

Press release

ANNUAL REPORT

Arcep publishes the first two volumes of its Annual Report

Paris, 27 June 2025

Today, Arcep is publishing the 2025 edition of [Volume 1 of its annual report, “Arcep and regulated markets,”](#) providing a detailed update of Arcep’s responsibilities, and the actions and decisions carried out in 2024. As well as [Volume 2, “Arcep regulation in support of connected territories,”](#) providing thematic factsheets on Arcep’s regulation in support of connected territories.

The third and final volume of Arcep’s Annual Report, **“The state of the internet in France: summary and outlook for Arcep activities,”** will be published on 4 July and presented at a press conference.

What are the highlights of the work that Arcep carried out in 2024?

“Ambition 2030” Strategy

New technologies, new user expectations and new responsibilities for Arcep: with its nine strategic objectives and three courses of action, Arcep is aligning its strategies with the challenges of our times. Its ambition up to 2030 is to ensure that the country is equipped with digital infrastructures for the coming decades, and that the internet remains an area of freedoms. These infrastructures for accessing the fixed and mobile internet, the cloud and AI services, and for sharing data must be accessible **everywhere, to everyone and for a long time to come**. Closing out the work carried out in 2024, Arcep Chair, Laure de La Raudière, unveiled this new strategic ambition at the 2025 New Year’s Ceremony ([read her speech](#)).

New powers entrusted to Arcep in 2024: the regulation of cloud services and data intermediaries

The Law on Securing and Regulating Cyberspace (“Loi SREN”) of 21 May 2024 entrusts Arcep with new regulatory responsibilities over the data economy and cloud computing services.

To promote the development of the data-driven economy and innovation, Arcep’s regulation is geared to facilitating data sharing between and within the different sectors, thanks to reliable and trustworthy methods of governance. Upon the adoption of the “SREN” Act in France, Arcep began welcoming notifications from data intermediary services providers. To date, it has awarded one company (M-iTrust) with the “EU-recognised Data Intermediation Service Provider” label.

To improve cloud service users’ freedom of choice, the Arcep regulation makes it easier to switch providers and to adopt a multicloud solution, thanks to two levers: capping egress fees when switching providers or using a multicloud solution, and defining the rules and methods for implementing the essential requirements for interfaces to be interoperable, portable and open.

Digital technology’s environmental footprint: a full-fledged regulatory objective for Arcep

Arcep has been exercising new powers and responsibilities in managing digital technology’s environmental footprint since 2021, entrusted to it by the legislature, notably with respect to collecting environmental data.

In 2024, Arcep published the [fourth edition](#) of its annual “Achieving digital sustainability” survey that presents the data collected from digital industry players, to deliver an account of how their environmental impact in France is evolving. A survey commended by the World Bank and the International Telecommunication Union (ITU) in a joint report entitled, [“Measuring National ICT Sector Climate Impact – Arcep case study”](#).

In May 2024, the Arcep-Arcocom joint division, in association with ADEME, published [the General Policy Framework for the Ecodesign of Digital Services \(RGESN\), a task assigned by the REEN Act¹](#). Aimed at ICT

¹ REEN Act: “Law of 15 November 2021 on reducing digital technology’s environmental footprint in France”

experts and professionals wanting to implement an ecodesign process for a service (websites, applications, AI, software, API), this technical document gives its adopters the ability to introduce levers for reducing the impacts that digital technology has on the environment, as identified in the [Ademe-Arcep report on ICT's environmental impact in 2020, 2030 and 2050](#).

In accordance with the "Climate and Resilience" Act, the Arcep-Arcom joint division, in collaboration with ADEME, also carried out a [study of assessing the environmental impact of French people's audiovisual media use](#).

In September 2024, the annual "Connected Territories" conference devoted an afternoon to the topic of digital technology's environmental footprint.

The "Future networks" cycle of inquiry

In this era of constant innovation, in technologies, practices and business models, the common goods that networks represent are being continually subjected to changes, if not profound upheavals.

The purpose of this cycle of inquiry is to prepare Arcep for upcoming challenges in network regulation, and to steer its actions accordingly. The following topics have already been the subject of briefing notes, and webinar presentations:

- ["Telecoms with an IT core"](#) (4 October 2024)
- ["Electronic communications networks' resilience"](#) (21 May 2025)
- ["AI and electronic communications networks"](#) (26 June 2025)

Operator spending still high, and revenue continues to climb

Electronic communications operators and mobile telephone infrastructure operators (towercos) invested a total **12.2 billion euros in 2024**. Although this marks the third consecutive annual decrease (4.6% in 2024), spending remains strong and still exceeds pre-2021 levels. Operators' retail market revenue increased for the fourth year in a row: by 1.5% in 2024. During its ["Telconomics" press conference](#) on 23 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 2024.

Fibre has been deployed to 91% of premises in France – In carrying out its supervisory duties, Arcep enjoins several operators to comply with their obligation to complete FttH rollouts

At the end of 2024, 91% of premises in Metropolitan France were eligible to subscribe to a fibre (FttH) plan, with 4 million remaining to be passed. With just over 6 million additional premises passed over the past two years, the overall momentum of FttH rollouts slowed in 2024, particularly in the most densely populated parts of the country, a trend that had already begun in 2022 and 2023.

Arcep is responsible for monitoring compliance² with the fibre deployment commitments that operators have made in the less densely parts of the country covered by private sector initiative (called **AMII**³ and **AMEL**⁴ areas in French). Having ascertained that Orange had failed to comply with the first deadline for its fibre network rollouts in "AMII" areas, Arcep's "Restricted" Body imposed a 26 million euro fine on the operator in 2023. Through its Decision of 28 October 2024, France's Council of State (*Conseil d'État*) upheld this decision by the Arcep "Restricted" Body to fine Orange. Also in 2024, as part of its process of monitoring compliance with the obligation of "completeness" for FttH network rollouts, the Arcep body responsible for settling disputes, legal proceedings and investigations (aka "RDPI") enjoined Orange, Réseau Optique de France, Réunicable, SRR and XpFibre to comply with this obligation at set shared access points where a substantial portion of premises were not yet connectable. In early 2024, Arcep issued an opinion on the new proposed commitments from Orange, which the Secretary of State for Digital Affairs accepted in March 2024. In April 2025, in monitoring compliance with these new commitments, Arcep's "RDPI" Body enjoined Orange to comply with its commitment on delivery times for premises classified as "connectable upon request".

² Pursuant to Article L. 33-13 of the French Postal and Electronic Communications Code (CPCE)

³ Areas where the Government has issued a call for investment letters of intent ("*Zone d'appel à manifestation d'intention d'investissement*")

⁴ Areas covered by calls for expressions of local interest ("*Zone d'appel à manifestation d'engagement local*")

Ongoing work on fixed network quality of service, signs of visible improvement in late 2024, to be confirmed over time

Fibre-to-the-Home (FttH) networks are intended to become the new infrastructure of reference in France. Improving the quality of their operation remains a major priority for Arcep, particularly as 75% of subscriptions in the country today are to a fibre plan. Addressing the issues that users have been encountering (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 2022 and 2023, Altitude Infra, XpFibre and Réseau Optique de France (Illiad Group) notified their network rehabilitation plans to the Authority, which works vigilantly to ensure that these rehabilitation plans are successfully executed, and monitors the evolution of the quality of these networks on an ongoing basis, in concert with the affected operators.

To give local authorities, and all stakeholders, the ability to measure the effects of the work undertaken by the sector, Arcep publishes its [FttH network QoS Scorecard](#) on a regular basis. The network failure rates and connection failure rates that commercial operators report to the FttH infrastructure operator began to decrease in 2024, and are expected to continue to do so over time. In March 2025, two new indicators were added to monitor commercial operators’ compliance with industrial processes when installing connections.

Quality of service on the legacy copper network remains a major issue, particularly in those areas that will not have fibre access any time in the near future: it is vital that operators be able to provide services with a decent level of quality to the homes and businesses that still depend on it. In 2024, when implementing market analysis decisions, Orange increased the amount of the fines that it owed for failing to meet its quality of service obligations. Orange also began four workstreams to improve overall quality of service on the copper network.

Orange copper network switchoff: the first batch of close to 200,000 premises switched off commercially in January 2024 and technically in January 2025

In late 2019, Orange announced its plans for the technical switchoff of its legacy copper network, which was to take place gradually, starting in 2023 and coming to completion in 2030.

The year 2024 was marked by the first batch of commercial copper switch-offs in 162 municipalities, in Metropolitan and overseas France, representing close to 200,000 premises. The technical switchoff of this batch, i.e. the complete switchoff of all copper network services for every premise in the 162 municipalities in this batch, occurred in late January 2025. These steps created the ability to ramp up the switchoff plan, before beginning more industrial phases in 2026, with a view to a complete nationwide technical switchoff by the end of 2030. To support this transition, Arcep published three FAQs aimed at [users](#), [local authorities](#) and [businesses](#).

Arcep is overseeing this copper switchoff by ensuring that it take place according to a pace and to rules that safeguard users’ interests and guarantee satisfactory competition conditions between operators. One of the necessary conditions of the legacy copper network switchoff, stipulated by the regulatory framework, is ensuring the completeness of fibre deployments. Dialogue and transparency with local authorities are also crucial to the successful completion of the copper switchoff plan, and Arcep is committed to securing a good partnership with local officials and to the implementation of a governance process that involves all of the stakeholders.

Nationwide 4G access and increasing pace of 5G rollouts

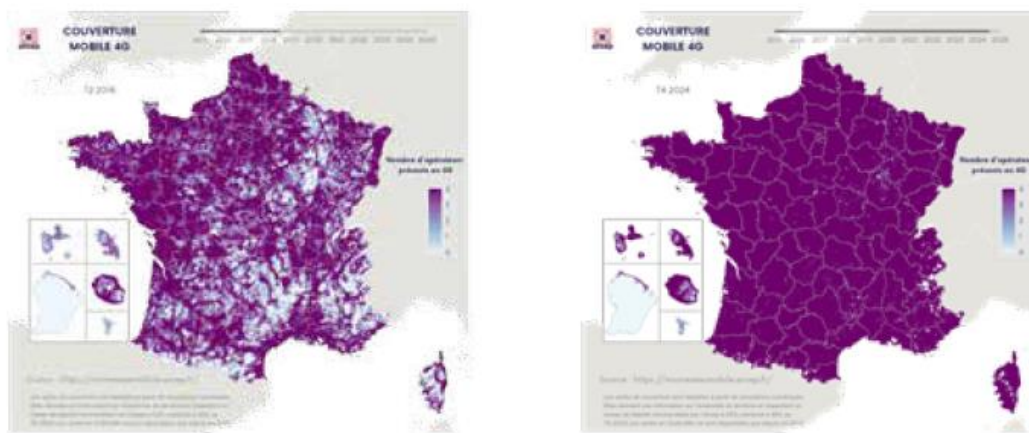
On 1 February 2024, Arcep published a [progress report on the New Deal for Mobile](#), which testifies to the significant strides that have been made in mobile coverage nationwide, along with an overall improvement in the quality of service measured since its launch, while noting that there is still room for improvement in rural areas and along railway lines.

At the end of 2024, 3,481 cell sites deployed under the New Deal for Mobile’s targeted coverage scheme were in service.

Operators also continued their 5G rollout efforts. As of 31 December 2024, they had activated between 11,805 and 20,594 sites 5G cell sites, depending on the operator – including 8,061 to 11,388 cell sites in the 3.5 GHz band, depending on the operator.

For the sake of transparency with citizens and elected officials, and to allow everyone to be informed about mobile operators' rollouts and obligations, Arcep makes data and mobile network performance monitoring tools available, and continues to enhance them on a regular basis.

Vision comparée de la couverture en 4G en France métropolitaine mi-2018 et fin 2024



Source : Arcep à partir des données transmises par les opérateurs.

Comparison of 4G coverage in Metropolitan France: mid-2018 vs. December 2024

Source: Arcep based on data provided by operators

Close to 50% of mobile cell sites are shared

Mobile network sharing consists of having several operators share all or a portion of the equipment that makes up their mobile networks. Pursuant to the adoption of the “REEN” Act on reducing digital technology’s environmental footprint, on 15 November 2021, Arcep’s annual report includes an account of the level of active and passive telephony infrastructure sharing in France.

As of 31 December 2024, of the 61,506 cell sites (masts, rooftops, towers) in Metropolitan France, 30,535 were being shared (or close to 49.6%). And 9,741 of them are being shared by all four operators.

Multiple frequency assignments in the overseas territories in 2024

2024 was marked by the award of licences to use frequencies in the 900 MHz band in Réunion. Arcep also launched the frequency assignment procedures for the 700 MHz, 900 MHz and 3.4 – 3.8 GHz bands in Guadeloupe and in Martinique, with spectrum being awarded in early 2025. Lastly, Arcep held public consultations in late 2023 and early 2024 on the procedure and rules for assigning the 900 MHz, 1800 MHz and 2.1 GHz bands in Mayotte, Guiana, Saint Martin and Saint Barthélemy, and in the 1800 MHz and 2.1 GHz bands in Réunion, Guadeloupe and Martinique, for which all or a portion of the frequency licences are set to expire on 30 April 2025. The early months of 2025 were also marked by the award of licences to use these frequencies.

Press distribution: Arcep continues its regulatory work

Committed to an ongoing dialogue with the press distribution sector, on 16 October 2024, Arcep held a meeting of the Consultative committee on press distribution (CoCoDip), a forum for dialogue between the regulator and the press distribution sector’s main representatives and actors, and held a public consultation on the conditions governing newsagents’ remuneration, with a [draft decision amending the methods for calculating and collecting newsagents’ commissions](#).

Lastly, Arcep also continues to work with the sector on implementing assortment rules and determining quantities delivered to points of sale, the aim being to give newsagents greater control over the types of publication they receive and thereby minimise the number of unsold copies⁵.

Postal sector regulation

In 2024, Arcep issued an Opinion⁶ on price changes in 2025, as part of the average 6.8% price increase planned by La Poste for that year, which complies with price caps set by the framework Decision of 15 June 2023. The average price increase applicable to universal service products as of 1 January 2024 was 8.3%.

In addition, on 28 February 2024, Arcep issued an Opinion on changes to the universal service postal services catalogue, in particular regarding the price list for the new “LR Liberté” bulk registered letter solution.

An annual report in three volumes: 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 (in French), provides an update on Arcep’s responsibilities, actions and decisions in 2024. It also details Arcep’s European and international activities, which have contributed to the construction of European regulation, and the global reach of French electronic communications regulation.

Volume 2: “Regulation in support of connected territories”, also being published today (in French), 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 2025 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.

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.

⁵ “More than half of all single-issue-sale print publications today remain unsold [...]. Last year, all of this led the rapporteur to recommend [...] that the liberalisation of press products that are not part of non-political or general news publications be put into effect. [...] This is precisely the goal of the 2nd “new” Article 5 of the Bichet Act (cf. National Assembly Cultural Affairs and Education Committee on report No. 2142 of 15 July 2019, p. 25).

⁶ [Arcep Opinion No. 2024-1593](#) of 18 July 2024.