

Press release

ANNUAL REPORT Volume 1

Arcep publishes its “Arcep and regulated markets” report

Paris, 20 June 2024

Today, Arcep is publishing **Volume 1 of its annual report, “Arcep and regulated markets”**, providing a detailed update on Arcep’s responsibilities, and the actions and decisions carried out in 2023.

Volume 2, “Arcep and connected territories”, [published on 11 June](#), examines in more detail Arcep’s regional digital development actions: monitoring operators’ compliance with their fibre rollout and fixed network QoS obligations, overseeing the management of the Orange legacy copper network switchoff, ensuring nationwide 4G access and operators increasing the pace of 5G deployments.

What were the highlights of Arcep’s work in 2023 ?

New responsibilities for Arcep: regulating cloud and data intermediation services

[In the report’s editorial](#), Arcep Chair, Laure de La Raudière, welcomes the two new responsibilities entrusted to Arcep by the Act on Safeguarding and regulating cyberspace:

- Regulation of the cloud computing market, in preparation for the EU’s Data Act. Arcep is planning to hold a public consultation this summer to further its dialogue with the sector’s stakeholders;
- Regulation of data intermediation service providers, in application of the EU’s Data Governance Act. On 22 May, Arcep opened a window to enable data intermediaries to notify their business and apply for certification as a trusted EU recognised data intermediary.

Digital technologies’ environmental footprint: a full-fledged regulatory chapter for Arcep

Arcep’s actions are carried out in concert with fellow public authorities, notably Arcom through the two authorities’ joint division, and ADEME. Commissioned by the Government, in 2022 Arcep and ADEME published [the first two parts of the study](#) on the assessment methodology and analysis of digital technologies’ environmental footprint in France in 2020. [The third and final part of the study](#), providing a forward-looking assessment of the digital environmental footprint in France up to 2030 and 2050, was delivered to the Government on 6 March 2023, concluding that, if no action is taken, digital technologies’ carbon footprint could triple, and its energy consumption double compared to 2020.

Since 2021, Arcep’s power to collect environmental data has been expanded to include the main digital sector players. In 2023, the Authority thus collected environmental data not only from operators, but also from device manufacturers and data centres. [On 21 March 2024, the Authority published the third edition of its annual “Achieving digital sustainability” survey](#), including new indicators such as routers/STBs’ energy consumption and data centres’ impact on the environment.

This year, Arcep was also behind the [“Satellites and the Environment: when the promises of megaconstellations collide with the limits of space” event](#), co-hosted with CNES and ADEME in November 2023 at the Cité des Sciences et de l’Industrie. Researchers, environmental associations, manufacturers, journalists and public authority representatives... close to 200 people gathered to ponder the opportunities and risks surrounding satellite megaconstellations in low earth orbit. All expressed their alarm over the proliferation of satellites and their growing impact on the environment, and over the lack of regulation. [On its website](#), Arcep summarised the highlights of the day, the

speeches, podcasts and videos, key takeaways in the form of infographics, and a three-way interview with the Chairs of ADEME, Arcep and CNES.

Arcep serving as a catalyst at the European and international levels

Arcep is an active member of the European Regulators Group for Postal Services (ERPG) and the Body of European Regulators for Electronic Communications (BEREC). In 2023, Arcep Chair, Laure de La Raudière, was elected Vice-chair for 2024 at the third BEREC plenary meeting.

Fratel, the network of French-speaking telecommunications regulators, for which Arcep has been the permanent Executive secretary since the network's creation, celebrated its 20th anniversary in 2023. At its annual meeting, Laure de La Raudière was elected to the new Network coordination committee for 2024.

Two noteworthy events in 2023:

- The creation by the Data Governance Act (DGA) of the European Data Innovation Board (EDIB), of which Arcep is a member;
- The creation by the Digital Markets Act (DMA) of a High-Level Group composed of representatives from five European bodies and networks, including BEREC.

Operator spending stood at €13.8 billion in 2023: still high despite a 5% decrease

Telecom operators and mobile telephone infrastructure operators (towercos) invested a total 13.8 billion euros in 2023. Although this marks the second consecutive annual decrease (5.2 % in 2023), spending remains strong and still exceeds pre-2021 levels. Operators' nominal retail market revenue increased by 2.5%, following through on two straight years of growth. During its ["Telconomics" press conference](#) on 30 May of this year, 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 2023.

Arcep regulating on users' behalf

In 2023, Arcep received more than 53,000 user reports, the vast majority of which concerned the telecoms sector. The most common issues reported concerned the fixed internet – the majority of which pertained to users' dissatisfaction with their fibre access. On 24 April 2024, [Arcep presented the annual scorecard](#) for its customer satisfaction observatory and its ["J'alerte l'Arcep" reporting platform](#).

Arcep overseeing the Orange copper network switchoff, as part of the new round of market analysis for 2024 – 2028

Market analysis decisions determine the obligations imposed on the operator that enjoys significant power (SMP) in the relevant market being considered which, in this case, is Orange. These obligations are designed to remedy identified competition imbalances. This new round of market analysis seeks to help shepherd the transition for copper to fibre. Arcep has identified four key objectives for 2024 – 2028:

- oversee the legacy copper network switchoff;
- ensure a satisfactory quality of service level on the copper network in the meantime;
- facilitate the completion of fibre rollouts by guaranteeing effective access to civil engineering infrastructures (poles, ducts, etc.)
- and bolster competition in the business market.

Arcep continues the work of regulating press distribution in Metropolitan France and the overseas territories

To ensure that being a newsagent remains an attractive profession, Arcep concluded that work needed to be done on newsagents' remuneration conditions. To this end, it launched a public consultation so that the sector's stakeholders could share their views on current rules of remuneration, and the changes they wanted to see happen.

Arcep thus adopted Decisions that adjust the current system of remuneration in the short term, in Metropolitan France¹ and the overseas territories², to address what the Authority decided was an urgent matter: the decreased rate of newsagents' remuneration due to the overall decline in the single-issue sales market.

In addition, in October 2023, the sector's players finalised the assortment rules for points of sale to emerge from the interprofessional agreement on which Arcep had issued an Opinion in December 2021³. This agreement was designed to give newsagents greater control over the choice of publication they sell, and thereby minimise unsold copy numbers.

Lastly, Arcep issued four Opinions in 2023 on press distribution companies' technical, pricing and contractual terms and conditions.

Postal sector: Arcep issues an Opinion on price changes for parcel and mail distribution services for 2024

On 27 July 2023, Arcep issued an Opinion on planned changes to parcel and mail services for 2024. The planned increases (8.3% on average) comply with price caps and fall within the framework that Arcep set for 2024 – 2025 in its Decision of 15 June 2023.

Arcep, first government agency in France to obtain “Great Place To Work” certification after its first nomination

Arcep was recognised last year as a “Great Place To Work”. Specialised in assessing the quality of the employee experience in the workplace, Great Place to Work awards certification to companies and government agencies who “create an outstanding employee experience”. Having scored 81% on the Trust Index, (positive answers about the organisation and its working conditions), Arcep well exceeds the threshold needed for certification as a “Great Place To Work”.

¹ [Decision No. 2023-1558](#) of 18 July 2023

² [Decision No. 2023-2307](#) of 24 October 2023

³ [Opinion No. 2021-2554](#) of 7 December 2021

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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, every year Arcep publishes its annual report in three volumes:

Volume 1 “[Arcep and regulated markets](#)”, being published today, provides an update on Arcep's responsibilities, actions and decisions. 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 connected territories](#)”, which was published on **11 June 2024**, is devoted to Arcep's actions in support of connectivity in the territories. This document is geared to elected officials, local authority representatives, regional State representatives, consumer associations and operators.

Volume 3 “[The State of the Internet in France](#)”, whose 2024 edition will be published (in French and English) on 4 July, is devoted in particular to the actions taken to monitor compliance with Net neutrality and the use of IPv6 addressing technologies, in accordance with the European Open Internet Regulation and the Independent Authorities Act. It also includes chapters on internet quality of service, ISPs' data interconnection, achieving digital sustainability and regulating gatekeeper platforms.

Related documents

- [Volume 1 in full: Arcep and regulated markets \(June 2024\) \(pdf - 25MB\)](#)
- [Editorial by Laure de La Raudière, Chairman of Arcep \(pdf - 264KB\)](#)
- [Key figures: Arcep in 2023 \(pdf - 472Ko\)](#)
- [Arcep highlights in 2023 \(pdf - 210KB\)](#)
- [Arcep in the field \(pdf - 2.17MB\)](#)





Arcep at a glance

The Regulatory Authority for Electronic Communications, Postal Affairs and Press 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 communications and postal networks in France.

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