

Press release

ANNUAL REPORT

Arcep publishes its annual report

Paris, 18 July 2022

Arcep is publishing its annual report: [“Arcep and regulated markets” \(volume 1\)](#).

What were the highlights of Arcep’s work and actions in 2021?

Environmental issues: a full-fledged regulatory chapter

When appointed by the President of the Republic as the new Arcep Chair in January 2021, Laure de La Raudière stressed what a vital part environmental issues played in the Authority’s regulatory actions, and stated her ambition to combine the growing use of digital technology and reducing its environmental footprint. In 2021, [the Government’s “Digital and the Environment” roadmap](#), along with newly adopted legislation, gave Arcep new tasks and powers, by expanding its data collection purview. As a result, in April 2022, the Authority published the [inaugural edition of its annual “Achieving digital sustainability” inquiry](#) into the country’s four main telecoms operators, to track the evolution of their environmental footprint. Arcep also worked in collaboration [with ADEME on measuring the digital environmental footprint in France](#) and with Arcom through two authorities’ [the joint digital division](#).

Arcep serving as a driving force at the European level

Arcep Executive Board member, Emmanuel Gabla, was elected [Vice-chair](#) of the Body of European Regulators for Electronic Communications (BEREC) for 2022. Arcep helped create a working group devoted to sustainability, co-chaired by Arcep policy officer, Sandrine Elmi Hersi. In keeping with its [work on “achieving digital sustainability”](#), Arcep contributed to BEREC’s work on the digital environmental footprint, which culminated in the publication of an initial [report in June 2022](#). The transposition of the European Electronic Communications Code in May 2021 also gave Arcep newfound powers, including the regulation of new over-the-top (OTT) providers who market calling and instant messaging services, and updating the universal electronic communications service, to keep pace with the population’s changing consumption habits.

Investments continued to surge in 2021

Operators continued to invest heavily in 2021: 14.9 billion euros (excluding spending on frequencies) which marks a more than 10% increase YoY. Back in the black after 10 straight years of losses, operators’ retail market revenue rose by 2.5% in 2021, thanks chiefly to the mobile market. During its [“Telconomics” press conference](#) on 24 May, Arcep presented its annual observatory, which gathers all of the key economic data on France’s telecoms market, along with the fixed and mobile services price index for 2021.

Arcep working on consumers’ behalf

In 2021, Arcep received more than 38,000 user reports (14% YoY), primarily from consumers (92%) – the vast majority of which concerned the telecoms sector, and fixed services in particular. Network quality of service remained the main source of complaints from users, even if overall satisfaction with fixed and mobile operators increased slightly. On 11 May 2022 [Arcep presented the annual scorecard](#) for its customer satisfaction observatory and its [“J’alerte l’Arcep” reporting platform](#).

Optical fibre: an action plan to improve the quality of operations and connections

Fibre to the Home (FttH) networks are on their way to becoming the new fixed infrastructure of reference in France. Improving the quality of their operation remains a top priority for Arcep. Responding to the issues that users have encountered (line disconnected when a new subscriber is added, dilapidated street cabinets,

temporary cut-offs, connection issues...), Arcep continued to work on remedying these problems, notably via the “FttH Operations” working group. In November, it adopted a supplementary action plan for operators, with three core strands: better monitoring of service calls, closer monitoring of compliance with processes by limiting the number of sub-contractors and increasing training of service technicians, and bringing the most dilapidated infrastructures up to code.

Nationwide 4G access and pioneer 5G rollouts: transparent monitoring tools

Operators continued their rollout efforts as part of the New Deal for Mobile: by the end of 2021, 1,224 sites deployed under the targeted coverage scheme were in service for all four operators. Starting in November 2020 and over the course of 2021, France’s four mobile network operators also opened the first 5G-ready sites commercially. At the same time, Arcep created its [observatory of 5G and 4G+ deployments](#). This observatory comes to complement the other tools that Arcep makes available to local authorities and users: “[Mon réseau mobile](#)” and the [New Deal for Mobile dashboard](#).

Mobile network sharing: Arcep documents network sharing levels in Metropolitan and Overseas France as of 1 January 2022

Mobile network sharing consists of having several operators share all or a portion of the equipment that makes up their mobile networks. Following the adoption of the “REEN” Act on reducing the digital environmental footprint, on 15 November 2021, Arcep is required to include an account of the level of active and passive telephony infrastructure sharing in France, in its annual report. On 1 January 2022, 28.7% of all shared sites in France were shared with four operators.

Frequency awards in Réunion and Mayotte

The principal auctions for the assignment of 700 MHz band frequencies in Réunion and in Mayotte were held in December 2021. [Arcep was able to award](#) the winning candidates’ licences to use frequencies in the 700 MHz and 3.4 – 3.8 GHz bands in Réunion, and in the 700 MHz and 900 MHz bands in Mayotte in late May 2022.

Arcep continues the work of regulating press distribution

Arcep’s proposal of specifications for approving authorised press distributors was adopted by the Government. Published on 13 April 2021, these specifications focus heavily on serving the interests of readers, to ensure they have broad, nationwide access to a diverse and high-quality selection of print media titles, at an affordable price, and on modernising press distribution. Following the launch of an authorisation process for press distributors, Arcep approved the firms France Messagerie and MLP on 24 June and 14 December 2021, respectively. Another highlight was the formalisation of an agreement between the sector’s players on point-of-sale assortment and issue quantities.

New duties for Arcep in the postal sector

In 2021, Parliament entrusted Arcep with new duties, including assessing the net cost of fulfilling the public service mandate of postal transport and distribution of the press, and of providing the universal postal service. In December, Arcep published its [mail and parcel observatory](#): the Covid-19 crisis accelerated the structural decline of the market for addressed mail distributed in France and abroad, whereas the parcel delivery market continued to grow. Postal distribution of the press to subscribers has decreased.

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

In accordance with the Independent Authorities Act (*Loi sur les Autorités administratives indépendantes*, AAI) adopted in January 2017, Arcep is publishing its 2022 report in three volumes:

[Volume 1 “Arcep and regulated markets” being published today](#) provides an update on Arcep's responsibilities, and the actions and decisions carried out in 2021. It also details Arcep's European and international activities, which have contributed to the construction of European regulation, and the global outreach of French telecoms regulation.

[Volume 2 “Regulation in support of smart 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 on 31 March 2022. It will be presented at the annual “Connected Territories” conference on 22 September 2022 (by invitation only).

[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 net neutrality monitoring actions, along with 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 addressing technologies*” in its annual report. Published on 30 June 2022, it was presented to the media and digital ecosystem experts at a dedicated press conference that same day. Since 2020, it has included a chapter devoted to incorporating environmental issues into regulation.

Associated documents:

- [Volume 1 of the annual report: “Arcep and its regulated markets” 2022 edition](#)
- [Key figures for the telecoms sector, the postal sector and the press distribution sector](#)
- [Arcep 2021 milestones](#)
- [Arcep's “Achieving digital sustainability” highlights and publications](#)
- [Arcep fieldnotes](#)
- [All three volumes of the Arcep annual report](#)

Arcep at a glance

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

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