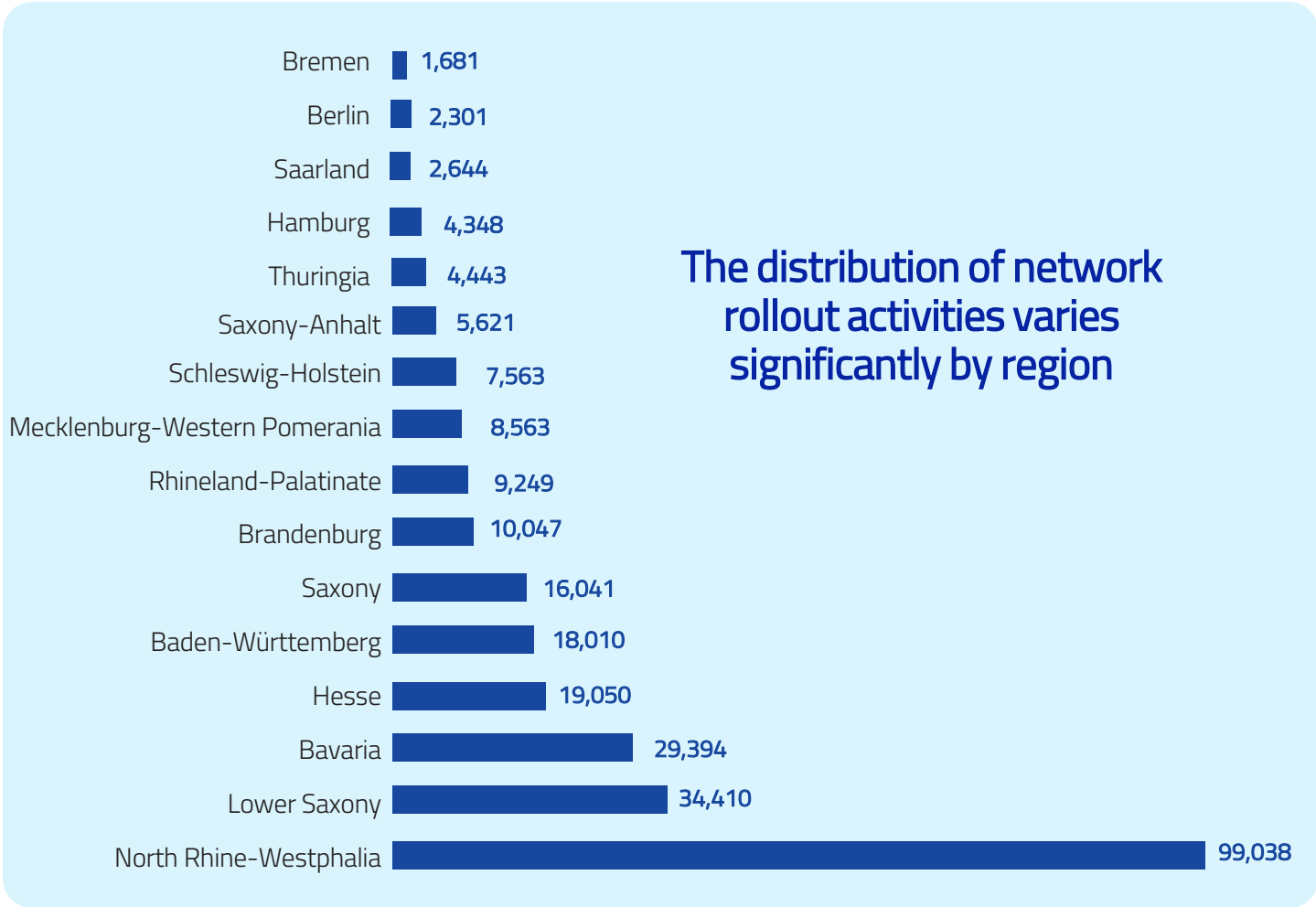
Fig. : Enquiries^a regarding broadband roll-out on the BIL portal in thousands
(Source: BIL eG)



a) With a total of **262,296** enquiries, the number of broadband-related requests has risen steadily since 2016, reflecting the intensive phase of network rollout. The number of submitted enquiries peaked in 2022. Since then, broadband-related requests have been declining: in 2025, **5%** fewer enquiries were submitted compared with the previous year. This may indicate that a large proportion of planned projects have now been completed, with the focus shifting from deployment towards the operation and optimisation of existing infrastructure.

Over time, network rollout has increasingly expanded beyond urban centres into more rural and dispersed areas

Fig. : Broadband rollout enquiries^a
(enquiries since 2016, source: BIL eG)



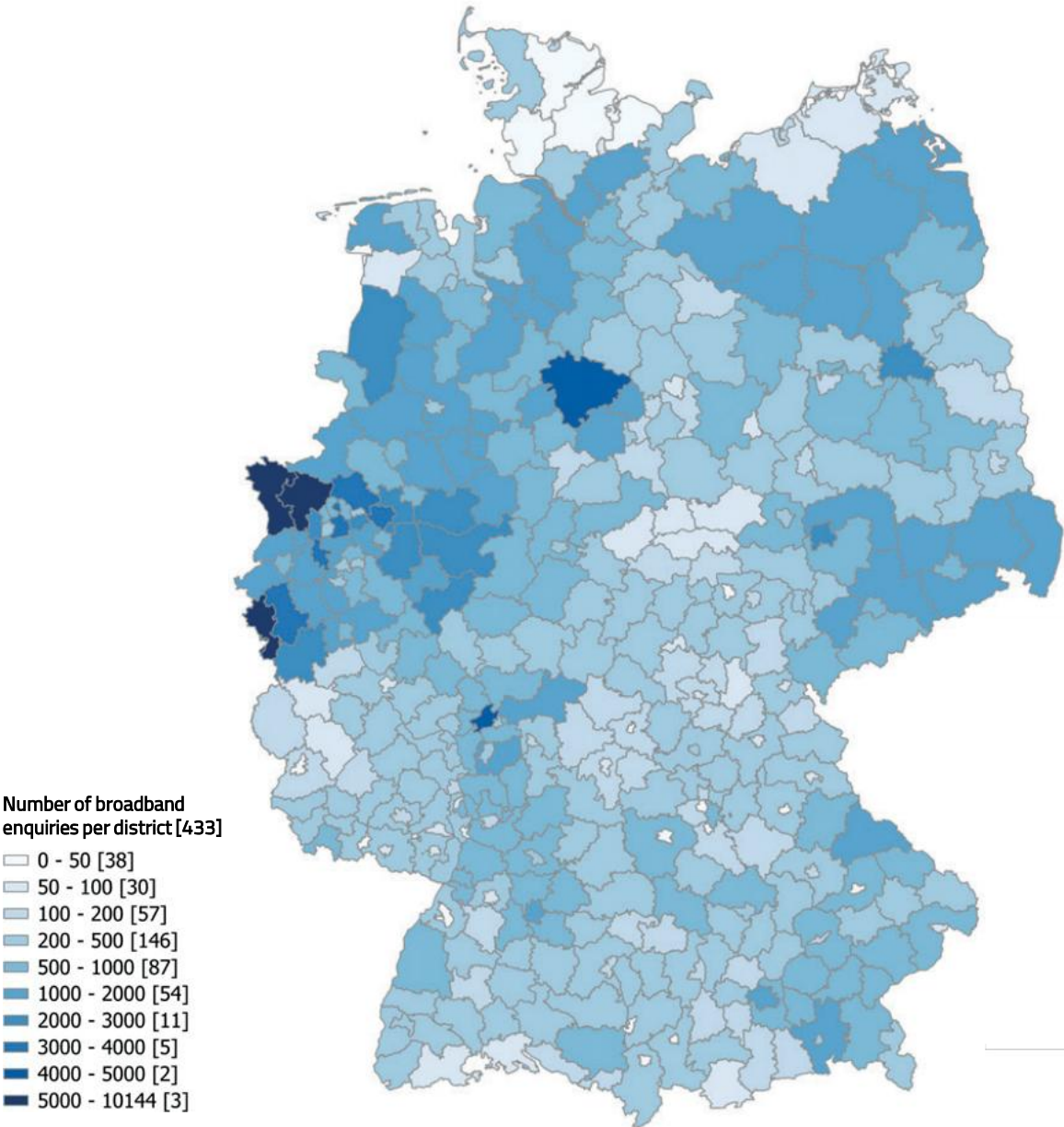
a) 262,296 broadband rollout enquiries since 2016.

At district level, a breakdown of local authorities reveals significant differences in the number of enquiries

Fig.: Regionale Schwerpunkte beim Breitbandausbau^a
(Source: BIL eG)

The top 25 areas already account for 30% of all enquiries, with volumes declining significantly beyond that point.

District	Kleve	10,144
District	Wesel	6,422
District	Urban region Aachen	6,074
Rural district	Region Hannover	4,734
Independent city	Frankfurt am Main	4,024
Independent city	Dortmund	3,999
District	Recklinghausen	3,700
Independent city	Essen	3,684
District	Düren	3,219
Independent city	Düsseldorf	3,170
District	Hochsauerland district	2,697
District	Siegen-Wittgenstein	2,665
District	Soest	2,438
Independent city	Berlin	2,355
District	Euskirchen	2,244
Independent city	Bochum	2,242
District	Unna	2,225
Independent city	Duisburg	2,221
Independent city	Leipzig	2,218
District	Märkischer district	2,101
Rural district	Emsland	2,080
District	Mettmann	1,964
District	Viersen	1,956
Rural district	Osnabrück	1,950
District	Borken	1,875



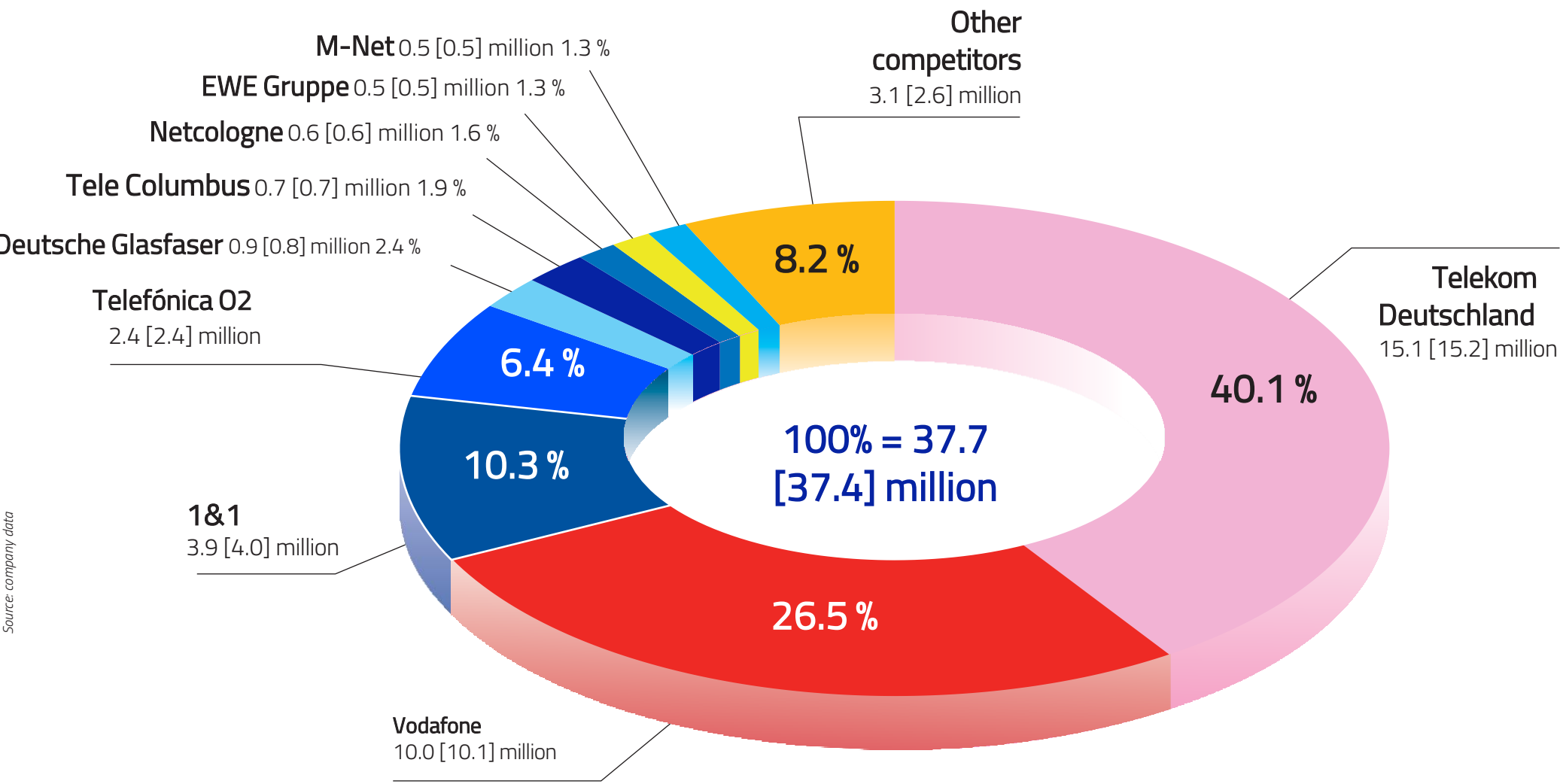
a) The figures are not always directly comparable, as the scope of the requested measures may be recorded very differently by respondents.

Section IV

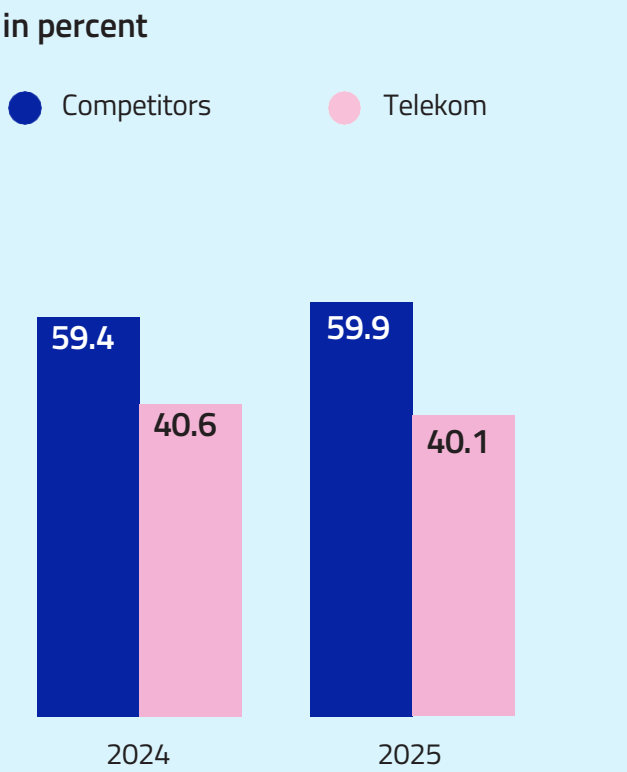
Fixed Broadband

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)



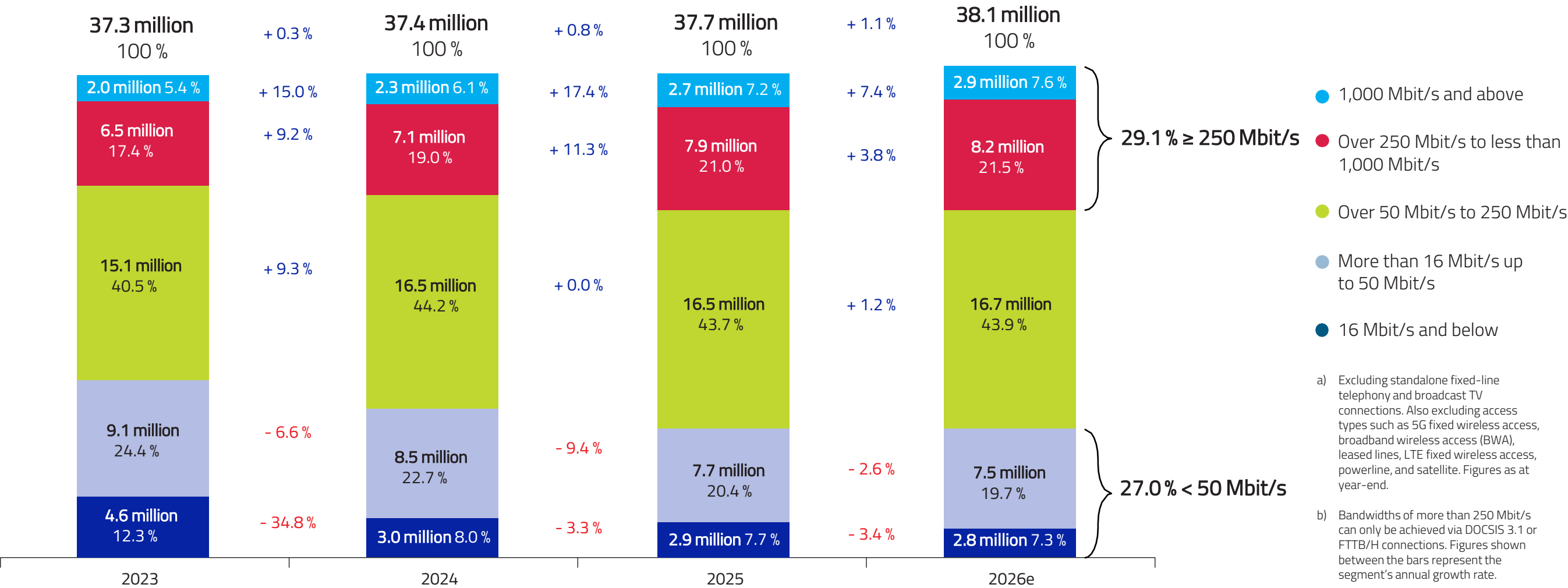
Retail customer market shares



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.

Demand for high-performance internet has risen to over 29 % – 27 % of requested connections deliver speeds of less than 50 megabits per second

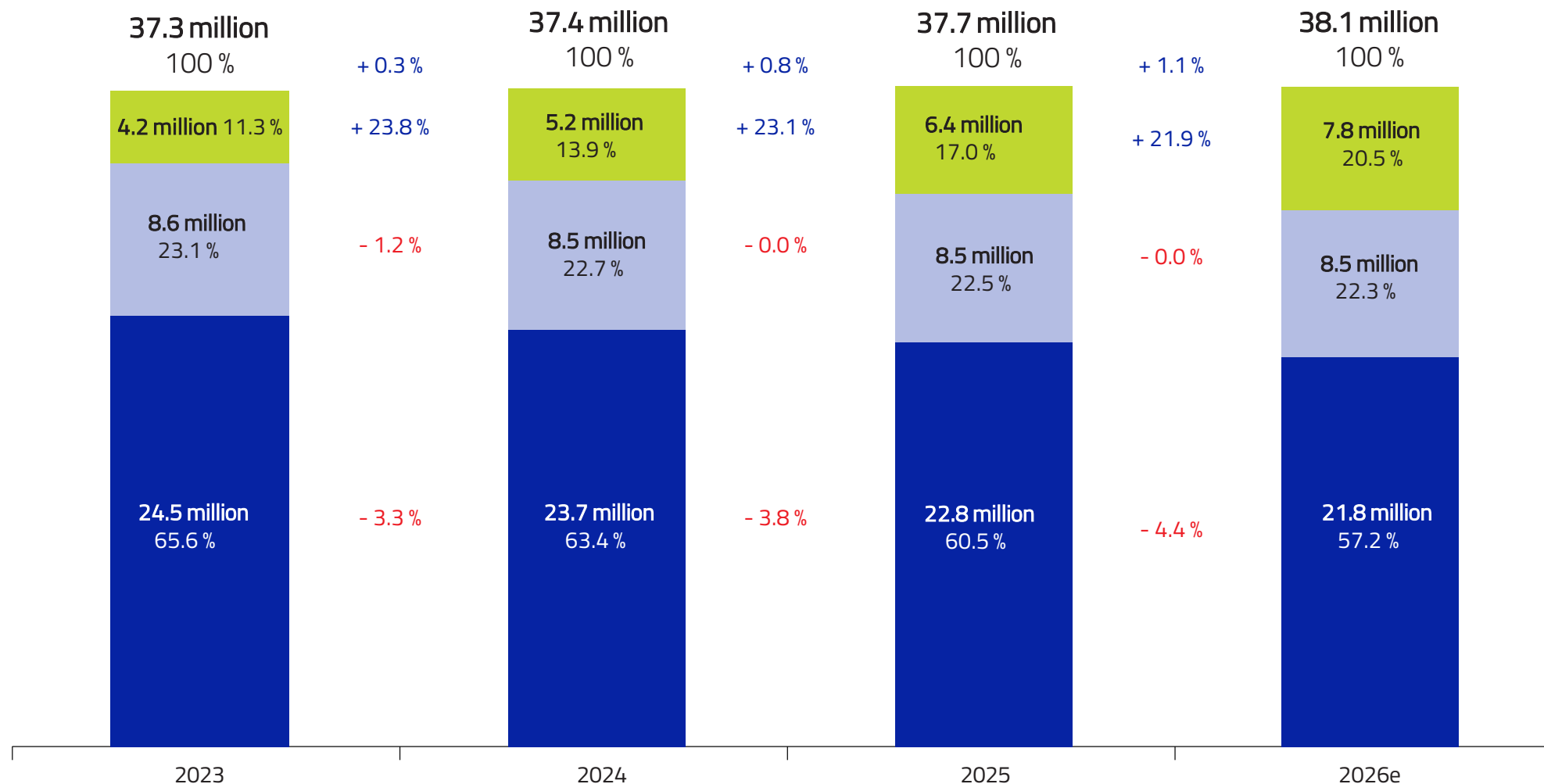
Fig. 9: Demand for Broadband Connections^a by Downstream Bandwidth^b
(Estimate for end of 2026)



FTTB/H is growing strongly within the broadband market – Copper-based DSL connections are being substituted by fibre-optic connections

26

Fig. 10: Active Broadband Connections^a by Network Technology^b
(Estimate for end of 2026)



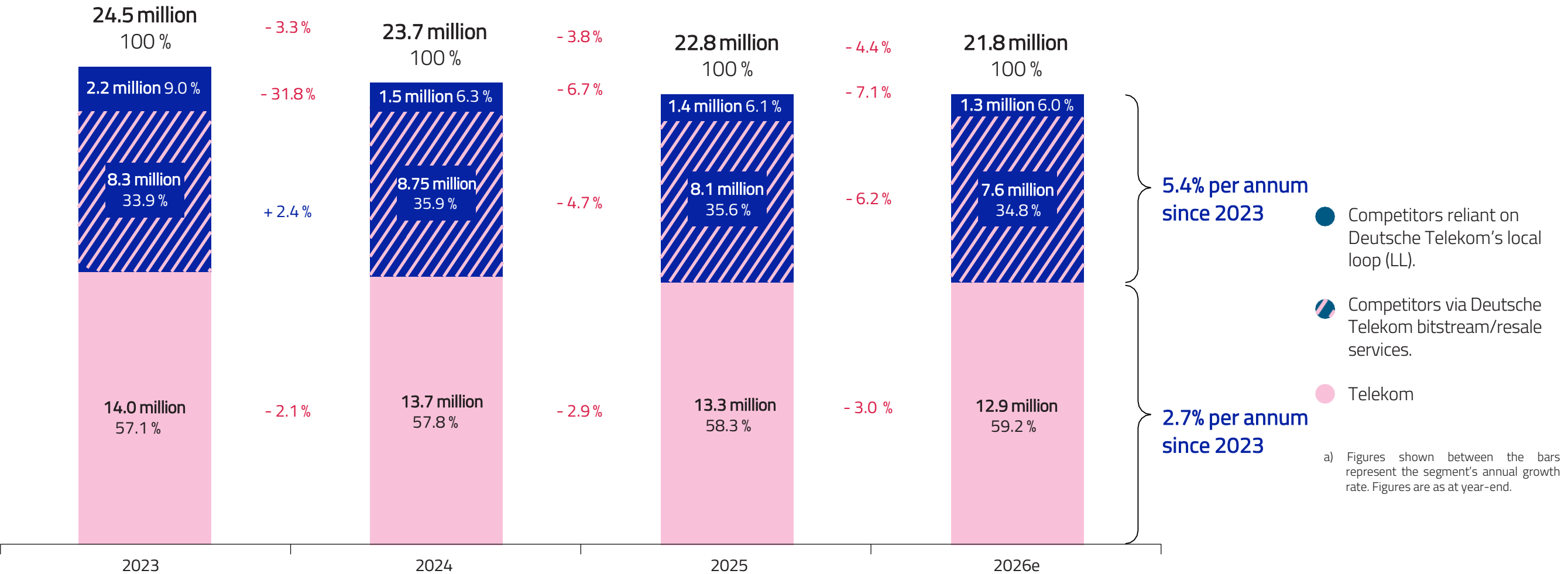
- FTTB/H
- HFC (BK)
- DSL

a) Excluding standalone fixed-line telephony and broadcast TV connections. Also excluding access types such as 5G fixed wireless access, broadband wireless access (BWA), leased lines, LTE fixed wireless access, powerline, and satellite. Figures are as at year-end.

b) Figures shown between the bars represent the segment's annual growth rate.

Telekom's market share in the shrinking DSL market continues to increase and is expected to reach 59.2 % by the end of 2026

Fig. 11: Active DSL Connections^a
(Estimate for end of 2026)

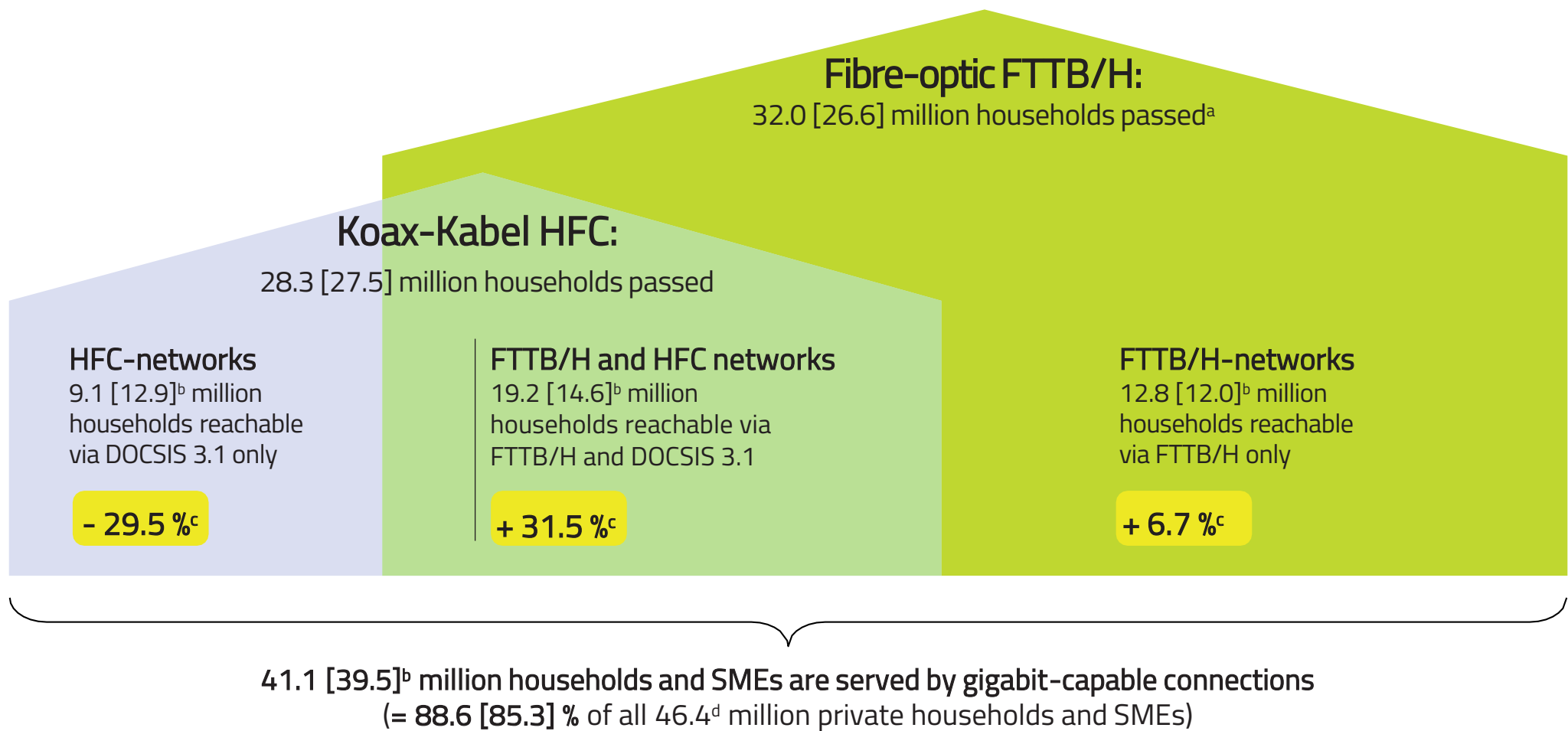


Section V

Fibre Broadband

By the end of 2026, just under 90 % of all households and SMEs will be covered by a gigabit-capable access network – 32 million households and SMEs will have access to fibre-optic

Fig. 12: Gigabit-Ready Homes & SMEs (Homes Passed)
(Estimate for end of 2026)



a) Including double counting due to multiple network rollouts by different carriers.

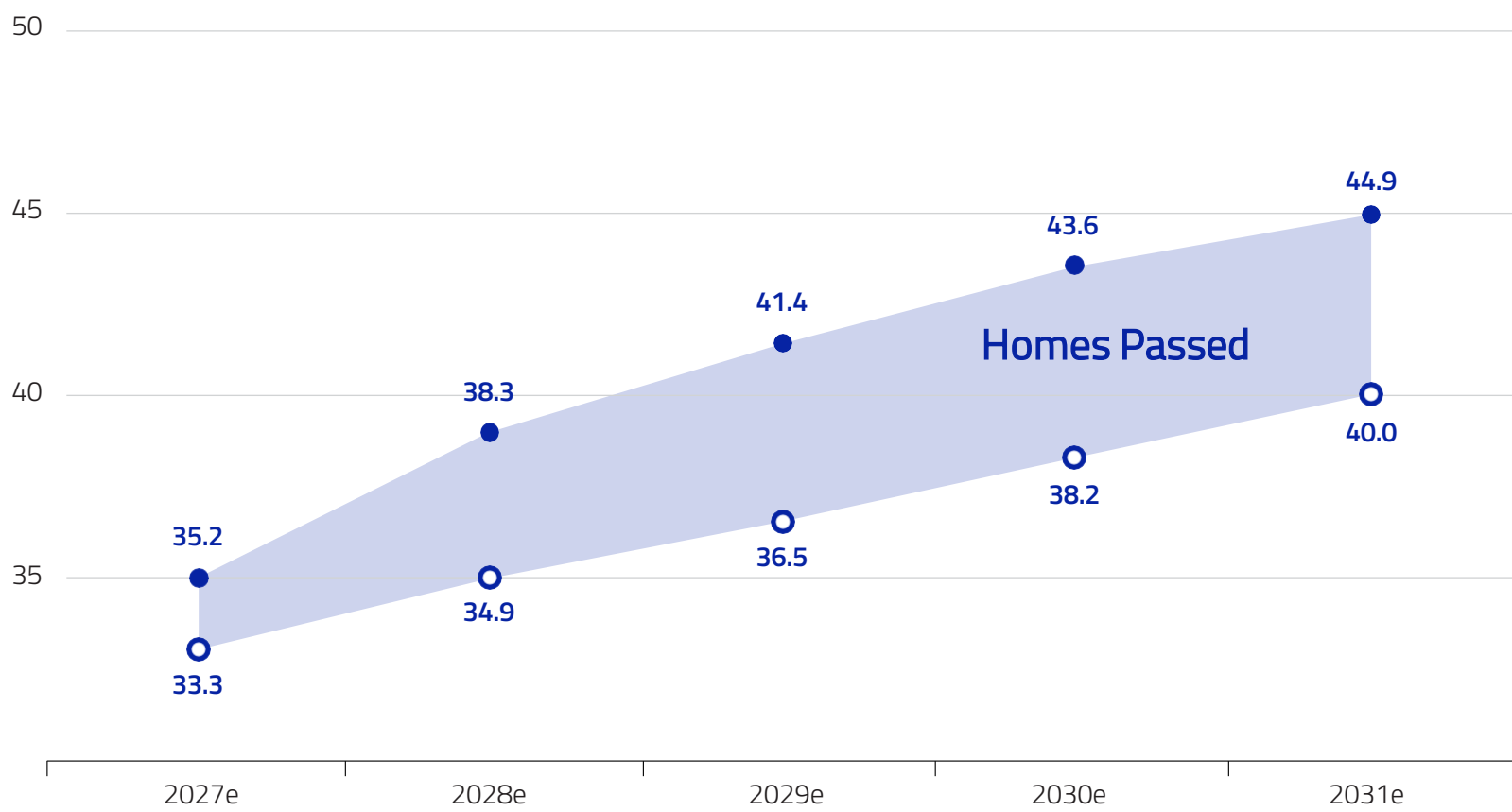
b) Actual values in square brackets for end-2025.

c) Figures in the yellow-highlighted fields represent the growth rate for the current year.

d) 46.4 million units to be supplied: 42.7 million private households and 3.7 million business premises of small and medium-sized enterprises (SMEs).

In the optimistic scenario, by the end of 2031, dedicated fibre duct systems or fibre drop lines will have been deployed for 97 % of German households and SMEs

Fig. 13: Forecast of Homes Passed (Carrier Perspective^a) for FTTB/H Access Networks (in million connections)



Optimistic scenario

New regions

- HP growth: 3.1 million per annum up to 2029, thereafter slowing to 1.3 million per annum
- No parallel rollout
- Continued rollout in previously unserved areas
- Significant full shutdown of DSL access areas expected before 2030

Pessimistic scenario

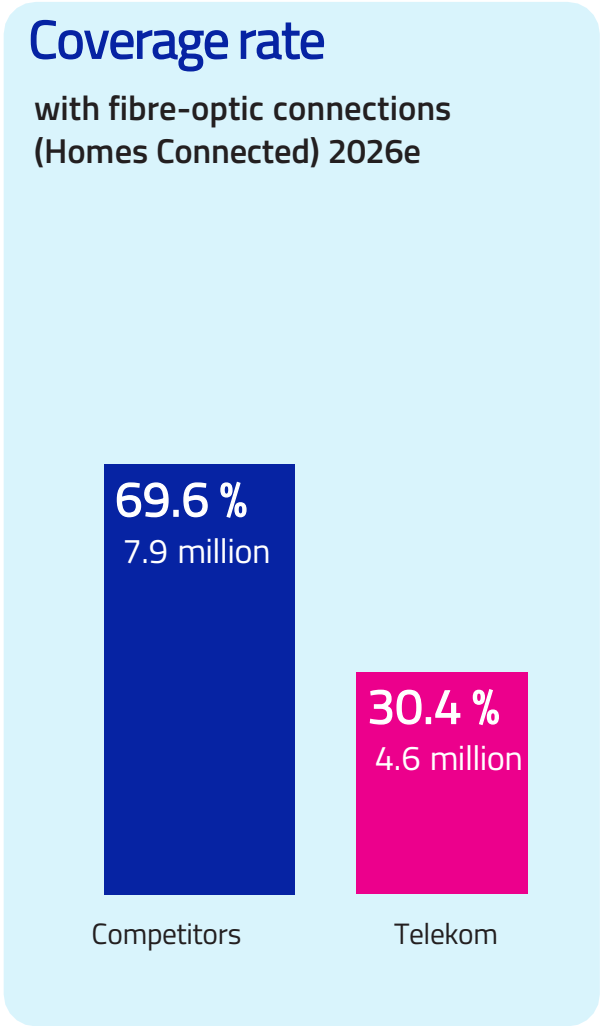
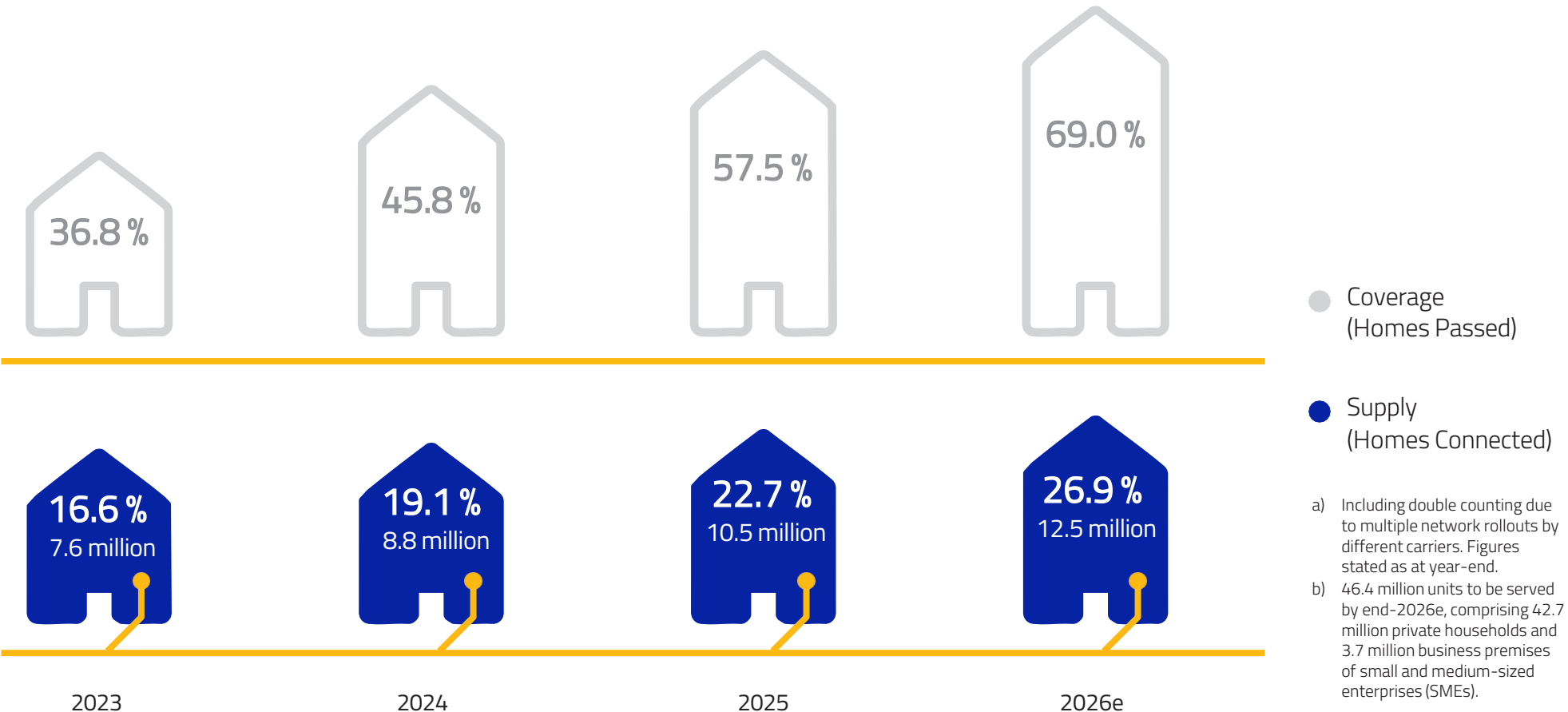
Parallel rollout

- HP growth: 1.6–1.8 million per annum
- Limited parallel rollout in areas already served by fibre
- Predominantly rollout in previously unserved areas
- No significant full shutdown of DSL access areas expected before 2030

a) Including double counting due to multiple network rollouts by different carriers. Forecast figures, stated as at year-end.

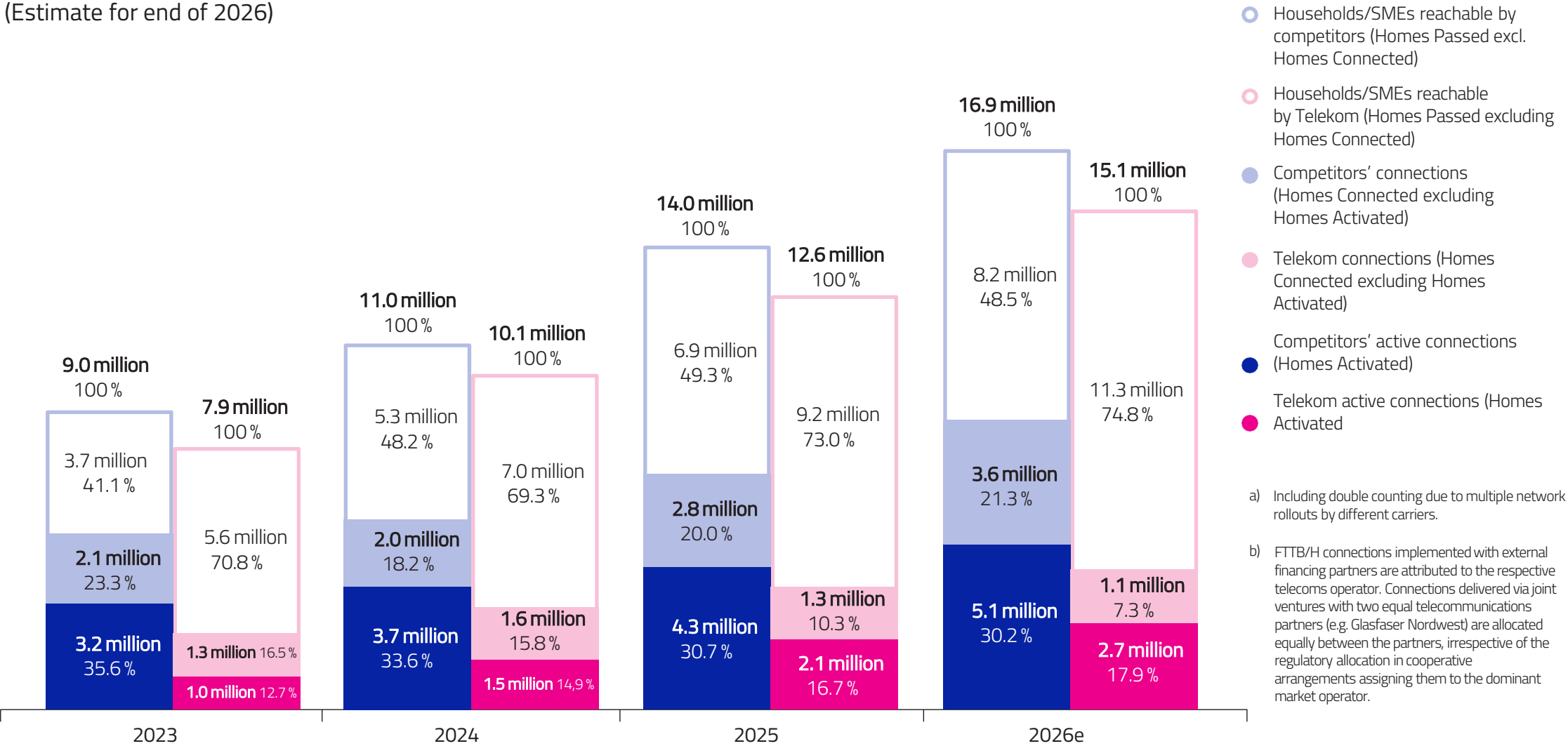
The fibre coverage rate (homes connected) will reach 26.9 % by the end of 2026 – just under 70 % of these 12.5 million connections will be provided by competitors

Fig. 14: Homes Passed^a and Homes Connected^b Penetration Rates
(Estimate for end of 2026)



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

- Households/SMEs reachable by competitors (Homes Passed excl. Homes Connected)
- Households/SMEs reachable by Telekom (Homes Passed excluding Homes Connected)
- Competitors' connections (Homes Connected excluding Homes Activated)
- Telekom connections (Homes Connected excluding Homes Activated)
- Competitors' active connections (Homes Activated)
- Telekom active connections (Homes Activated)

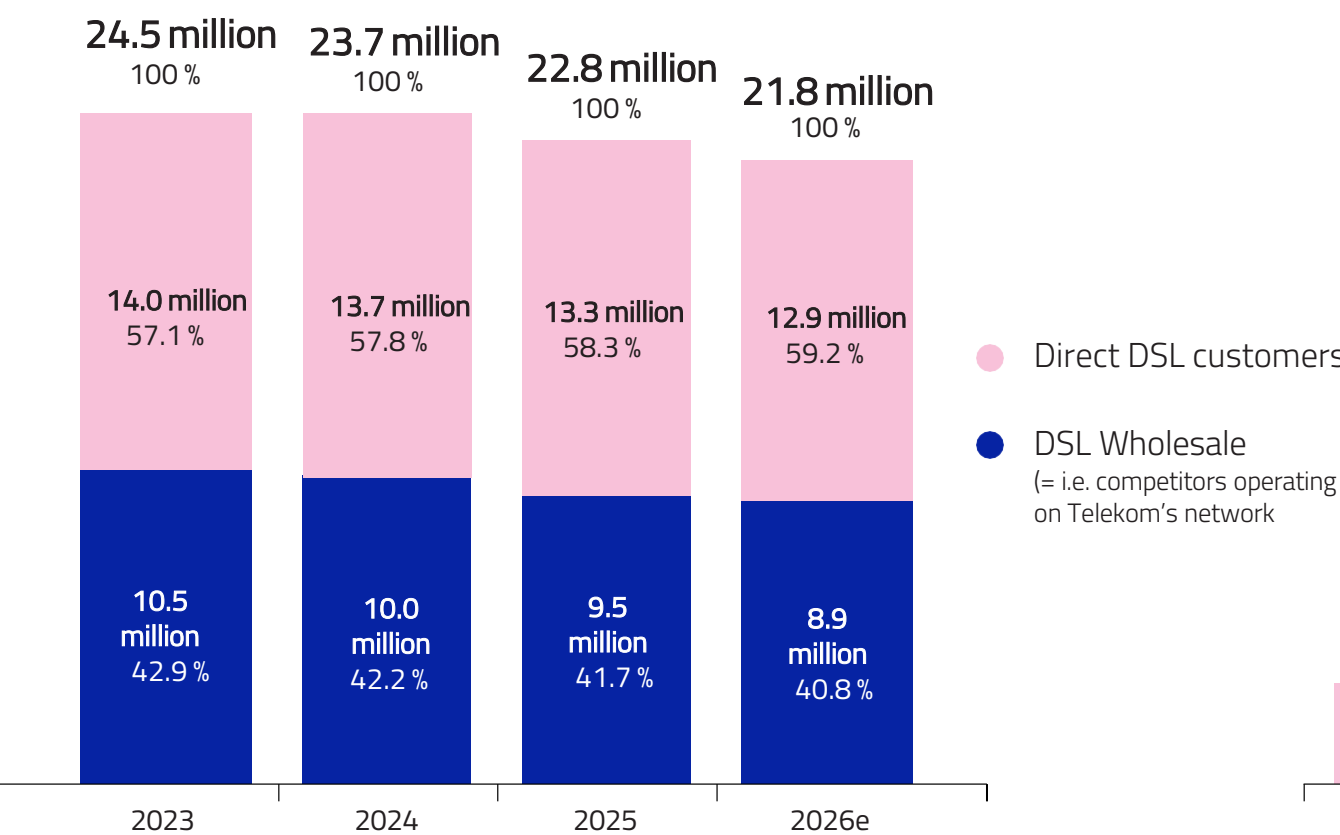
a) Including double counting due to multiple network rollouts by different carriers.

b) FTTB/H connections implemented with external financing partners are attributed to the respective telecoms operator. Connections delivered via joint ventures with two equal telecommunications partners (e.g. Glasfaser Nordwest) are allocated equally between the partners, irrespective of the regulatory allocation in cooperative arrangements assigning them to the dominant market operator.

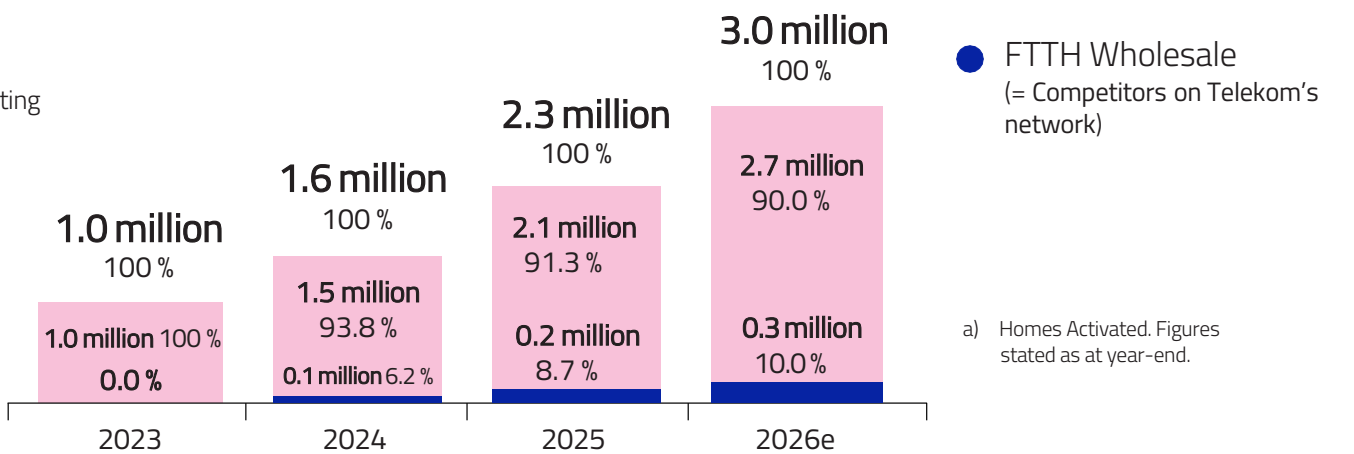
Usage of Telekom’s FTTH platform by competitors is increasing very slowly – The market requires significantly more effective regulation for FTTH

Fig. 16: Retail market shares^a on Telekom DSL- and FTTH-platform
(Estimate for end of 2026)

DSL access network



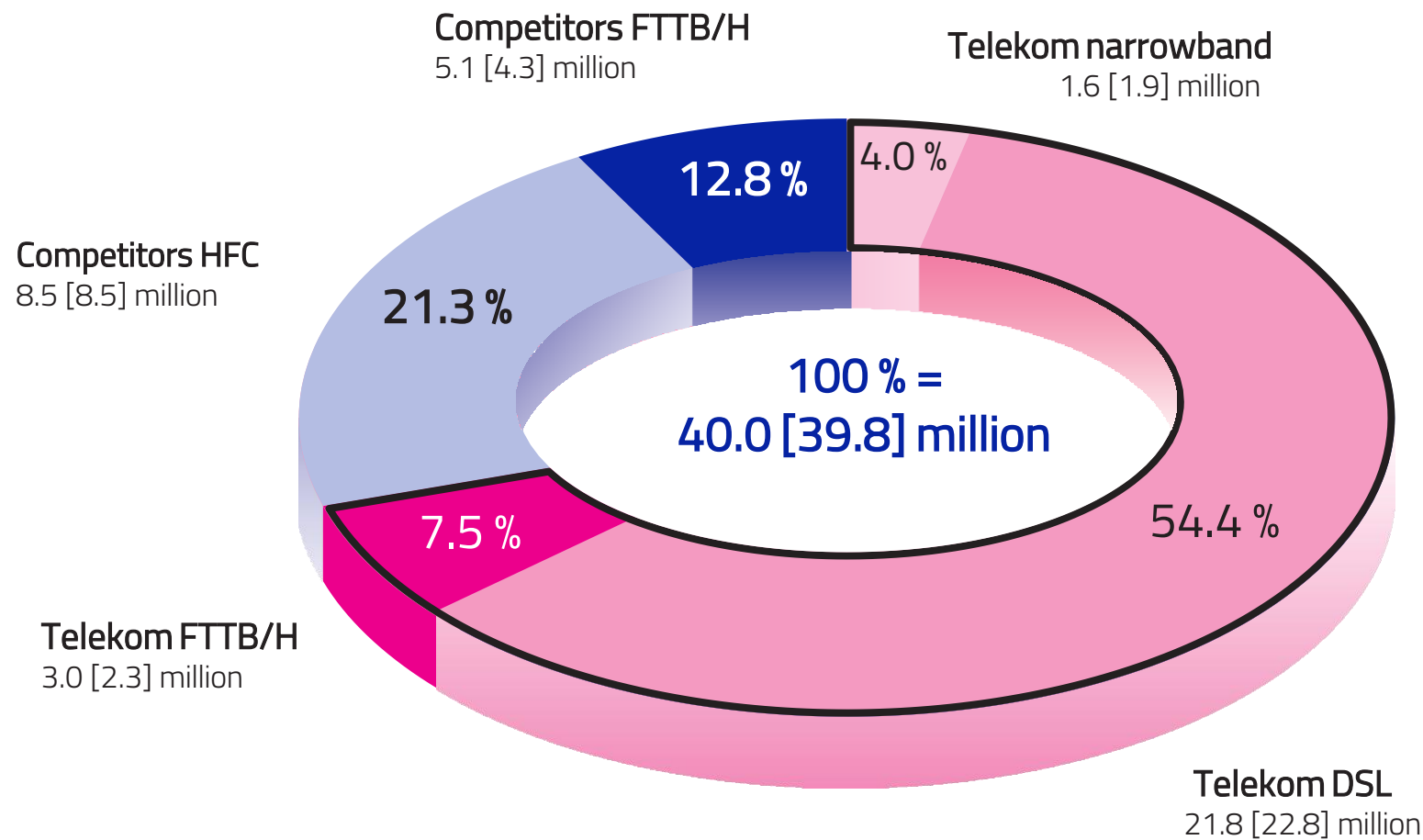
FTTH access network



a) Homes Activated. Figures stated as at year-end.

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 %

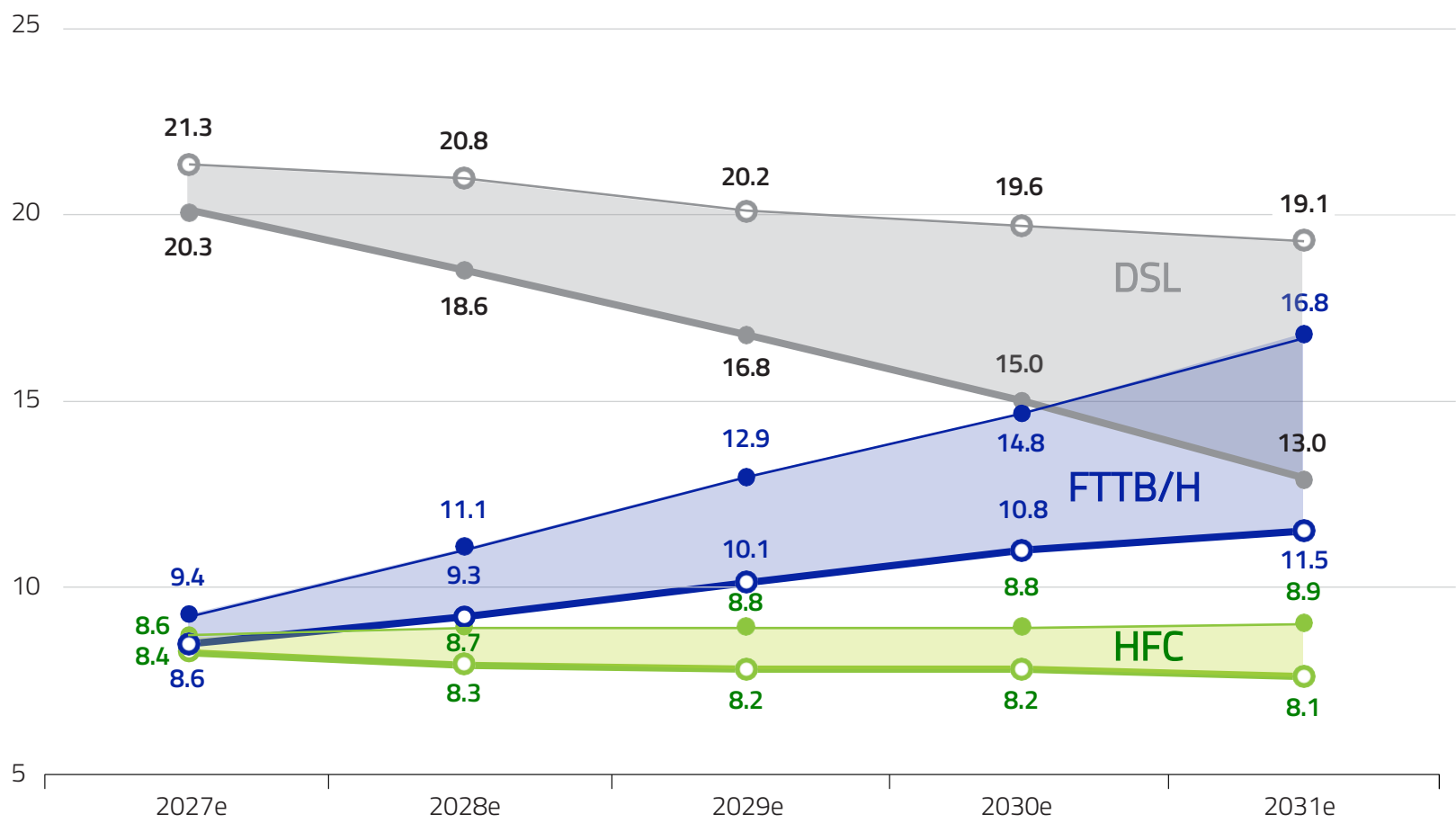
- Predominantly fully depreciated copper twin-core lines
- 26.4 million actively used access lines owned by Telekom
- Telekom generates revenue from 26.4 million access lines, either directly from retail customers or via wholesale services.

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.

Only from 2031 onwards could fibre broadband, under favourable conditions, overtake DSL as the most widely used access technology

Fig. 18: Forecast of actively used fixed-line broadband connections^a by technology (in millions of connections)



Pessimistic scenario Holding on to Copper

- FTTB/H-Growth < 1 million per annum
- Restrained Growth of the broadband connection
- Focus on Homes Passed-buildout (satisfies policymakers)
- No significant complete shutdown of DSL overage areas before 2030

Optimistic scenario Push of Fibre Optics

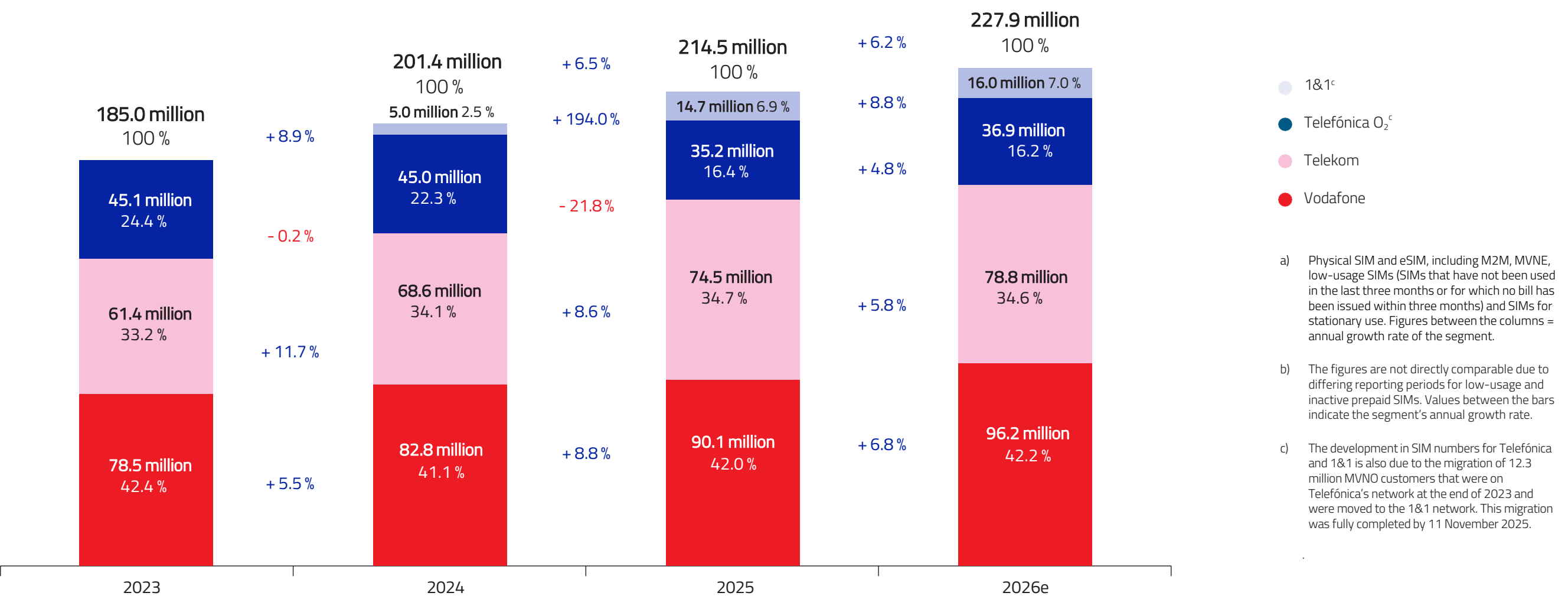
- FTTB/H-growth 1.7–2.0 million per annum
- Clear growth of connection broadband (also gives HFC a slight boost)
- Focus on homes-connected buildout and homes-activated marketing (satisfies citizens)
- Complete shutdown of numerous DSL connection areas before 2030

Section VI

Mobile Broadband

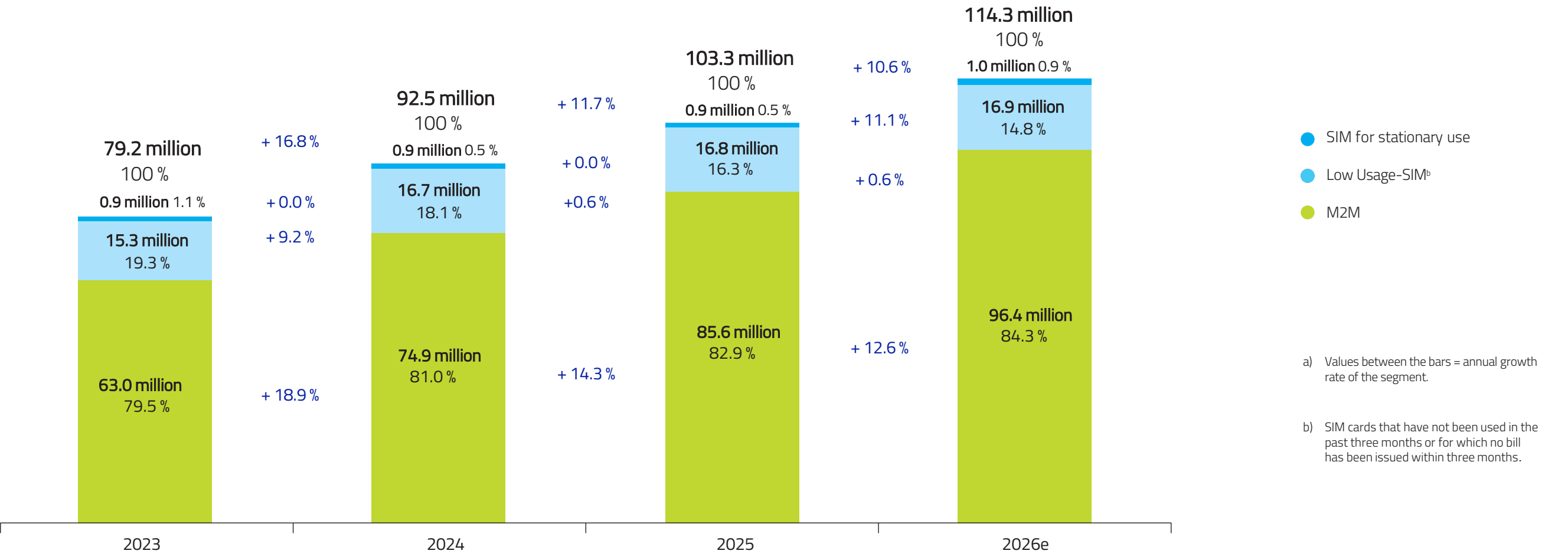
SIM card growth remains strong at 13.4 million – All mobile network operators can increase their number of SIM cards

Fig. 19: Number of SIM cards^a by mobile network^b
(Estimate for the end of 2026)



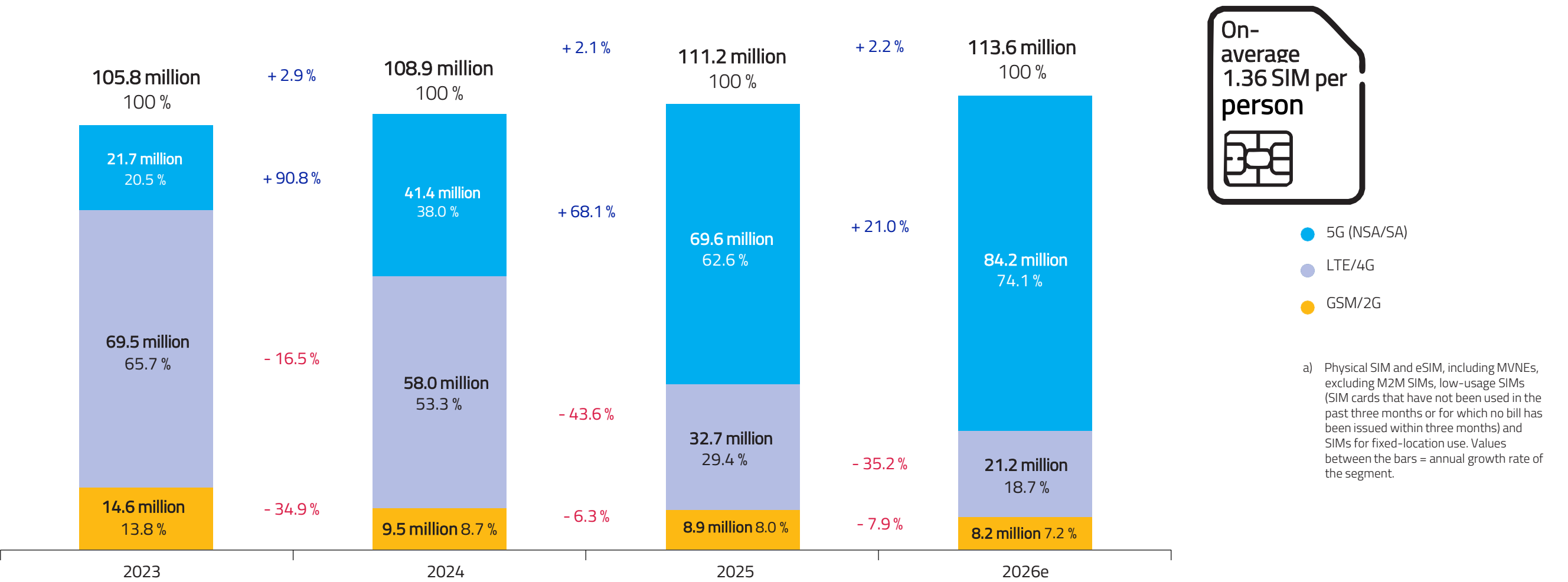
SIM growth in the mobile market continues to be driven by M2M applications – Fixed wireless access remains a niche use case in Germany

Fig. 20: SIM Cards^a by Type of Use
(Estimate for end of 2026)



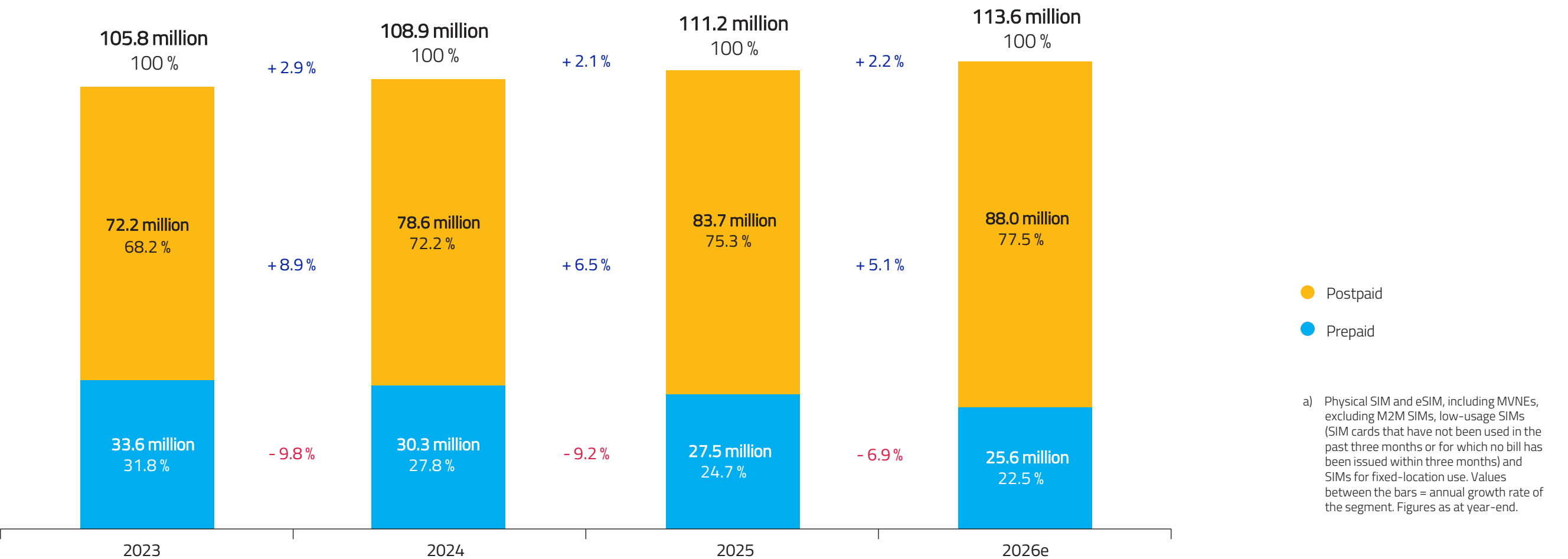
113.6 million SIM cards are actively used by people – Seven years after launch, 5G has reached large sections of the population

Fig. 21: Active^a personal SIM cards^b by network generation
(Estimate for end of 2026)



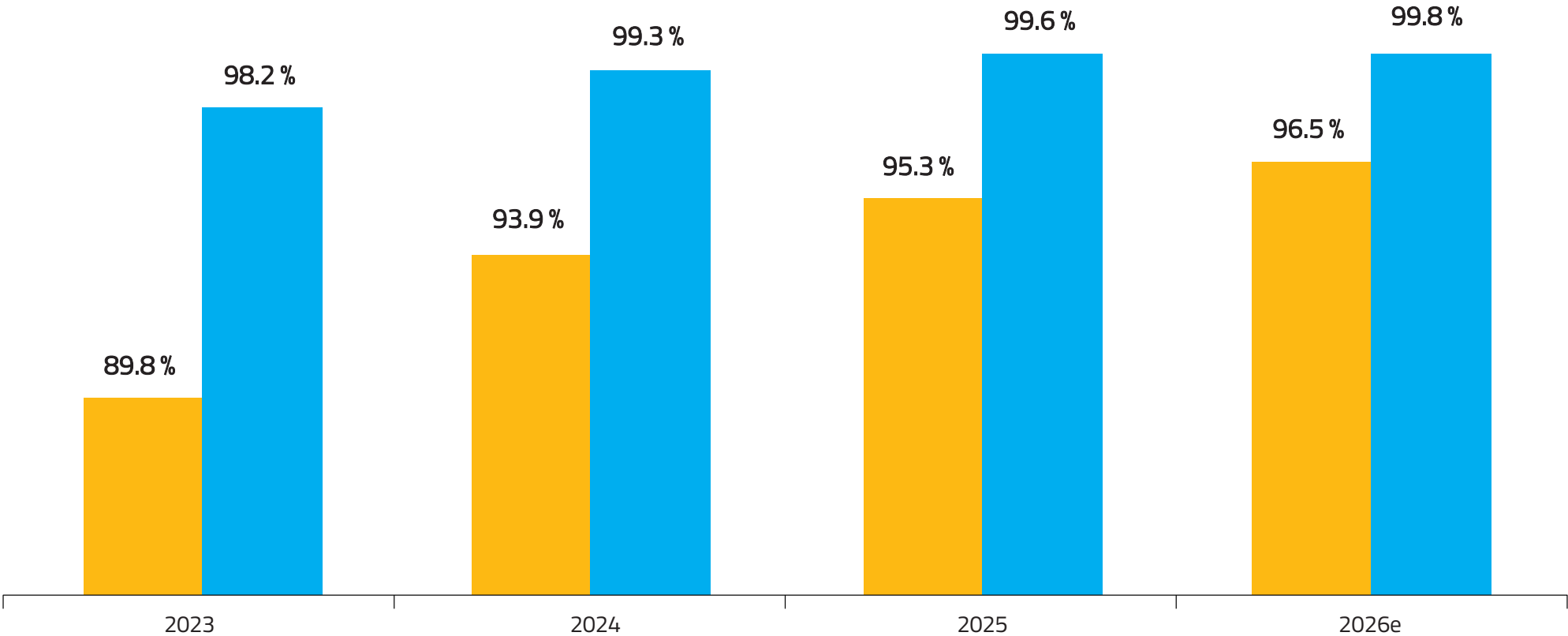
Due to constant data connections, postpaid contracts are becoming increasingly attractive among actively used personal SIM cards

Fig. 22: Active^a personal SIM cards by contract type
(Estimate for end of 2026)



Strong performance in network coverage: Mobile network rollout continues to make steady progress

Fig. 23: 5G Mobile Network Coverage^a
(Estimate for end of 2026)



Coverage obligations set by the Federal Network Agency (among others)

From 1 January 2030:
99.5% of the geographical area covered with at least 50 Mbit/s



- 5G geographical coverage
- 5G household coverage

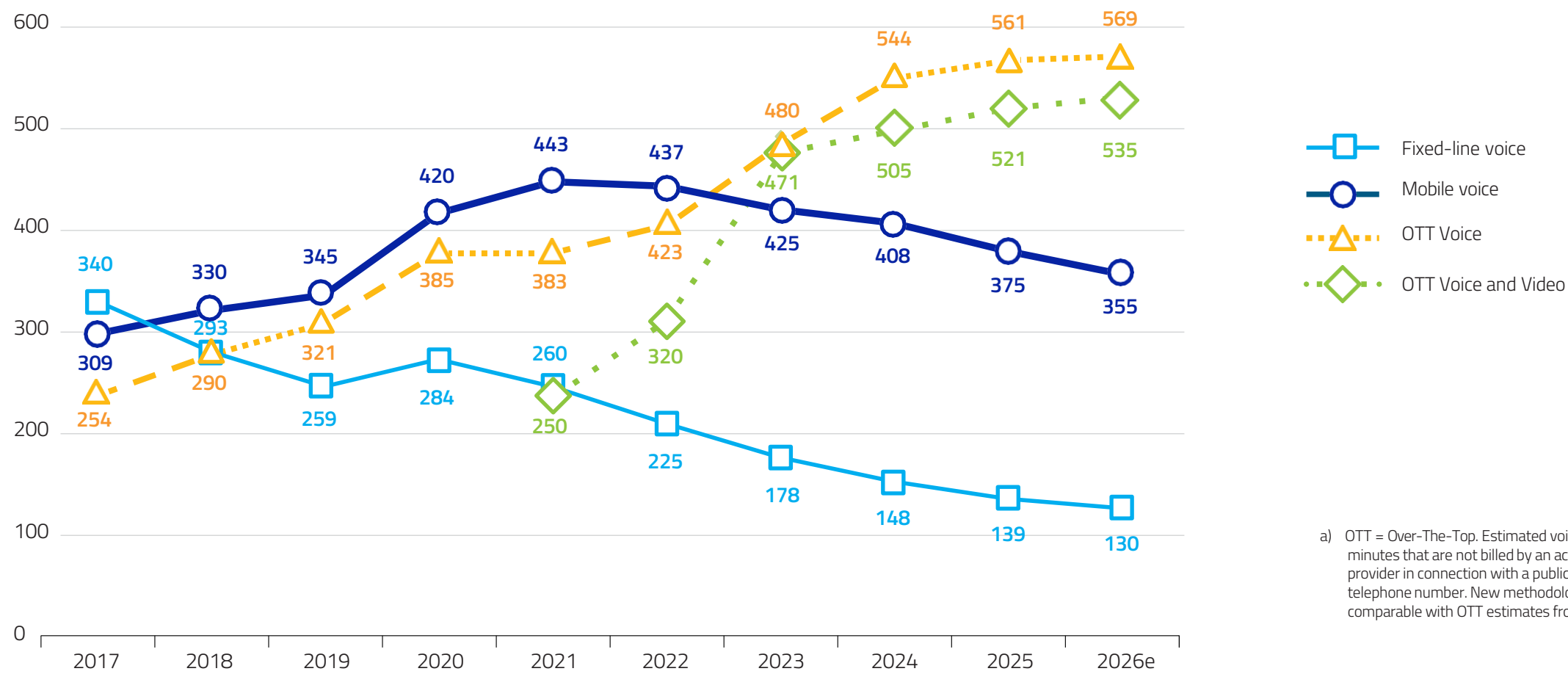
a) Outdoor coverage of the geographical area or households by at least one network provider

Section VII

Digital Services

Just over 30 % of outgoing voice call minutes come from traditional number-based voice services

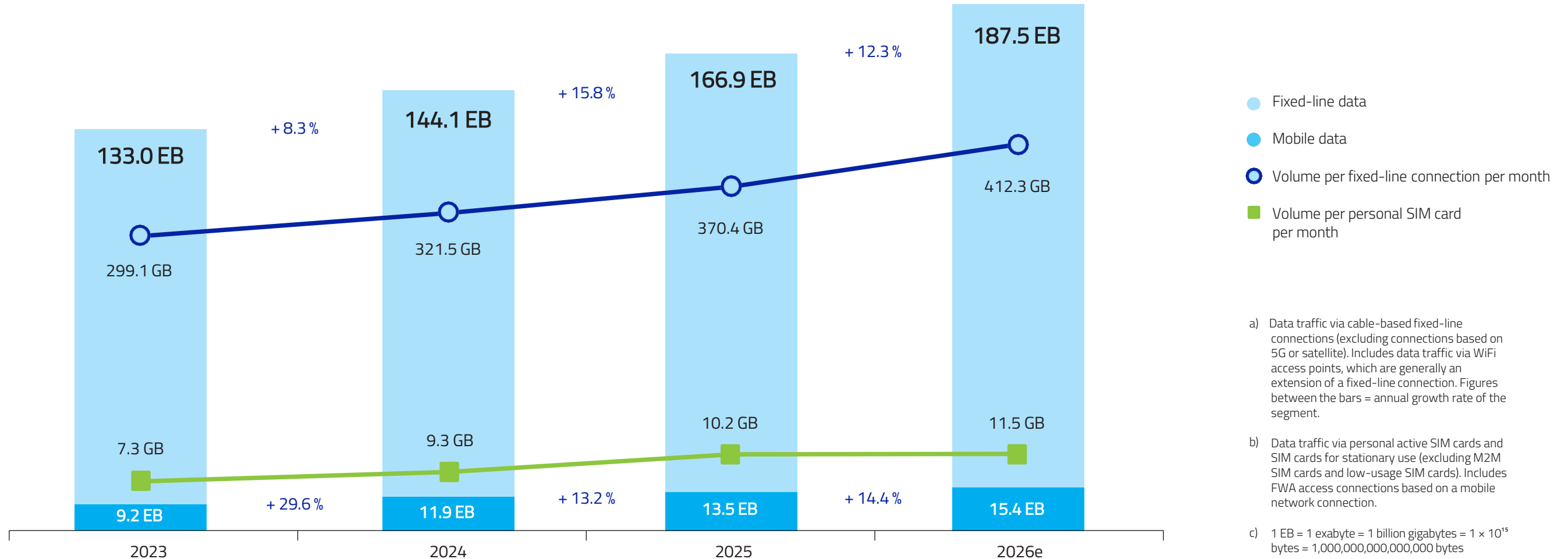
Fig. 24: Voice and Video Call Minutes from Fixed-Line, Mobile and OTT Applications^a
(in million minutes per day, estimate for end of 2026)



a) OTT = Over-The-Top. Estimated voice and video call minutes that are not billed by an access network provider in connection with a publicly assigned telephone number. New methodology; therefore, not comparable with OTT estimates from previous years.

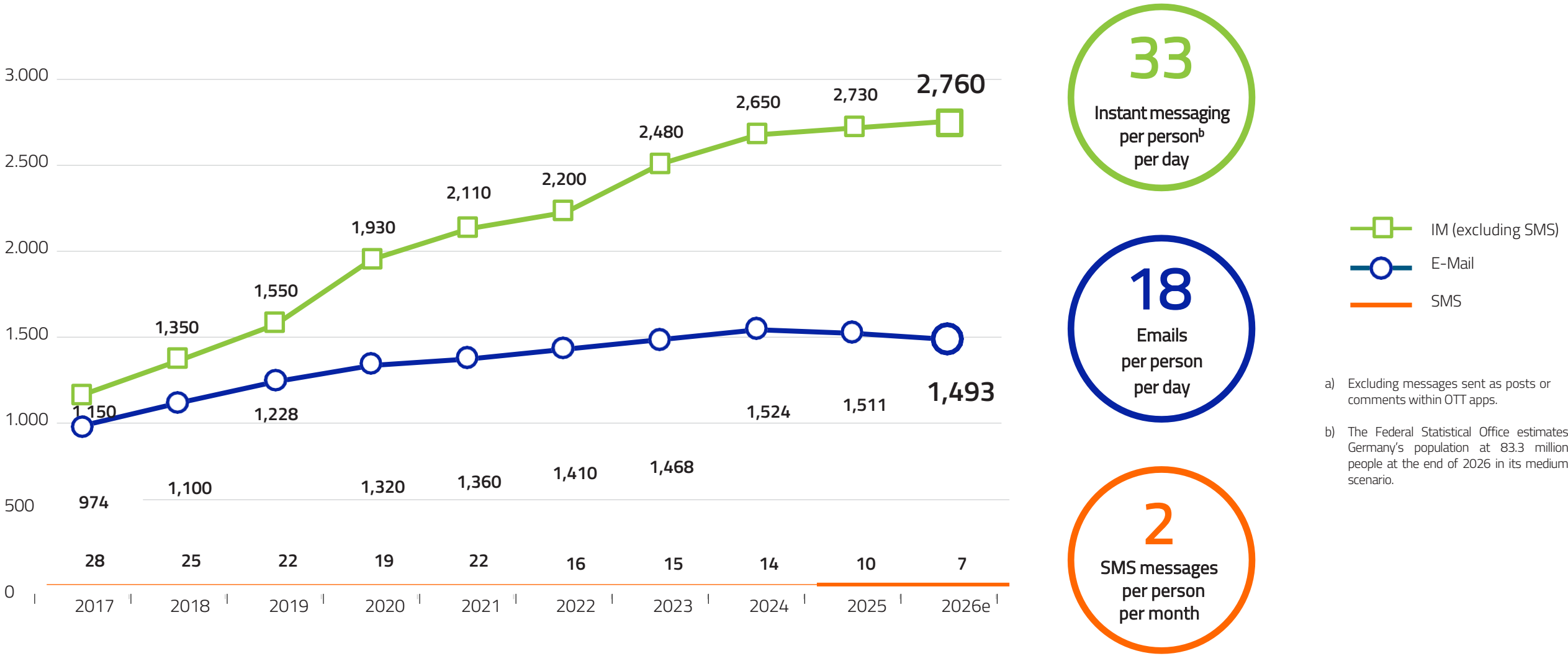
Unabated growth: Data volumes carried over fixed networks increase to 187.5 exabytes – 15.4 exabytes are transmitted over mobile networks

Fig. 25: Volume Trends in Broadband Internet Traffic – Fixed^a and Mobile Networks^b
(Estimate for end of 2026)



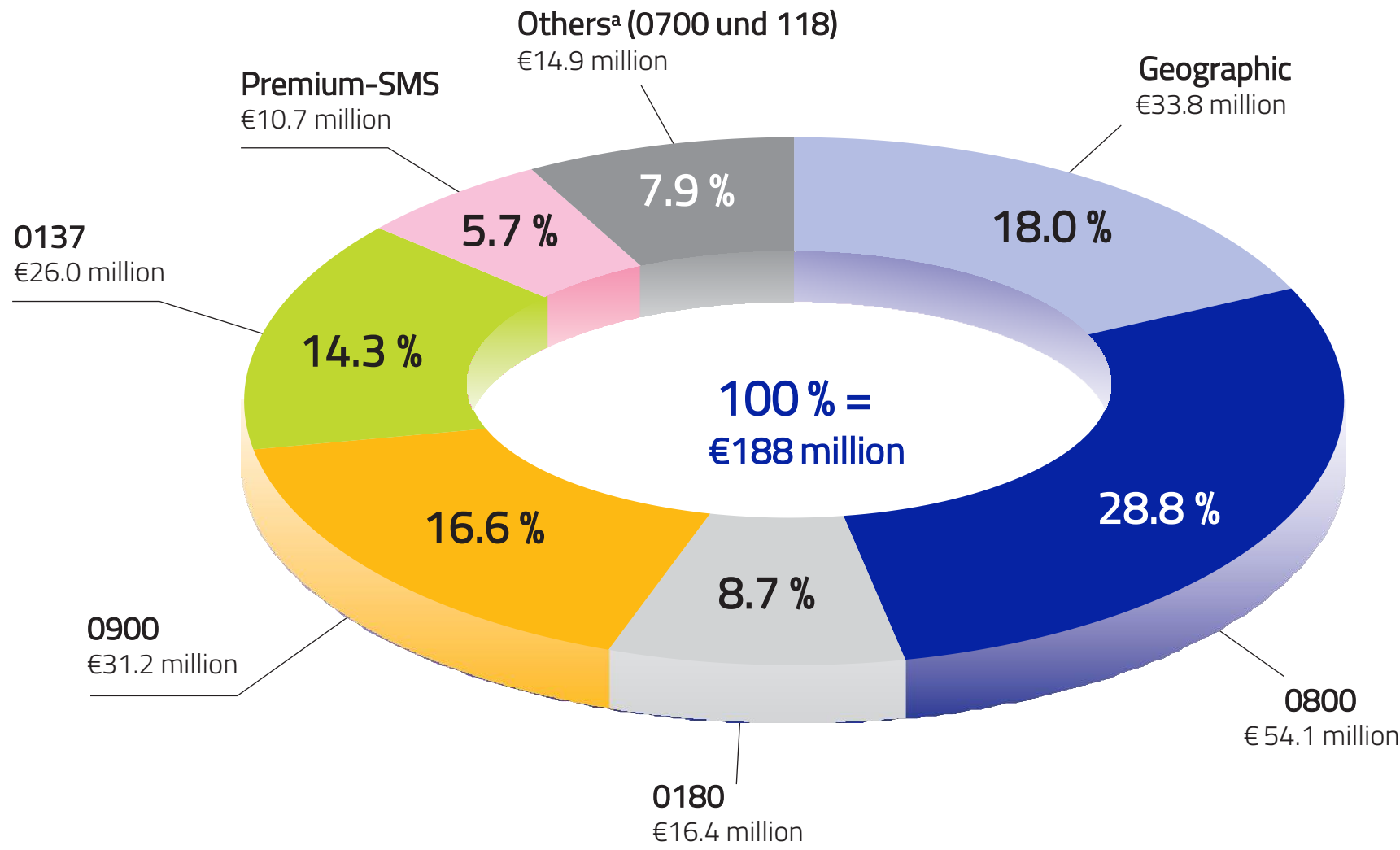
Personal messaging appears to have reached saturation point – Instant messaging is growing moderately and email usage is declining slightly

Fig. 26: Messages Sent via Fixed-Line, Mobile, and OTT Apps^a
(in millions per day)



Almost 50 % of revenue from service numbers is generated for the End customers by toll-free 0800 numbers and geographic telephone numbers

Fig. 27: Competitor Revenue from Service Numbers by Number Range
(Estimate for end of 2026)

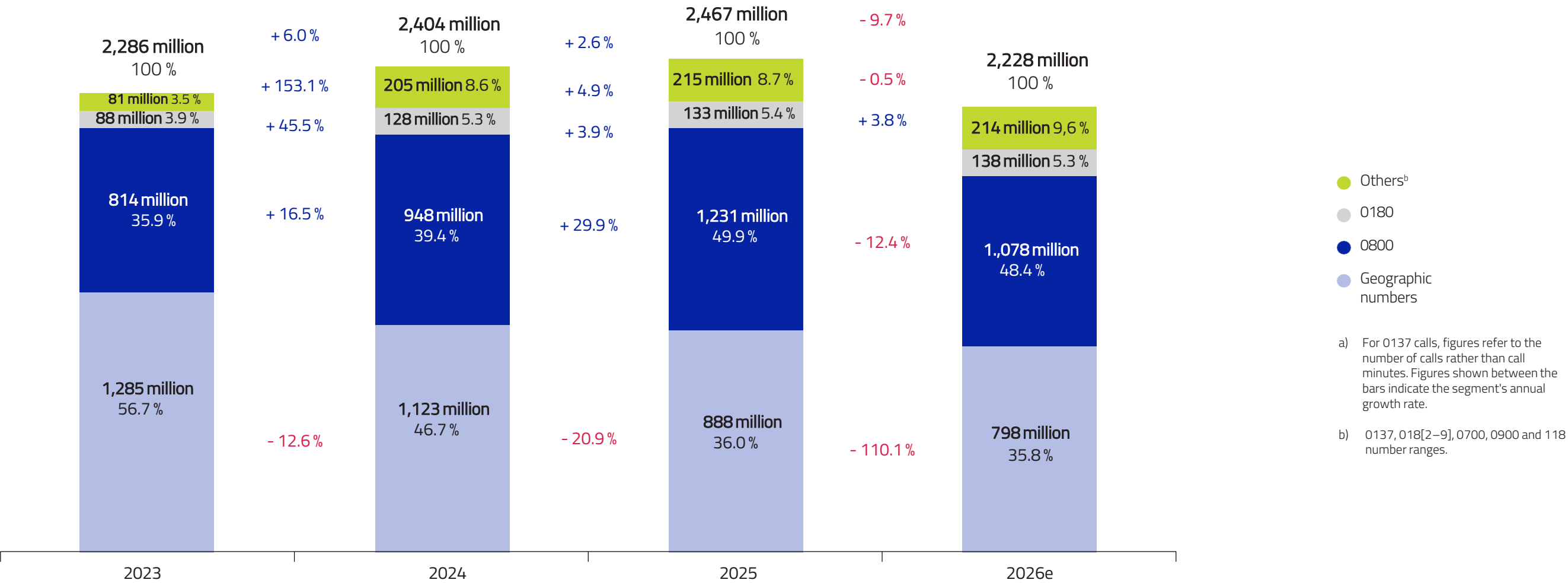


a) Numbers within the 0700, 018[2–9] and 118 number ranges.

Source: company data

Call minutes for service numbers will decline in 2026

Fig. 28: Competitor Minutes^a on Service Numbers by Number Type
(Millions of minutes per year, estimate for end of 2026)

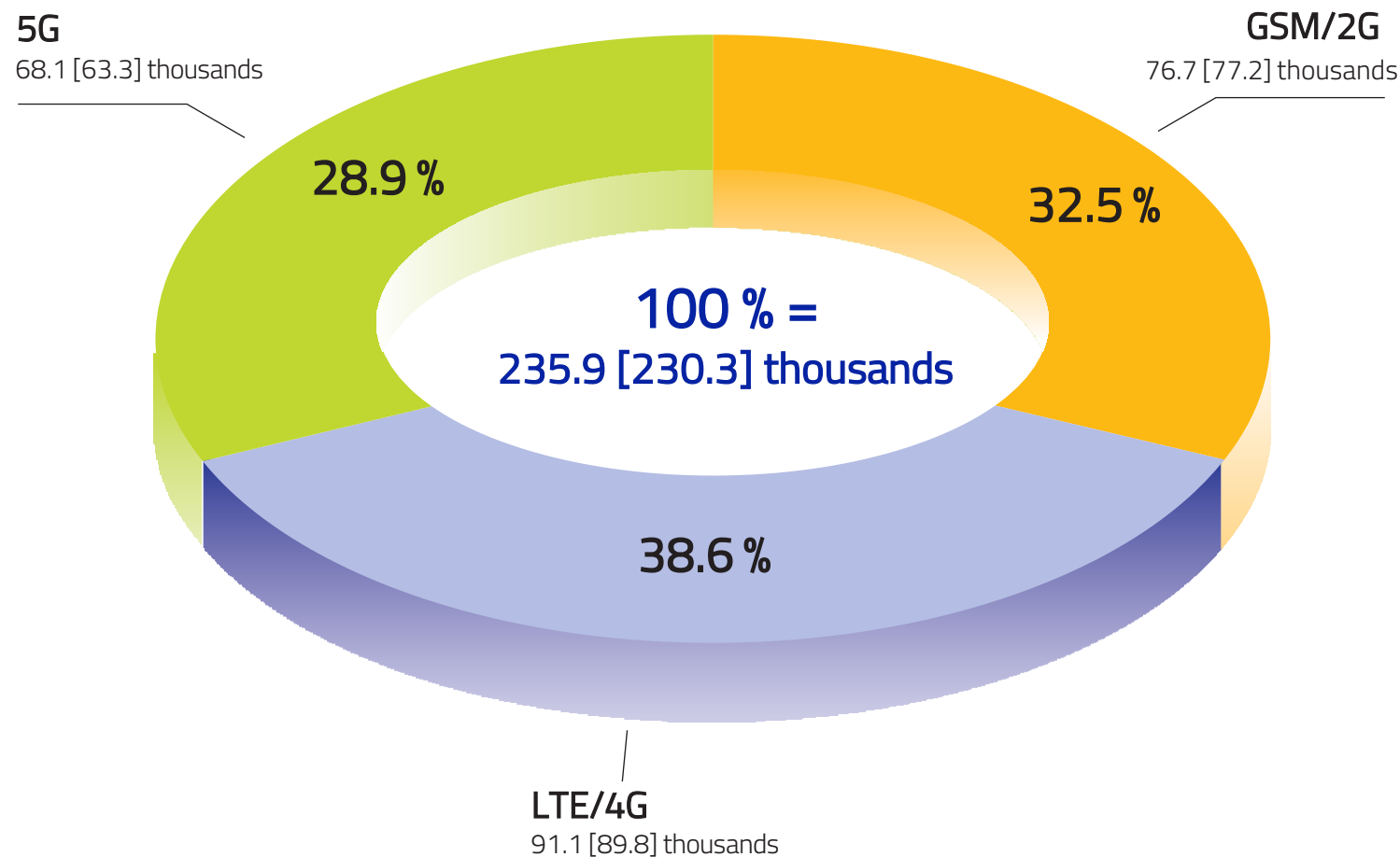


Section VIII

Telecommunications Infrastructure

The number of 5G base stations continues to increase – Competitors are expected to switch off their GSM networks by 2030

Fig. 29: Number^a of Mobile Network Base Stations by Technology
(Estimate for end of 2026)



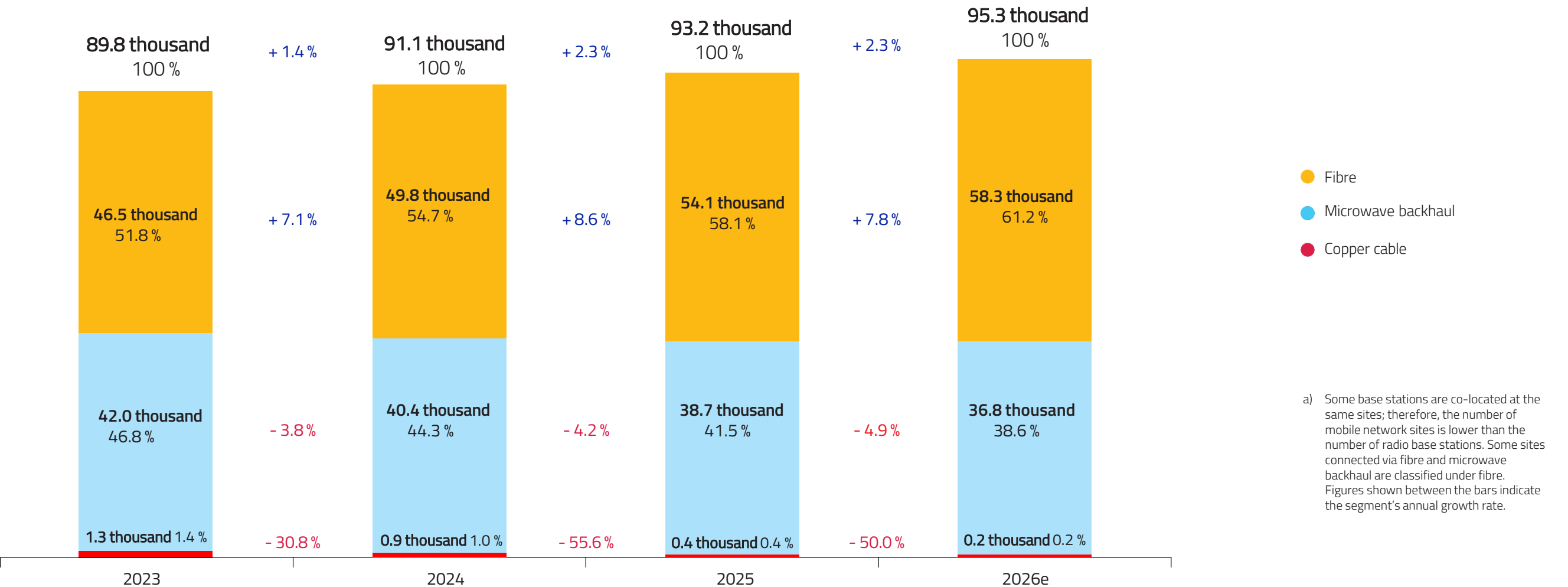
Expansion of the base station network

- Approximately 4,500 small cells in operation at the beginning of 2026
- 5,600 new base stations deployed in 2025
- Predominantly deployed as 5G Standalone (5G SA), enabling the full performance and capability benefits of 5G compared with LTE

a) Some base stations are co-located at the same sites; as a result, the number of mobile sites is lower. Actual figures are shown in square brackets for year-end 2025.

Mobile network operators continue to invest on an ongoing basis and have fibre-connected more than 60 % of antenna sites – Microwave backhaul remains important for remote locations

Fig. 30: Number^a of Mobile Network Sites by Backhaul Type
(Estimate for end of 2026)



a) Some base stations are co-located at the same sites; therefore, the number of mobile network sites is lower than the number of radio base stations. Some sites connected via fibre and microwave backhaul are classified under fibre. Figures shown between the bars indicate the segment's annual growth rate.

Appendix

FTTB/H key metrics

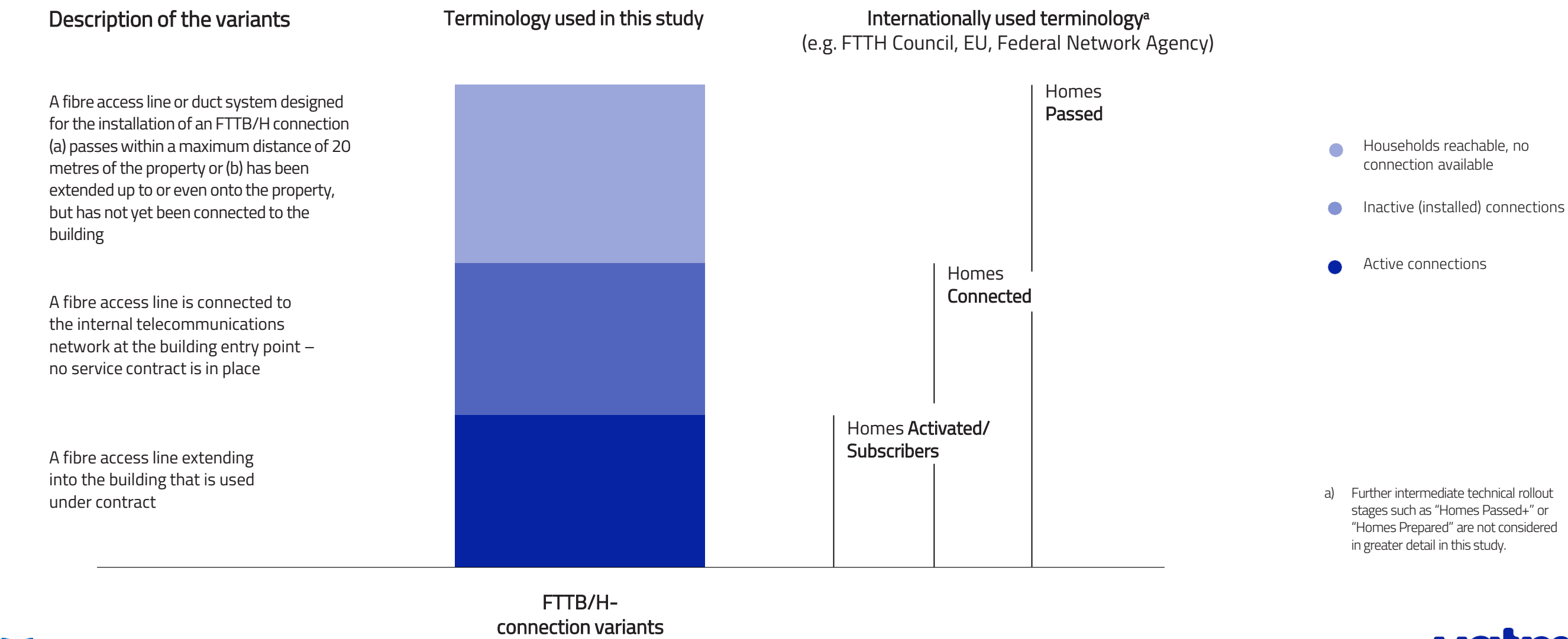
(as at year-end)

HP	8.9	13.0	16.9	21.1	26.6	32.0	
- Competitors	5.6	7.6	9.0	11.0	14.0	16.9	52.8 %
- Telekom	3.3	5.4	7.9	10.1	12.6	15.1	47.2 %
HP excluding HC	3.4	6.5	9.3	12.3	16.1	19.5	
- Competitors	1.8	3.0	3.7	5.3	6.9	8.2	
- Telekom	1.6	3.5	5.6	7.0	9.2	11.3	
HC	5.5	6.5	7.6	8.8	10.5	12.5	
- Competitors	3.8	4.6	5.3	5.7	7.1	8.7	69.6 %
- Telekom	1.7	1.9	2.3	3.1	3.4	3.8	30.4 %
HC excluding HA	2.9	3.1	3.4	3.6	4.1	4.7	
- Competitors	1.7	1.9	2.1	2.0	2.8	3.6	
- Telekom	1.2	1.2	1.3	1.6	1.3	1.1	
HA	2.6	3.4	4.2	5.2	6.4	7.8	
- Competitors	2.1	2.7	3.2	3.7	4.3	5.1	65.4 %
- Telekom	0.5	0.7	1.0	1.5	2.1	2.7	34.6 %
Reach rate HP	19.5 %	28.4 %	37.0 %	46.2 %	54.3 %	70.0 %	
Coverage HC	12.0 %	14.2 %	16.6 %	19.3 %	21.7 %	27.4 %	
Take-up-Rate	29.2 %	26.2 %	24.9 %	24.6 %	24.6 %	24.4 %	
- Competitors	37.5 %	35.5 %	35.6 %	33.6 %	33.6 %	30.2 %	
- Telekom	15.2 %	13.0 %	12.7 %	14.9 %	15.9 %	17.9 %	
	2021	2022	2023	2024	2025	2026e	

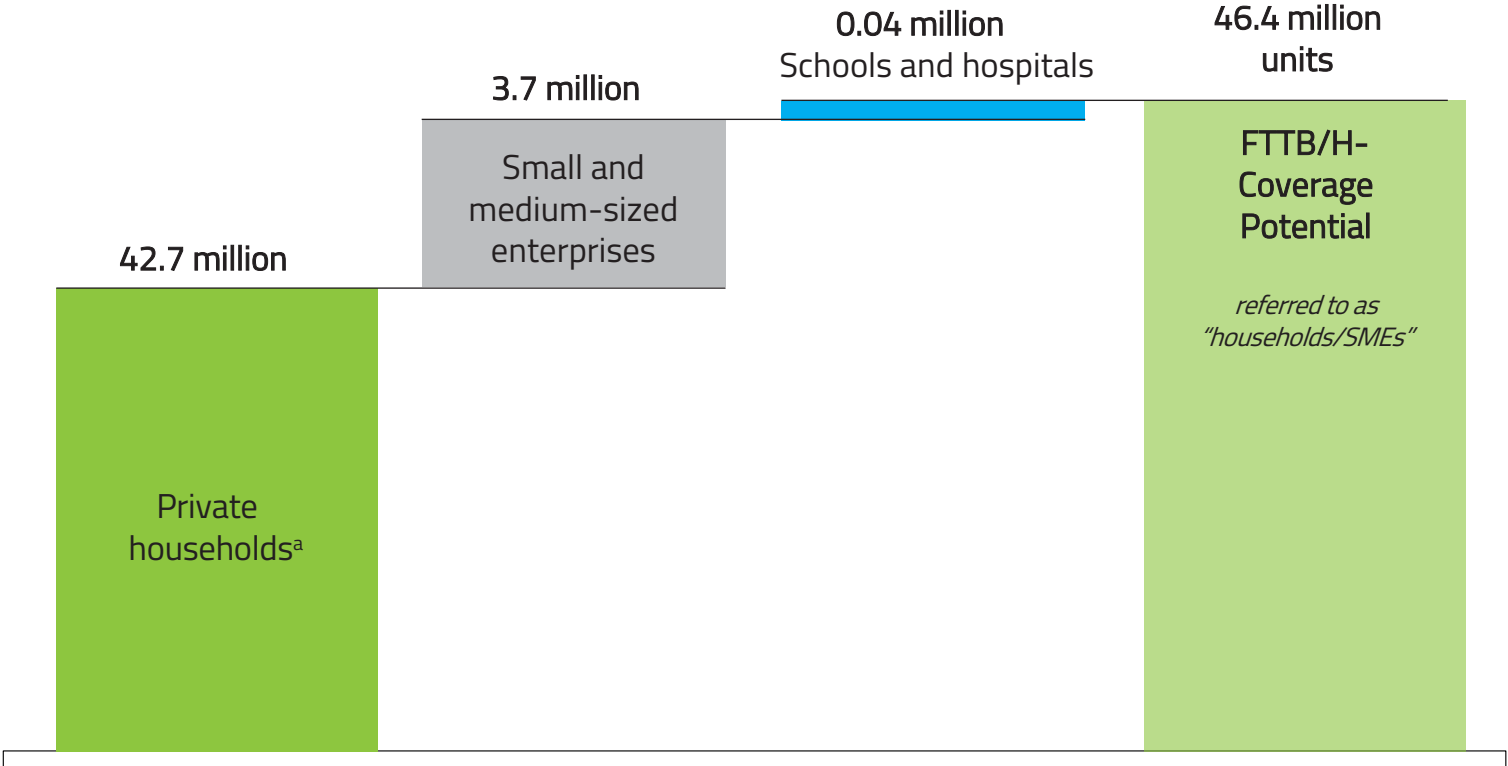
Source: company data

Terms and Definitions

Fig.: Definitions of FTTB/H reach metrics



Source: Federal Statistical Office of Germany



Explanation:
In addition to private households, small and medium-sized enterprises (SMEs), schools and hospitals are also potential users of FTTB/H connections – large enterprises and public authorities are already served by dedicated fibre connections

a) Primary and secondary residences.

Glossary of Abbreviations

BIL	Nationwide information system for line network research	Gbit	Gigabit	SA	Stand alone 5G
BMDV	Federal Ministry for Digital and Transport	GB	Gigabyte	SIM	Subscriber Identity Module Short
BNetzA	Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railway	HFC	Hybrid Fiber Coax	SMS	Message Service
BWA	Broadband Wireless Access	IM	Instant Messaging	LL	Local Loop
DOCSIS	Data Over Cable Service Interface Specification	SME	Small and medium-sized enterprises	VDSL	Very High Speed Digital Subscriber Line
e	Estimated	LTE	Long Term Evolution		
EB	Exabyte	M2M	Machine-to-Machine		
EU	European Union	Mbit	Megabit		
FTTB	Fiber-to-the-Building	M	million		
FTTH	Fiber-to-the-Home	MVNE/O	Mobile Virtual Network Enabler/Operator		
FTTC	Fiber-to-the-Curb	VAT	Value Added Tax		
		OTT	Over-The-Top		
		NSA	Non stand alone 5G		
		s	Second		