

Press release

FRENCH TELECOMS MARKET

Annual “Telconomics” conference: investments in the electronic communications market continue to shrink, as network rollouts in multiple territories near completion

Paris, 28 May 2026

This morning, Arcep is delivering its annual “Telconomics” progress report on France’s electronic communications market to coincide with the publication of the 2025 annual observatory. It compiles key economic data on the French electronic communications market, along with the fixed and mobile price index for 2025.

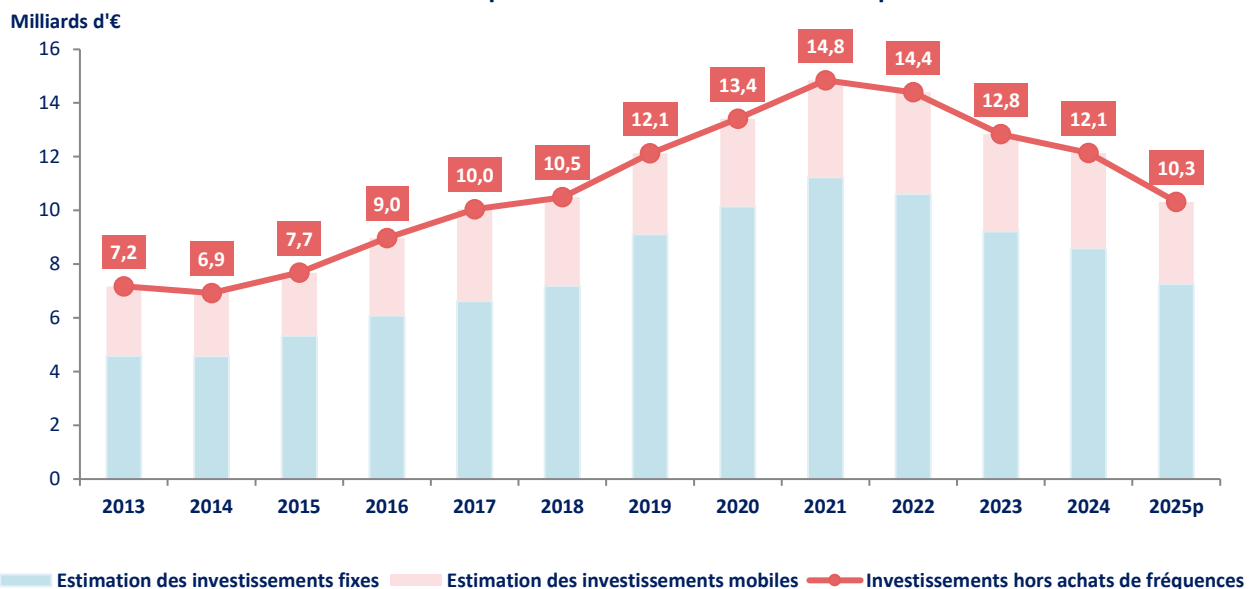
Operators’ spending totalled 10.3 billion euros in 2025. Electronic communications operators’ and mobile telephony infrastructure operators’ (towercos) investments in 2025, excluding spectrum, totalled 10.3 billion euros. These investments decreased for the fourth year in a row, and by 15% YoY in 2025. They nevertheless remain 1.5 times higher than investment levels observed before fibre deployments began to accelerate in 2015.

Among these investments, spending on ultrafast fixed and wireless local loop deployments stood at 5.1 billion euros, or 50% of total spending. The decrease in spending on ultrafast access (- 18.7% YoY) is due chiefly to decreased spending on both fixed (- 20.3% YoY) and mobile (- 16.2%) local loop deployments.

This decrease in spending is the result of:

- A decrease in the number of new premises being passed for fibre (FttH) each year: + 1.8 million in 2025 versus + 2.6 million in 2024, as deployments in multiple territories are reaching completion;
- A decrease in the number of new mobile network (i.e. mast) sites being deployed: 6,100 additional sites in 2025 versus + 8.300 in 2024.

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



Electronic communications operators and towercos’ investments, excluding frequencies

Operators' retail market revenue decreased by 1.6% in 2025, after four consecutive years of steady growth, chiefly due to a decline in mobile services revenue

Revenue in the mobile services market (excluding the connected objects/M2M market) decreased by 3.5% YoY after six straight years of growth. The average monthly revenue per SIM card also dropped: to 14.3 € excl. VAT (- 60 eurocents excl. VAT YoY). The price of mobile plans decreased by 2% between December 2024 and December 2025, due to a decrease in the price of mid-range plans.

Operators' fixed services market revenue remained relatively flat in 2025 (- 0.3% YoY) after two consecutive years of growth: + 3.4% in 2024 and + 2.0% in 2023. Revenue from broadband and ultrafast broadband services alone, which account for 85% of total fixed services revenue, continues to rise, albeit at a slower pace (+ 1.8%, or - 4.5 points YoY). The average monthly invoice for these subscriptions stands at 36.9 euros excl. VAT, which is virtually the same as in 2025: + 0.3 euro excl. VAT per subscription, compared to a 1.9 euro increase in 2024.

This levelling off can be attributed to two factors: first, users switching from copper to fibre plans whose prices can, in some instances, be higher. Second, to the price of catalogue prices for fixed service subscriptions – which apply only to new customers – which decreased by 2% between December 2024 and December 2025. This decrease is due a decrease in the price of double play bundles in 2025 that do not include TV services.

More than 80% of the 33 million internet subscriptions in France are FttH, and around four out of 10 SIM cards have been activated on 5G networks

The number of FttH subscriptions in France reached 27.1 million at the end of 2025, compared to only half that many four years ago. With close to 3 million additional subscriptions YoY in 2025, the number of FttH internet subscriptions increased substantially once again, and accounted for 82% of total internet subscriptions at the end of 2025 (+ 7 points YoY). Fibre plans thus continue to replace DSL broadband and ultrafast broadband plans (which totalled 4 million in 2025, decreasing by 2.3 million YoY).

In the mobile market, 32.9 million SIM cards were being used on 5G networks as of Q4 2025. The number of SIM cards activated on 5G networks grew by 8.3 million YoY. They represent 39% of the 84.9 million mobile cards in service at the end of 2025 (+ 10 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 17.9 Gb of traffic a month in 2025, up 1.4 Gb YoY.

The “Telconomics” event provides Arcep with an opportunity to:

- Present the key figures for France's electronic communications market in 2025;
- 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, 2G and 3G networks, along with developments in connectivity for businesses;
- Highlight the work that Arcep is doing on the future digital environment, through its newfound responsibilities in cloud computing and data, but also in the areas of artificial intelligence and the environmental issues surrounding ICT.

Associated documents

- [Annual observatory for 2025](#)
- [Change in the price index for fixed and mobile services in 2025](#)
- [Open datasets](#)
- [Press conference presentation \(in French\)](#)

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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 electronic communications, postal and press distribution networks in France

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