

Press release

FRENCH TELECOMS MARKET

Annual “Telconomics” conference: Operators’ investments remain high, and their revenue continues to rise

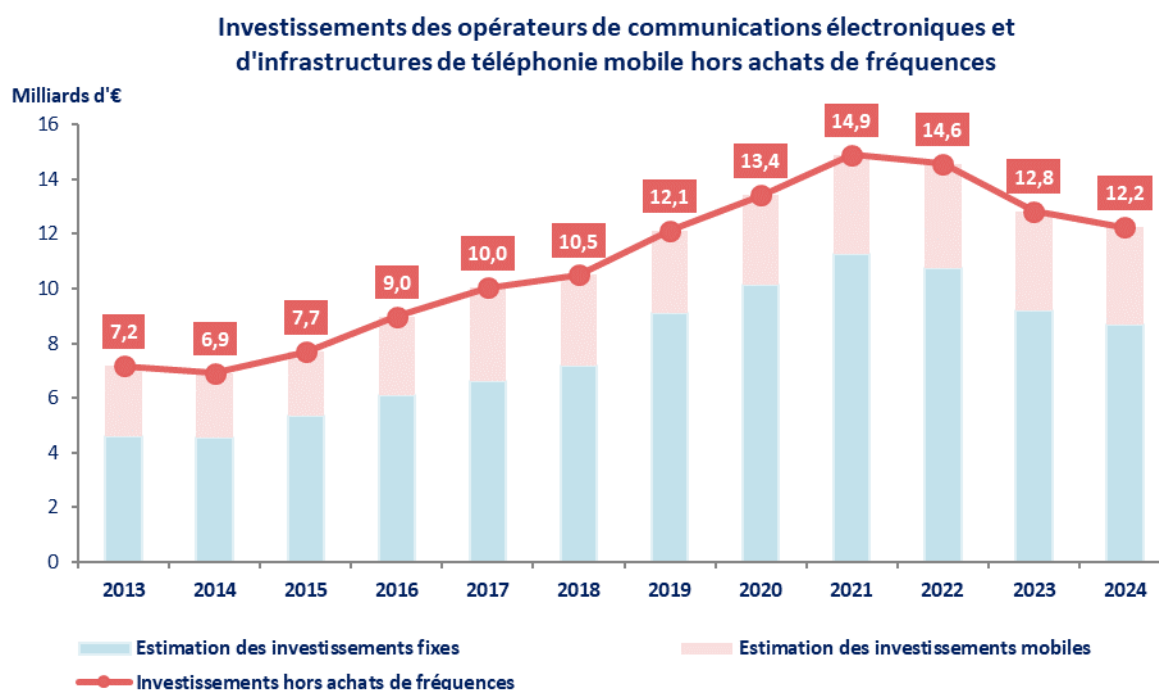
Paris, 23 May 2025

This morning, Arcep is delivering its annual “Telconomics” progress report on France’s electronic communications market to coincide with the publication of the 2024 annual observatory. It compiles key economic data on the French electronic communications market, along with the fixed and mobile price index for 2024.

Operators’ spending (12.2 billion euros in 2024) decreased for the third year in a row, but remained higher than pre-2020 investment levels

Electronic communications operators’ and mobile telephony infrastructure operators’ (towercos) investments in 2024 totalled 12.2 billion euros. These investments decreased by 4.6% YoY, while nevertheless remaining high.

Among these investments, spending on ultrafast fixed and wireless local loop deployments stood at 6.4 billion euros, or 52% of total spending, which is consistent with the previous year. The decrease in spending on ultrafast access (- 6.0% YoY) is due chiefly to decreased spending on ultrafast fixed local loop deployments, which is tied to the smaller number of additional premises passed for FttH: + 2.6 million in 2024 compared to + 3.5 million in 2023. It is also due to a decline in spending on ultrafast wireless local loops (- 3.75% YoY).



Fibre network sharing continues, and mobile network sharing holding steady

Thanks to multiple co-investment schemes that both promote efficient investment and provide operators with network access under guaranteed equitable terms, a growing number of premises passed for fibre have a choice between at least four operators: 92% in 2024 compared to 83% in 2023. Mobile network sharing levels remain stable: close to 50% of mobile network access infrastructures are shared in Metropolitan France as a whole, and more than 60% in rural areas.

Operators' retail market revenue rose for the fourth consecutive year, and by 1.5% in 2024

Operators' fixed services market revenue grew at a slightly higher rate in 2024 than in 2023: + 3.3% YoY in 2024, compared to around + 2% in 2023 and in line with the three previous years. This growth is due in particular to increases in the price of broadband and ultrafast broadband plans in 2022 and 2023, which continued to carry over to revenue in 2024, driving up the average annual monthly bill for these subscriptions. This average bill stands at €36.90 excl. VAT, which is up by €2.20 excl. VAT YoY.

Catalogue prices for fixed service subscriptions – which apply only to new customers – decreased by 5.9% in 2024, however, after having increased steadily since 2019. This decrease can be attributed largely to two factors: the rollout of new, cheaper plans that no longer include services that were part of triple play bundles, and a decrease in the price of certain FttH plans. The average price of fibre plans is tending to align with that of DSL plans, while not being completely identical.

Revenue in the mobile market increased only slightly (+ 0.4% YoY in 2024) after three straight years of growth, while the average monthly revenue per SIM card is levelling off at €14.90 excl. VAT.

This weaker momentum in the mobile market can be explained in part by a decrease in the price of mobile catalogue services since 2023. New plans with smaller data allowances, which better align with certain users' needs, are being offered at lower prices.

Three quarters of the 32.6 million internet subscriptions are FttH, and around three out of 10 SIM cards have been activated on 5G networks

The number of FttH subscriptions in France reached 24.4 million at the end of 2024, compared to fewer than one million ten years ago. With close to 3 million additional subscriptions YoY in 2024, the number of FttH internet subscriptions increased substantially once again and accounted for 75% of total internet subscriptions at the end of 2024 (+ 9 points YoY). Fibre plans thus continue to replace DSL broadband and ultrafast broadband plans (which totalled 6.3 million in 2024, - 2.6 million YoY).

In the mobile market, 24.3 million SIM cards were being used on 5G networks as of Q4 2024. The number of SIM cards activated on 5G networks grew by 10 million YoY. They represent 29% of the 83.9 million mobile cards in service at the end of 2024 (+ 12 points YoY). The growing number of 4G and 5G mobile network users has gone hand in hand with a surge in data traffic. Operators' active 4G customers generated an average 16.6 Gb of traffic a month in 2024, up 1.1 Gb YoY.

Recap of the Arcep's "Ambition 2030" strategy and providing stakeholders with clarity on market regulation

The "Telconomics" event provides Arcep with an opportunity to:

- Reiterate the goals of its "Ambition 2030" strategy to equip the country with digital infrastructures that are accessible everywhere, to everyone and for a long time to come.
- Discuss the main workstreams that are underway, including FttH network quality, the financial conditions governing access to these networks and the switchoff of the legacy copper network, along with developments in connectivity for businesses;
- Offer a reminder that the aim of Arcep regulation is to facilitate ongoing fixed and mobile ultrafast network rollouts thanks to efficient investments, notably through network sharing;
- Talk about the issue of digital technology's impact on the environment, and put Arcep's actions in this area into perspective;
- Outline the implementation of European regulations for open digital ecosystems, notably those that apply to cloud computing, AI systems and the data economy;
- Present the forward-looking "Future networks" approach designed to prepare Arcep for future regulatory challenges.

Associated documents

- [Annual observatory for 2024](#)
- [Changes in the price index for fixed and mobile services in 2024](#)
- [Open datasets](#)
- [Press conference presentation](#) (English version available)

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 electronic communications, postal and press distribution networks in France.