

Welcome to the Telconomics press conference

The documents being presented are also available on the Arcep website
(News > Press releases)

The press conference will begin at 9:30 am.

Please remember to identify yourself and to switch off your microphone
and camera during the presentation

If you would like to ask a question after the presentation, we will invite you to
switch your camera on, so that we can call on you to speak.





Telconomics

Investors' presentation 2025

23 May 2025

Electronic communications market: key facts and figures

For 2024

Key telecoms market figures for 2024



Operators' revenue
(retail market)

€ **38.1** billion

+ 1.5% ↗



**Number of broadband and
ultrafast BB access lines**

32.6 million (of which 75% are fibre)

+ 0.7% ↗



Investments, including Towercos
(excl. spending on spectrum)

€ **12.2** billion

- 4.6% ↘



Number of SIM cards

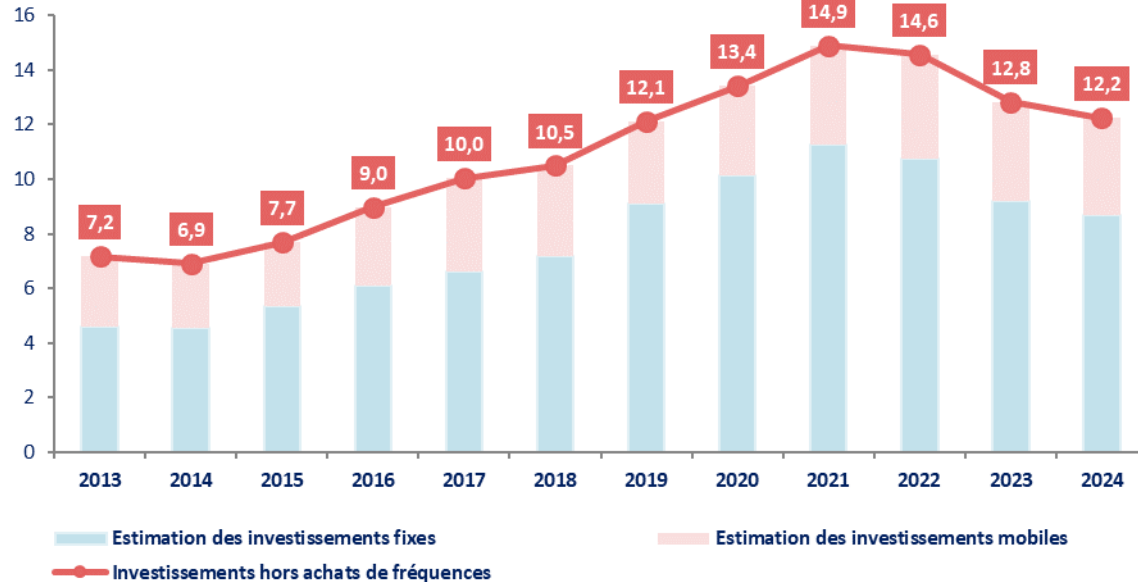
83.9 million (of which 24.3 million 5G)

+ 0.5% ↗

Investment levels remain high, but down for the third year in a row

Investissements des opérateurs de communications électroniques et d'infrastructures de téléphonie mobile hors achats de fréquences

Milliards d'€



In 2024:

- ❑ Investments totalled **12.2 billion euros** (incl. Towercos), down 4.6% compared to 2023.
- ❑ They remain higher than pre-2020 levels, the peak year for FttH local loop deployments.
- ❑ Spending on superfast fixed and mobile local loops (6.4 billion euros) is decreasing due to shrinking investment in fibre and 4G and 5G local loops.

Deployments continue

On fixed networks

Network rollouts continued at a steady pace in 2024: **around 2.6 million premises were passed for fibre.**

4 million still remain to be passed, which include the most complex installations.

91% of premises in the whole of France are able to subscribe to fibre.

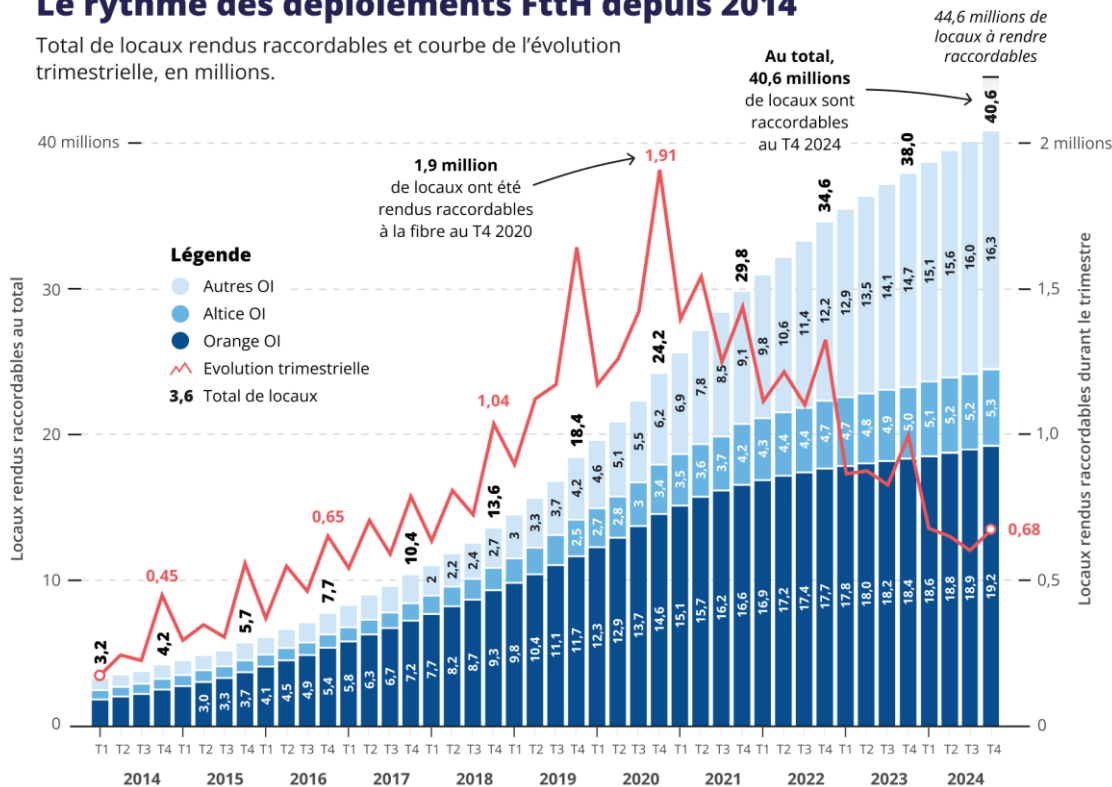
On mobile networks

Rollout efforts continue, especially for 5G

A total of between 11,805 and 20,594 5G-capable cell sites at then end of 2024, depending on the operator.

Le rythme des déploiements FttH depuis 2014

Total de locaux rendus raccordables et courbe de l'évolution trimestrielle, en millions.



Note méthodologique : en raison de double-déploiements, l'addition des locaux rendus raccordables par opérateur peut excéder légèrement le total de locaux raccordables tous opérateurs confondus.

Arcep supports efficient investment: network sharing

Fixed network sharing: more than 90% of premises passed can subscribe to at least 4 operators

FttH network sharing has been legally required since 2009, as part of a bid to optimise spending and coordinate rollouts. To this end, **Arcep's strategy has been to promote risk sharing and enable the largest number of operators to participate in FttH network investments, through passive solutions for accessing the network through co-financing schemes.**

Today, co-financing schemes are widely used by national operators to access FttH networks. At the end of 2024, 92% of premises passed were being served by at least four operators, via passive sharing solutions.

A report from Morgan Stanley (published in May 2024) highlighted **the efficiency of France's regulatory framework**, by comparing overbuild rates in several European countries.

Mobile network sharing: a reality at more than 49% of cell sites in Metropolitan France

Arcep encourages operators to use passive infrastructure sharing, which helps streamline the number of towers, not least for the sake of better regional digital development and environmental protection.

Arcep is also in favour of greater active sharing in rural areas, particularly if it helps improve coverage and quality of service, in addition to reducing the environmental footprint.

Customers' average monthly mobile bills are levelling but fixed plan costs are rising; the price of catalogue plans is dropping

Consumer price index for fixed and mobile services
in Metropolitan France



Average monthly price of a broadband and ultrafast BB plan reaches €36.90 excl. VAT, or + €2.20 YoY

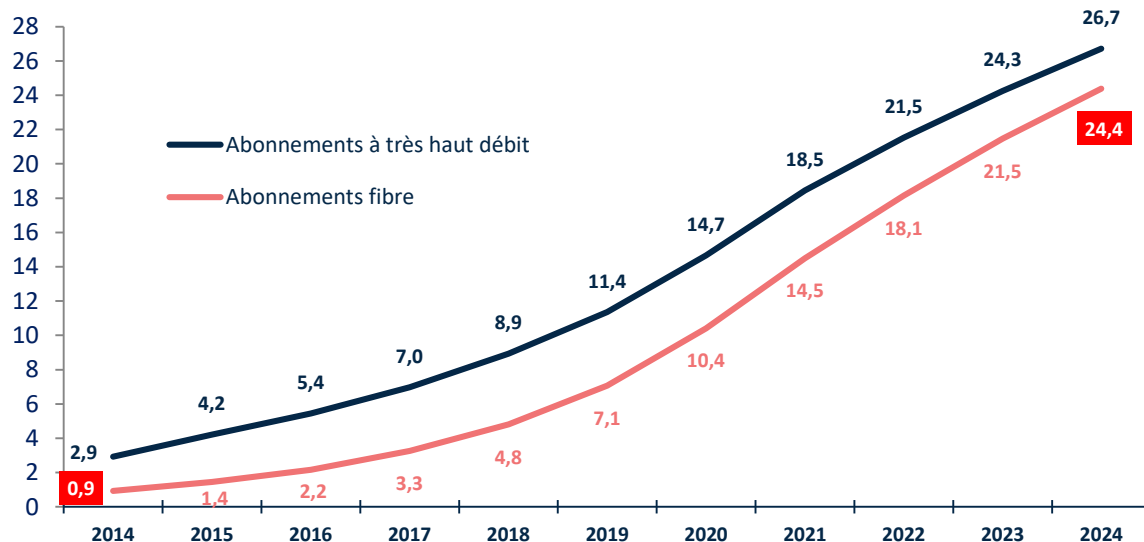
- Subscription price increases in 2022 and 2023 still affecting customers' average monthly bill.
- At the same time, catalogue prices for fixed services – i.e. for new customers – are down 5.9% due to:
 - The rollout of new, cheaper plans that include fewer services
 - Price decreases for certain fibre plans, which are tending to align with DSL price points

Average monthly phone bill levelling off at €14.90 excl. VAT

- The catalogue price of mobile services has decreased by 16.7% with the rollout of new plans since 2023, including smaller data allowances and more in line with the needs of certain users, all for a lower price.

Fibre subscriptions: from 1 million to 24.4 million in 10 years

Number of end-to-end optical fibre subscriptions (million)

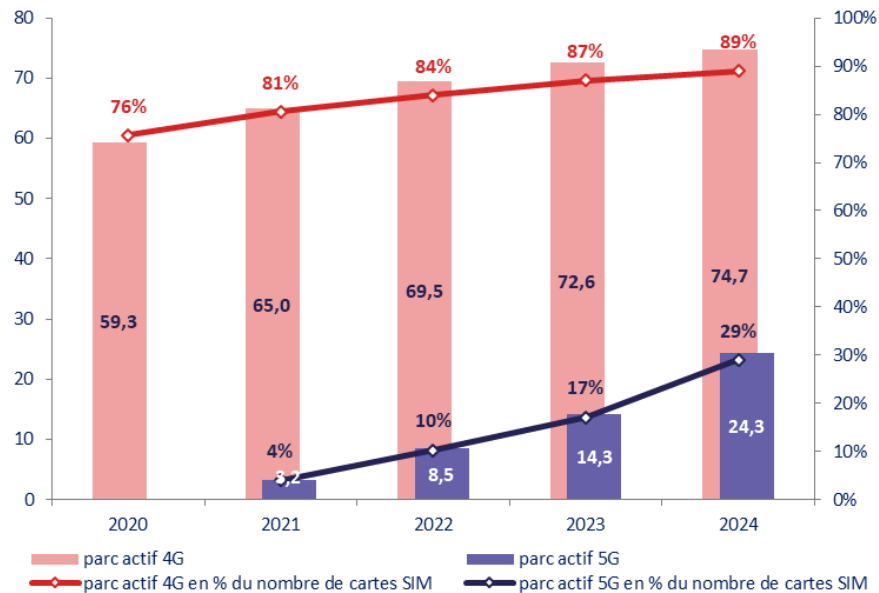


75% of internet subscriptions are to a fibre plan

- 24.4 million FttH subscriptions in 2024, or +2.9 million in 2024
- Ultrafast broadband subscriptions stand at 26.7 million, representing 82% of total internet subscriptions in France

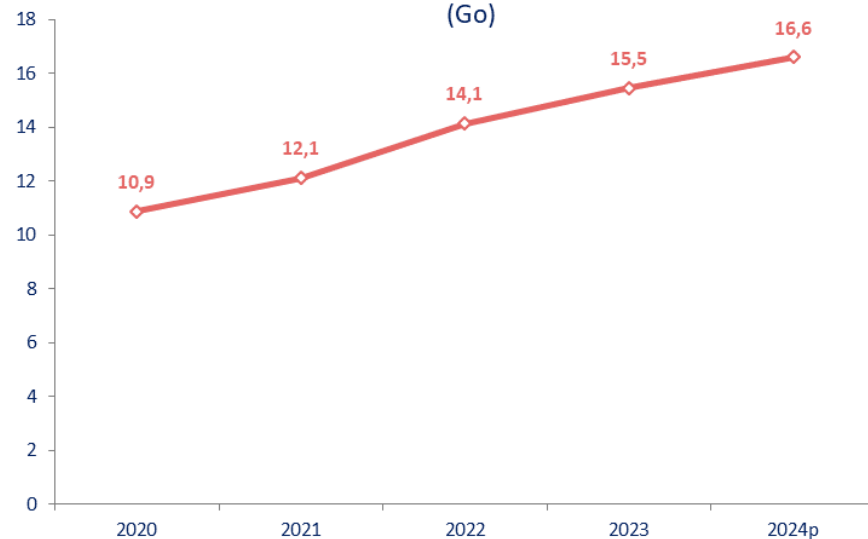
29% of mobile service consumers use 5G

Nombre de cartes actives sur les réseaux 4G et 5G
(en millions)



+ 10 million active 5G users YoY

Consommation mensuelle moyenne de données mobiles
des utilisateurs actifs des réseaux 4G
(Go)



Average monthly traffic for active 5G network users
estimated at 25 Gb

Core workstreams for the sector

Current and upcoming

100%

TELECOMS



Pour consulter chaque
objectif in détail

TELECOMS

1. Finalise the transition to **ultrafast** access for everyone
2. Guarantee **businesses'** connectivity and create a more competitive market
3. Ensure the **quality** and **sustainability** of electronic communications infrastructures and provide expertise to safeguard their **resilience**

ENVIRONMENT

4. Improve and share knowledge of digital technology's **environmental footprint**
5. **Take action to reduce** this footprint

DIGITAL INFRASTRUCTURES

6. Foster economic development through **data and innovation**
7. Foster more freedom of choice in **cloud** services
8. Work towards more open **digital markets** and **AI systems**

PRESS DISTRIBUTION

9. Promote an updated **press distribution** system; showcase the **value of newsagents**

Fixed access

- 2024-2028 market analysis decisions
- Monitoring and supervising the copper network switch-off
- Fibre as the infrastructure of reference: ensuring FttH network QoS
- Monitoring financial conditions for accessing FttH networks
- Wholesale activated fibre offers: competition continues to develop

2024 – 2028 market analysis decisions: relaxing pricing obligations and overseeing the copper network switchoff

Relaxed pricing obligations and a structured copper network switchoff

- ❑ Overseeing **the copper network switchoff** and ensuring that **quality of service** remains decent during the process.
- ❑ **Factoring in competition dynamics** with **relaxed supervision of copper network pricing** in locations where fibre has been deployed and where the main operators are present:
 - Maintaining cost-based pricing in the least competitive areas (Zone A);
 - Creating areas subject to an obligation of non-excessive pricing (Zone B);
 - Creating areas where pricing supervision is lifted as the switchoff nears (Zone C).
- ❑ Facilitate **the completion of fibre rollouts** ensuring proper access to civil engineering infrastructures

Monitor the evolution of competition and ensure predictable pricing on copper access up to 2028

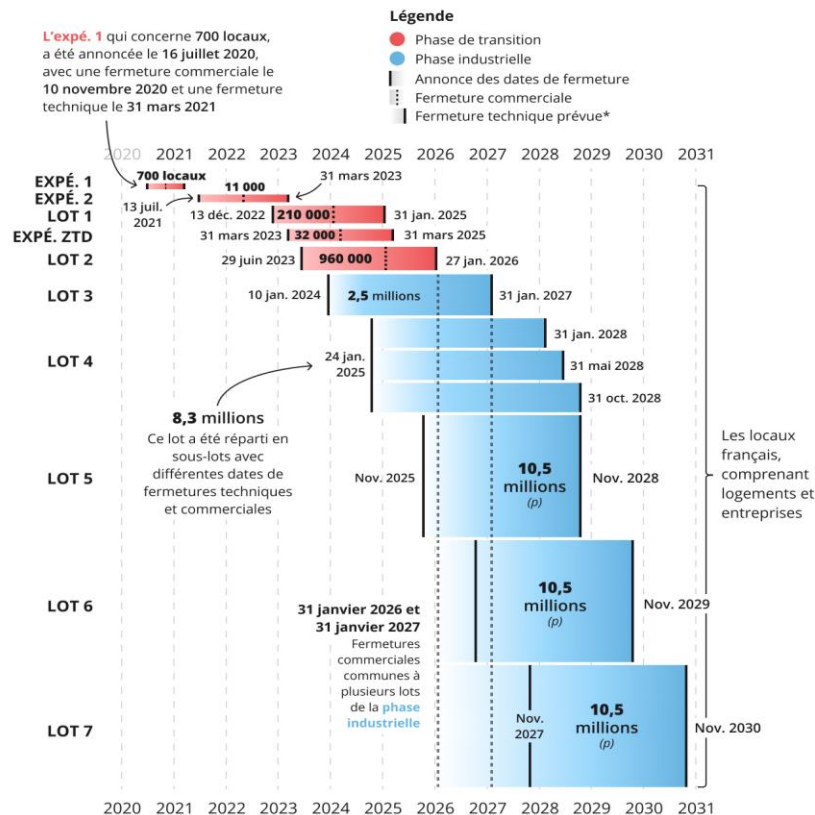
- ❑ Provide the sector with **clarity** on pricing:
 - Cost-based pricing areas (Zone A): Stability of the price initially set for 2024 and 2025 up to 2028; no comments from the European Commission on the draft decision; Decision adopted in April 2025
 - areas subject to an obligation of non-excessive pricing (Zone B): Commitment from Orange to maintain 2025 prices up to 2028; no comments from the European Commission on the draft decision making the commitment legally binding; Decision adopted in May 2025
- ❑ Bolster competition in **the business market**

Monitoring and supervising the copper switchoff

Gradual entry into a more industrial phase

- ❑ **Technical switchoff of first batch** recorded in January 2025
- ❑ **Postponed switchoffs announced in a few locations** on a small number of lines:
 - **Batch 2:** 8% of municipalities' commercial closures postponed
 - **Nationwide commercial closure:** 10% of municipalities' commercial closures postponed
- ❑ Postponements reflect the desire to **guarantee the completion of fibre network rollouts, in accordance with the regulatory framework**
- ❑ Smaller numbers of postponements, testifying to the **overall success of the first stages of the switchoff**

LE CALENDRIER DE FERMETURE TECHNIQUE DU RÉSEAU CUIVRE



* Fermeture du réseau cuivre présentée par lots et conditionnée au respect des critères fixés par l'Arcep. En cas de non-respect des critères, la fermeture d'un lot annoncée pourrait être reportée.

(p) : nombre prévisionnel de locaux annoncé par Orange dans son plan de fermeture du cuivre en 2022.

Fibre as the infrastructure of reference: Ensuring FttH network quality of service

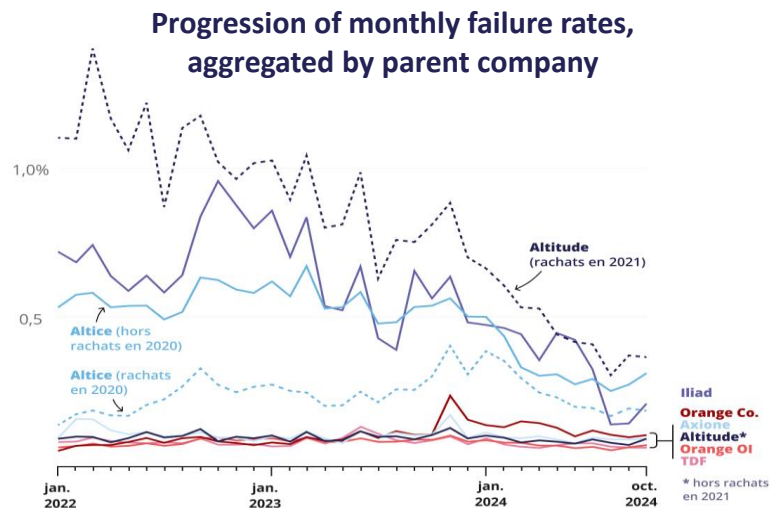
Arcep taking action on two fronts:

- ❑ Ensuring upgrades on networks with the highest failure rates, monitoring XpFibre (Altice Group), Altitude Infra and Réseau Optique de France (Iliad Group) rehabilitation plans
- ❑ Ensuring improved quality of technicians' daily service calls

Arcep's tools

To monitor the situation as it progresses, Arcep created a scorecard for fibre network quality whose 5th edition was published in March 2025, highlighting a noticeable improvement in network quality

- ❑ **Failure rates continue to drop:** average failure rates on the most problematic networks decreased from 0.51% in January 2024 to 0.30% in October 2024. They remain high on certain networks, notably in the Ile-de-France region.
- ❑ **New indicators added to the scorecard, providing an initial snapshot of the quality of connections** installed by commercial operators.



Arcep also monitors compliance with the commitments that the sector's stakeholders made to the Minister and the Arcep Chair in September 2022 and supplemented in September 2023. ([Further information on the dedicated webpage](#))

Monitoring the financial conditions for accessing FttH networks: providing the sector with clarity

- ❑ Goal: Complete the objective analysis of public initiative networks' (PIN) additional operating costs in 2025
- ❑ A public consultation to establish a common framework for the costs incurred during optical fibre networks' operating stage will be held this summer. Its purpose will be to:
 1. Define and produce an objective analysis of relevant cost categories;
 2. Model additional operating costs incurred in rural areas.
- A portion of the Authority's action plan is detailed in its Ambitions 2030 strategy ([lien](#), part 2.2 page 16);
- ❑ Arcep also published a list of notified FttH line access offers on its website ([lien](#)).

Wholesale activated fibre solutions: increasingly competitive market benefitting business market operators

❑ Operators that cater to businesses, which are vital to stimulating market competition, do not have the same economies of scale as large national operators, and require so-called “activated” solutions.

❑ Arcep is working to develop a wholesale “activated” market to foster competition in the retail market.

- **In the market for wholesale activated generalist FttH solutions** (standard offer with no specific QoS guarantee, available to both consumers and businesses): competition continues to grow



End of 2024, **close to 90% of premises were eligible to subscribe to at least two wholesale activated FttH offers**, compared to 19% in 2020.



In light of the analysis of competition dynamics in this market, Arcep adopted a **decision to lift regulation of the activated generalist wholesale solutions market**. This decision includes a transitional period during which existing remedies will be kept until 31 March 2026.

- **In the wholesale market for high quality activated access** (aimed chiefly at businesses, carrying guaranteed four-hour service restoration and guaranteed speeds): prices have decreased and could continue to drop in 2025.



These price decreases could help accelerate the switch from copper to fibre.

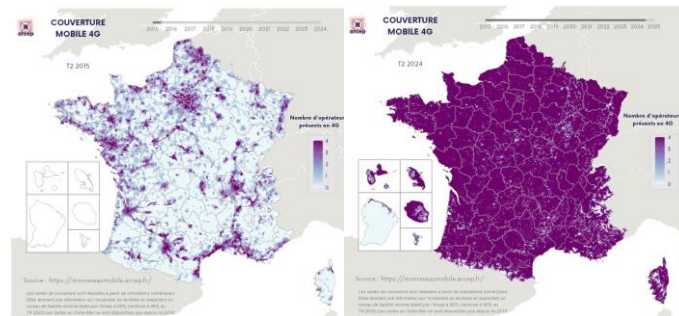
Mobile access

- New advances in mobile connectivity
- Frequencies for businesses

New advances in mobile connectivity in 2024

Continued implementation of the *New Deal for Mobile*

- Targeted coverage scheme: **3,481 sites** in service at the end of 2024 (of the 5,122 identified)
- "Good coverage" for voice/texting (2G/3G): between **99.7% and 99.9%** of the population covered
- 4G: **More than 99.9%** mobile cell sites now enabled



5G rollouts continue

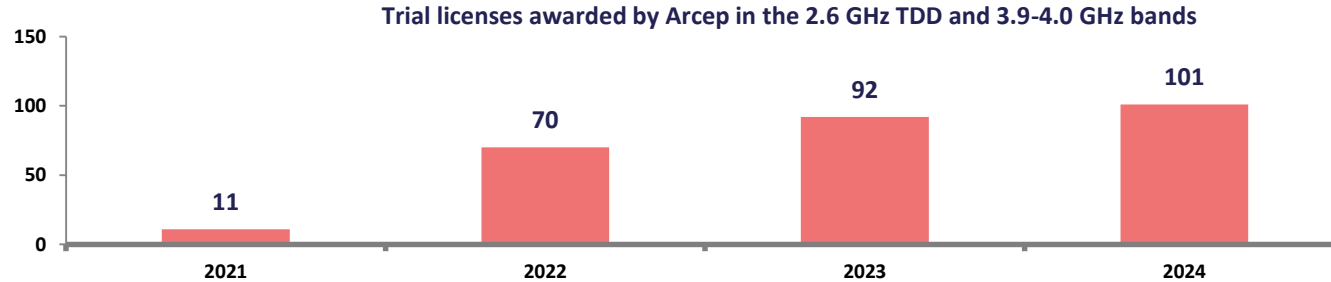
	Bouygues Telecom	Free Mobile	Orange	SFR
Number of 5G cellsites end of 2024	13,998	20,594	11,805	13,966
<i>progression since end of 2023</i>	+ 2,727	+ 1,987	+ 3,011	+2,998
<i>of which sites using the 3.5 GHz band</i>	8,700	8,061	11,388	9,401

Growing ubiquity of 4G+

At the same time, more and more cell sites have increased their speeds: over **88% of sites** at the end of 2024, depending on the operator.

Frequencies for businesses: giving them the means to be competitive and to innovate

❑ Growing number of 4G/5G industrial use case trials



- ❑ In the 2.6 GHz TDD band, long-term frequencies have been awarded to establish professional mobile networks since 2019. 16 “vertical” players have a licence to use frequencies, representing coverage of 57 zones in Metropolitan France.
- ❑ Arcep is currently in the process of drafting the procedures and technical terms and conditions for creating a framework for long-term frequency assignments in the 3.9-4.2 GHz band.
- ❑ Verticals can also make use of solutions from national mobile operators that are tailored to their needs: licences to use the 3.4-3.9 GHz band awarded in 2020 include an unprecedented set of obligations that came into effect at the end of 2023.

Spotlight on the overseas departments and territories

The situation in the French overseas territories

MOBILE

Mobile deployments in 2024:

- 5G deployments continue in Réunion and French Guiana in particular: 520 sites opened commercially in Réunion and 70 in French Guiana

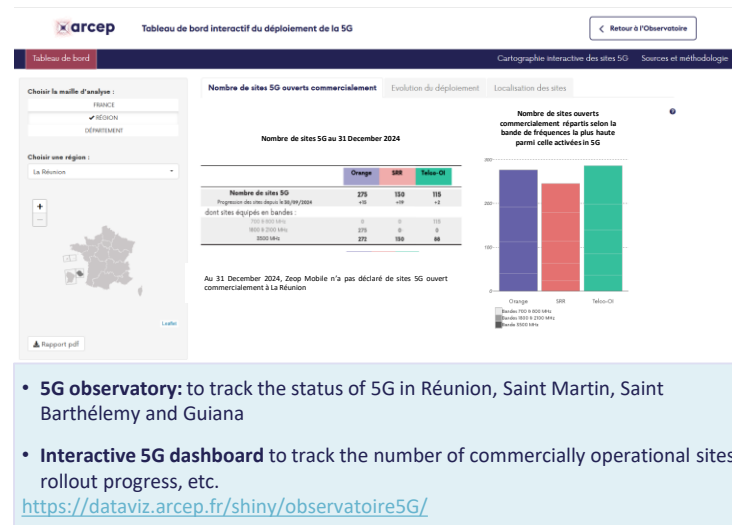
A pivotal year for frequency assignments:

- End of the assignment procedures for 5G bands in the overseas departments and territories, with the assignment of the 3.5 GHz band Mayotte, Guadeloupe and Martinique
- Reassignment of the 900 MHz, 1800 MHz and 2.1 GHz bands up to 2036, next licence expiration date in the overseas territories
- Assignment in early February of temporary frequencies in Mayotte in response to the crisis, and in April in the 3.5 GHz band to prevent the risk of overload on mobile networks

FIXED

FttH rollouts continue to progress:

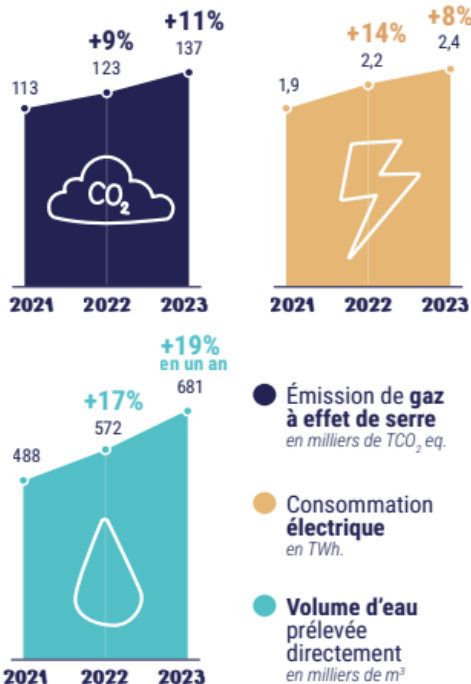
- 90,000 lines deployed in 2024 (versus 110,000 in 2023)
- Réunion ranks 5th in France for highest regional coverage
- Average FttH coverage of 80% (+7 pts YoY)



Spotlight on digital technology's environmental footprint

Improving and sharing knowledge of digital technology's impact on the environment

L'empreinte environnementale des opérateurs de centres de données progresse pour les 3 impacts mesurés



A neutral expert working to inform public debate, every year Arcep deepens and shares its knowledge of ICT's environmental footprint

- ❑ Publication of the 4th edition of the **annual Achieving digital sustainability survey** (2023 data) in April:
 - Our goal: steadily increase the stakeholders covered (optical fibre cable manufacturers this year; cloud service providers in 2026)
- ❑ Publication of **a study on the environmental impact of audiovisual media consumption**, with Arcom and in concert with ADEME in October 2024
- ❑ Work underway to deepen and share knowledge of **AI's impact on the environment**
- ❑ Arcep is a **driving force in Europe and internationally**, committed to expanding global understanding of digital technology's impact on the environment
 - Co-Chair of the **BEREC Sustainability** working group since 2020
 - Chair of the **ITU Sub-group on National Greenhouse Gas Emissions Monitoring Indicators**

Working to reduce digital technology's impact on the environment

New measures for reducing digital technology's environmental footprint

- ❑ Multiple levers for action identified through our work: extending the life of devices, ecodesign of digital devices and services...
- ❑ Courses of action to be taken on the right scale: Arcep will continue to lend its expertise to discussions on environmental issues, particularly at the European and international level.

One vital step: for every stakeholder to be accountable for their footprint, including digital service providers

- ❑ Promoting the General policy framework for the ecodesign of digital services (RGESN) and the launch of the Digital Ecodesign Stakeholder Forum, in collaboration with participating authorities.
- ❑ Involvement in the creation of a new European framework aimed at making digital service providers aware of and accountable for their environmental footprint.
- ❑ Mobilising stakeholders to work together on minimising AI's impact on the environment.

Arcep, regulator of digital
infrastructures

A digital strategy to create more open digital markets and AI systems

Implementing European regulations for more open digital ecosystems

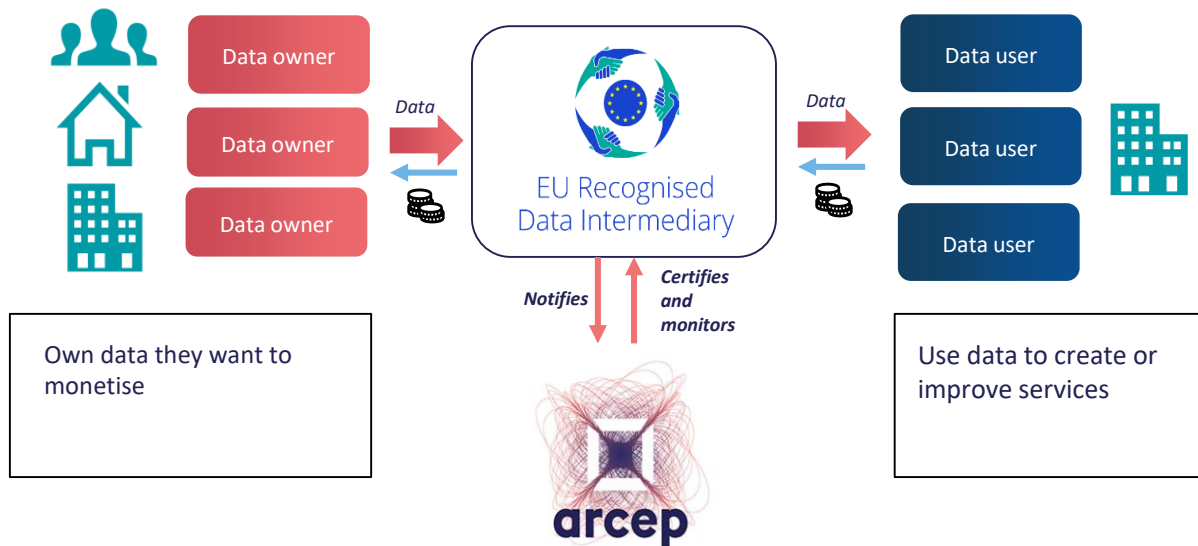
- **Arcep involved at the European level, within BEREC and through the European Data Innovation Board**
 - Participation in the High-Level Group for the implementation of the DMA
 - Data Act implementation coordination within BEREC, in close cooperation with the Commission
 - Analysis of digital market developments (co-chair of the BEREC *Digital Markets* working group)
 - Participation in the European Data Innovation Board (EDIB), to ensure consistent implementation of the Data Governance Act and the Data Act
- **Working to ensure that AI develops for the greater good**
 - Guaranteeing that key AI resources (data, computing power, the Cloud...) remain accessible under fair and non-discriminatory conditions
 - Analysing the impact of generative AI as a new gateway to the internet (cf. upcoming Report on the State of the Internet in France)

Responsibilities expanded to include the data economy and cloud computing

- Regulation of data intermediation service providers
- Regulation of cloud computing

Unleashing data's potential: regulating data intermediation service providers

To facilitate **data sharing** between and within different sectors, while increasing trust in these exchanges, the Data Governance Act creates a **new category of player: data intermediation service providers**. They are subject to a set of rules, whose compliance is monitored by Arcep, and which gives them the ability to obtain the label of “**EU recognised data intermediary**”.



State of play

- ❑ **15 companies notified in Europe, incl. 8 in France**, in a range of fields such as agriculture, airport logistics and health.
- ❑ **One company in France**, and three in Europe, working – e.g. for the banking or insurance sector – to enable the transmission of personal and business data collected from reliable sources, have obtained the **label of trusted EU recognised data intermediary**.

Creating more open ecosystems: regulating cloud computing services

Barriers **to a smooth-running cloud computing market** have been identified, as testified by the Competition Authority's opinion of 29 June 2023 and the BEREC report of 3 October 2024 on this topic. Arcep is responsible for making the market more fluid, in the run-up to the Data Act.

To give businesses the ability **to switch providers more easily and** develop the habit of using **several cloud services at once**, Arcep has been tasked with lifting multiple barriers, including:



Technical barriers:

- Enabling the interoperability of services and portability of data and applications
- Thanks to rules and standards stipulated by Arcep



Commercial barriers:

- Preventing consumers from getting locked in due to prohibitive switching costs
- Capping data transfer and migration fees, monitored by Arcep

Arcep continues to work in both of these areas, taking into account stakeholders' contributions to the **public consultation** held from 14 October to 16 December 2024.

Forward-looking analysis in support of Arcep's objectives

Forward-looking “Future networks” approach

Preparing Arcep for future regulatory challenges

New cycle of inquiry, following through on the inaugural work carried out in 2018. Analyses will be conducted by Arcep, backed by a **Scientific Committee**, working together to **understand how networks are likely to evolve** over the next 5 to 10 years.

Briefing notes on the first topics identified: “**Telecoms with an IT core**” and “**Network security and resilience**” have already been published.

Investigations have begun into: “Choosing the right digital tools: how electronic communications networks align with **digital practices**,” “**Are data** central to future networks’ value?” and “**AI** and electronic communications networks”.

L'Arcep et les réseaux
du futur



*For more
information
about the process*

Q&A

Do you want to ask a question?

Please turn on your camera to identify yourself and allow us to give you the floor.

Thank you for attending the conference!

You can find the press release, Observatory
and presentation on our website.



Annex

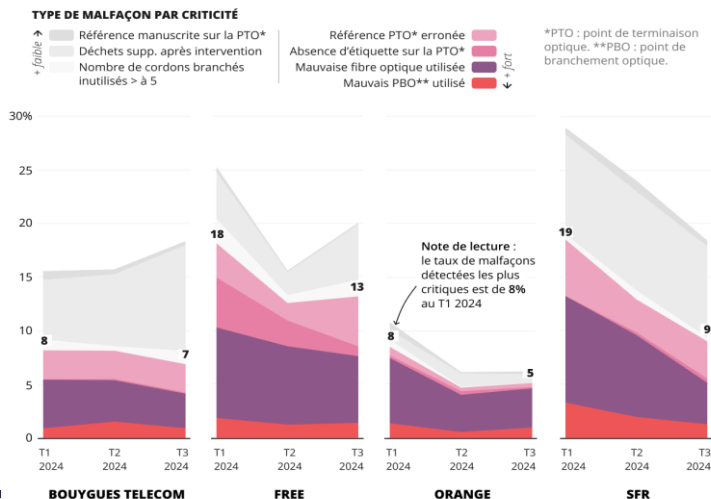
Fibre as the infrastructure of reference: Ensuring FttH network QoS

FttH network QoS scorecard:

To monitor the situation as it progresses, Arcep created a scorecard for fibre network quality whose 5th edition was published in March 2025, highlighting a noticeable improvement in network quality.

The scorecard was expanded to include indicators providing an initial snapshot of the quality of the connections installed by commercial operators.

Rate of non-compliant connections



Rate of defect correction

