

Press release

ANNUAL REPORT

Arcep publishes its annual report and delivers a progress report on its strategic roadmap

Paris, 9 July 2019

Highlights of Arcep's work and actions in 2018

Publication of the report "Smartphones, voice assistants... Are devices the weak link in achieving an open internet?"

The report's dissemination helped raise awareness across Europe of the need to guarantee greater freedom of choice for users. The annual report being published today includes [a map](#) of Arcep Executive Board and team members' many appearances in Europe and beyond, to talk about this issue and possible responses.

The fruits of pro-investment regulation

Through the size of their investments in fixed and mobile infrastructures (9.8 billion euros in 2018), operators demonstrated that they could meet French people's expectation of nationwide access to competitive infrastructures. Fibre rollouts and ubiquitous 4G access are becoming a reality for a growing number of our fellow citizens.

5G roadmap and pro-innovation regulation

To undergird the advent of 5G, in July 2018 Arcep published its [work programme](#), which is part of the national [roadmap](#) for 5G, detailing the roadmap's stages and timeline. Releasing frequencies for trials and experiments helped produce a clear idea of requirements, and to identify the first use cases.

Inauguration of Arcep's new offices

Arcep inaugurated its new offices, located on rue Gerty Archimède in the 12th arrondissement of Paris, in late 2018, with special guests Mrs Pannier-Runacher, Secretary of State to the Minister of Economy and Finance, and Mr Yvon Collin, Senator and President of the High Commission for Digital and Postal Affairs, as well as several members of Parliament. Thanks to more open and collaborative work spaces, these new offices reflect Arcep's dedication to being a "liberated governmental organisation" and mark a new stage in its strategic shift.

Arcep's strategic roadmap put into action

In January 2016, Arcep presented the conclusions of its strategic review in the form of four pillars of action, three new regulatory methods and twelve strategic priorities, which have guided its work ever since. After three years of concrete implementation, now comes the time for the first evaluations.

Actions and progress report on the four pillars of the strategic roadmap:

1. *Investment in infrastructures*

- **Operators' investments: a record 9.8 billion euros in 2018**

In 2016, Arcep unveiled its pro-investment doctrine, and the regulatory actions required to implement it. At the heart of it: creating a virtuous circle that leverages competition to incentivise operators to invest in infrastructure, which in turn drives the monetisation of those efforts. Three years later, on 21 May 2019 Arcep presented the results to the financial news media and financial analysts, at its annual Telconomics event: operators invested 9.8 billion euros (excluding spending on frequencies) in 2018, which marks a 40% increase over the past four years.

- **Fibre: implementing market analysis to get every operator on board**

The implementation of the (5th round) of market analysis sets out the conditions to ensure that every stakeholder participates in the push to deploy fibre. Arcep has supported the sector by creating a regulatory framework that encourages network sharing, guaranteeing third party operators' access, and promoting investment. In particular, Arcep conducted a detailed technical and IT audit of Orange's operational processes for providing access to its FTTH networks, to ensure they did not discriminate against other operators. And to facilitate rollouts, Arcep imposed new obligations on Orange regarding access to its infrastructures (civil engineering, overhead installations). Arcep's regulation also seeks to vitalise the business market by increasing competition in the active wholesale market.

2. Connected territories

- **New Deal for Mobile: an unprecedented initiative to achieve new connectivity targets**

An historic agreement between the Government, Arcep and operators, the New Deal for Mobile is a collective drive to make up for France's lost time in achieving 4G coverage. After having made a substantial contribution to this paradigm shift in 2017, Arcep wrote these new obligations into operators' frequency licences, to render them legally binding. Anyone can track the progress being made with deployments through the [regularly updated New Deal scorecard](#) on the Arcep website.

- **Universal fixed telephone service**

Alerted by a large number of users and local authorities, and having observed a deterioration in the quality of Orange's universal fixed service, Arcep issued the operator with a formal notice to comply with its obligations. To enable a rapid and lasting improvement of the situation, the notice imposed a series of quarterly targets on Orange.

- **Superfast access: Arcep's opinion on operators' coverage in more sparsely populated areas covered by private initiative (AMII)**

The Government referred to Arcep for an opinion on the legally binding commitments proposed by Orange and SFR, which consisted of deploying FTTH in the more sparsely populated areas covered by private initiative (those parts of the country where the Government has issued a call for investment letters of intent, called "zones AMII" in French). Arcep published its two opinions, in which it welcomes the operators' proposed commitments that seek to have the entire "zone AMII" eligible for fibre access by the end of 2020. These opinions nevertheless also include some reservations, and highlight several points that warrant special attention. In those parts of the country covered by government-supported rollouts, Arcep's guidelines on pricing public initiative networks (PIN) have managed to create an environment of clear and stable pricing, which is conducive to attracting commercial operators to these PIN. To complete the regional toolkit for ensuring broadband and superfast broadband coverage, Arcep has also made new frequencies available to local authorities, by creating a superfast wireless allocation window.

- **"Mon réseau mobile": the heavy dose of transparency expanded to include French overseas markets**

Arcep has required every operator to produce new coverage maps that create a distinction between four levels of coverage: very good, good, limited and none, for both voice and texting services. In September 2017, Arcep launched [monreseau mobile.fr](#), a map-based site that allows users to compare operators' performance in a specific location, with an accuracy of up to 50 metres. So a heavy dose of transparency that was extended to France's overseas territories in 2018.

3. Open Internet

- **Net neutrality and Quality of service**

Net neutrality's vigilant watchdog in France, Arcep launched a co-construction approach with the ecosystem's stakeholders in 2018: a vast initiative devoted to measuring internet quality of service on fixed lines. This work led to the specification of an API, an "access ID card" designed to be installed in operators' boxes and accessible to measuring tools. In late 2018, Arcep also announced the availability of the [Wehe](#) app, which comes to complete the set of tools being mobilised to detect online practices that could undermine access to an open internet. The 56,000 tests performed on [Wehe](#) in 2018 helped establish a relatively positive snapshot of the state of net neutrality in France.

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- **Devices (smartphones, voice assistants...), weak links in achieving an open Internet: putting theory into practice**

After conducting an in-depth and unprecedented investigation into the ways in which devices and the open Internet, and the publication of a report submitted to France's Secretary of State for Digital Affairs, Arcep continued to work on furthering discussions on the ways in which devices influence our freedom of choice on the Internet. While bringing this issue to the attention of many precincts in France, in Europe and around the world, Arcep also moved from theory to practice with the publication of [two tutorials](#) on its website: the goal is to help users deal with any restrictions they may encounter to making full use of their smartphone.

4. *A pro-innovation prism*

- **5G: making room for pilots, trials and experiments**

To help pave the way for 5G, in early 2018 Arcep opened a 5G pilot window for assigning frequencies to stakeholders wanting to perform full-scale 5G pilot trials (ports, hospitals, connected roadways...) and begin planning their future business models. A call for open platforms in the 26 GHz (mmWave) band was also issued. A [snapshot of these 5G trials and experiments](#) is available on the Arcep website.

- **E-commerce: transparency on cross-border parcel delivery information**

The European regulation on cross-border parcel delivery gave Arcep new responsibilities. The goal is to foster greater transparency on parcel operators, the products available in the marketplace and their prices, for the benefit of both consumers and businesses. The ultimate aim is to make parcel delivery in France and Europe more affordable and more efficient, to support the development of e-commerce.

Arcep's 2018 milestones on the three new forms of regulatory intervention, identified in the strategic roadmap:

1. *Building data-driven regulation*

“Mon réseau mobile”: new impetus to better reflect realities in the field

To satisfy the needs of the regions, Arcep gave [renewed impetus](#) to its data-driven regulation and openness to crowdsourcing, and announced three new actions for measuring mobile coverage and quality of service. A “regulator’s toolkit” was made available to local authorities to enable them to perform tests in a controlled environment, to supplement Arcep’s own measurements. A Code of Conduct was drafted for players involved in crowdsourced testing and measurement. And a new version of “Mon réseau mobile” will soon incorporate all of the field measurements produced by Arcep, local authorities and other Code compliant parties.

“J’alerte l’Arcep”: empowering users, keeping the regulator informed

Open to consumers, local authorities and businesses alike, this reporting platform that launched in October 2017 allows anyone to inform Arcep of any malfunctions they have encountered in their relationship with their fixed, mobile or postal operator. One year after it launched, Arcep presented its first scorecard: the Authority received close to 34,000 reports in a single year, close to five times the number it received in the years before launching “J’alerte l’Arcep”. Arcep also provided details on several concrete issues raised by users, and the measures it was taking to remedy them: in some instances solutions as simple as “making a single phone call”, while others required the Authority to make use of its repressive arsenal.

2. *Co-constructing regulation*

Users, operators, enterprises and start-ups, local authorities, parties involved in testing and measuring fixed and mobile quality of service, the economy’s vertical industry players: Arcep has worked to develop **forums for dialogue** with each, to obtain feedback from all and so work together on constructing regulation. The “Connected Territories” workshops in particular give Arcep an opportunity to take the pulse of local authorities’ needs on a regular basis. 2018 was also marked by the formalisation of the regular dialogue with other regulatory authorities (Competition Authority, AMF, Arafar, CRE, CNIL, and CSA) on best practices and new approaches to regulation in the digital era.

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3. *Serving as a neutral expert in digital and postal affairs*

Arcep issued two opinions to the Government in 2018, on operators' proposed fibre rollout commitments in medium density areas covered by private initiative. In accordance with the "Audiovisual" Act, Arcep rendered its opinion to the Competition Authority on the digital revolution's impact on audiovisual media, by formulating three proposals to keep pace with the changes at work. As part of a bill on military programming, Arcep issued an opinion to the Secretariat-General for National Defence and Security on information systems' security and defence mechanisms.

A three-volume annual report: three facets of Arcep's actions

For the second year in a row, and in accordance with the Independent Authorities Act (*Loi sur les Autorités administratives indépendantes*, AAI) adopted in January 2017, Arcep publishes its annual report in three volumes:

[Volume 1 "Arcep and regulated markets"](#) provides an update on Arcep's responsibilities, and the actions and decisions carried out in 2018. It also details Arcep's European and international activities, which have contributed to the building of Europe and the promotion of French telecoms regulation.

[Volume 2 "Regulation in support of connected territories"](#) is devoted to Arcep's actions in support of regional connectivity. This document is addressed to elected officials, local authority and operator representatives, and was published to coincide with the plenary conference that Arcep hosted for them in March 2019.

[Volume 3 "The State of the Internet in France"](#) complies with European Open Internet Regulation which requires Arcep, and all national regulatory authorities, to publish an annual report on their audits of net neutrality and their findings. This report also complies with the obligation set out in the Independent Authorities Act for Arcep to include "*issues relating to neutrality and the use of IPv6 technologies*" in its annual report". Published on 27 June 2019, it was presented to the media and digital ecosystem experts at a dedicated press conference.

Associated documents:

- [Editorial by Arcep's Director-General, Cécile Dubarry](#)
- [2018 milestones](#)
- [Arcep's 2019 annual report](#)
- [Progress report on the 12 priorities of the strategic roadmap](#)
- [Map of Arcep's appearances connected to the report, "Are devices the weak link in achieving an open internet?"](#)

Arcep at a glance

The Electronic Communications and Postal Regulatory Authority (Arcep), a neutral and expert arbitrator with the status of independent administrative authority, is the architect and guardian of internet, fixed and mobile telecoms and postal networks in France.

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