

Press release

ANNUAL REPORT

Arcep publishes the first two volumes of its annual report

Paris, 2 July 2026

Today, Arcep is publishing the 2026 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 2025, 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 (in French and English) on 16 July and presented at a press conference.

New technologies, new user expectations and new responsibilities for Arcep: with its nine strategic objectives and three courses of action unveiled in January 2025, 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**. To deliver an account of the latest regulatory issues, and of Arcep’s progress in achieving its strategic objectives, the contents of volumes 1 and 2 of the Arcep annual report have been revised for this 2026 edition.

What are the highlights of the work that Arcep carried out in 2025?

From Arcep’s most recent workstreams: regulation of cloud services and data sharing, environmental impact of ICT, and press distribution

Supervising egress fees and provider switching charges

On 20 February 2025, pursuant to the Law on Securing and Regulating Cyberspace, Arcep adopted a Decision proposing to set the maximum amount that customers could be charged in egress fees when switching cloud service providers at zero euros. In accordance with the proposal from Arcep, France’s Minister Delegate for Artificial Intelligence and Digital Affairs set this amount at zero euros, in her Order dated 17 November 2025, published on 30 November 2025.

Sharing knowledge and taking action to reduce ICT’s environmental footprint

An active contributor to the ITU (International Telecommunication Union), Arcep worked to improve assessments of the environmental footprint of information and communication technologies (ICT) on an international scale. By building on pioneering work carried out since 2021, it oversaw and drafted a [new version of Recommendation ITU-T L.1450](#), which specifies the technical standards for assessing the impacts of the ICT sector.

Arcep also published the [fifth edition](#) of its annual “Achieving digital sustainability” survey, presenting data collected from digital industry actors, to track the evolution of their environmental impact in France.

Published in May 2026, the [report on “Generative AI: environmental issues and challenges”](#) delivers a summary of current understanding of the environmental impact of generative AI, along with an account of the work carried out in 2025 with PEReN to identify the main factors that influence the energy consumption of several AI models’ prompts.

Working to update press distribution and make the profession of newsagent more attractive

In late 2025, Arcep adopted a decision setting the conditions for newsagents' remuneration for the sale of daily and non-daily publications¹. This Decision includes measures for revalorising the remuneration for specialised newsagents, which were published for public consultation in [summer 2025](#). The results of that public consultation were presented at a meeting of the Advisory committee on press distribution (CoCoDip), on 12 November 2025, during which Committee members made additional observations.

Forward-looking and pro-consumer workstreams:

“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.

Accompanied by a Scientific Committee, the purpose of this cycle of inquiry is to prepare Arcep for upcoming challenges in network regulation, and to steer its actions accordingly. Three topics were the focus of briefing notes, and webinar presentations in 2025:

- [“Electronic communications networks' resilience”](#) (21 May 2025)
- [“AI and electronic communications networks”](#) (26 June 2025)
- [“Choose your tech”: viewing electronic communications networks through the lens of digital practices”](#) (26 September 2025)

A handbook for businesses, to help enterprise and public sector users choose the right digital solutions

The fruit of a collaboration with some 20 partners, representing client enterprises and digital industry actors, public administrations and service providers, this [practical guide](#) covers not only connectivity, but also the latest issues surrounding enterprises' digital transformation, such as protecting themselves against cyberthreats, the use of cloud computing services and eco-friendly practices.

Electronic communications and postal service regulation assignments:

Operator investments and revenue decreasing

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. At its annual [“Telconomics” press conference](#), on 28 May of this year, Arcep presented its [annual market observatory](#), which compiles key economic data on the French electronic communications market, along with the fixed and mobile price index for 2025.

Close to 95% of households in France passed for fibre at the end of 2025 – Arcep monitors operators' compliance with their commitments and regulatory obligation of complete deployment

Electronic communications operators and towercos' combined investments totalled **10.3 billion euros in 2025**, marking a 15% decrease year on year, due to:

- 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.

At the end of 2025, 94.3% of all premises were eligible to subscribe to an FttH service, with 2.6 million households in France still remaining to be covered.

¹ [Arcep Decision No. 2025-2214 of 9 December 2025](#)

Arcep is responsible for monitoring compliance² with the fibre deployment commitments that operators have made in the less densely populated parts of the country covered by private sector initiative (called **AMII**³ and **AMEL**⁴ areas in French). In April 2025, as part of its monitoring of the new commitments that Orange had made in March 2024 regarding AMII areas, the Arcep body responsible for settling disputes, legal proceedings and investigations (aka “RDPI”) enjoined Orange to comply with its commitment on delivery times for premises classified as “connectable upon request”⁵. Arcep is also responsible for monitoring the regulatory completeness of FttH deployments.

Ongoing work on fixed network quality of service

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 eight out of 10 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, to manage and monitor service calls. In 2022 and 2023, Altitude Infra, XpFibre and Réseau Optique de France (Iliad Group) notified their network rehabilitation plans to the Authority, which works vigilantly to ensure that these plans are successfully executed, and monitors the evolution of the quality of these networks on an ongoing basis, in concert with the affected operators. In November 2025, Arcep’s “RDPI” body enjoined Réseau Optique de France to complete the installation of all of the shared access points (SAP) needed to cover all of the premises that depend on the 93 large-capacity SAP operators, by 31 December 2026, as its rehabilitation plan had fallen behind schedule.

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 decreased up to 2024, and held steady in 2025. 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.

Orange copper network switchoff: in 2025, technical decommissioning of the lines in 162 municipalities (batch 1), commercial closure in 763 municipalities (batch 2)

In late 2019, Orange announced its plans for the switchoff of its legacy copper network, which was to take place gradually, starting in 2023 and coming to completion in 2030. Against this backdrop, and as part of the rules that Arcep defined for implementing this work, 2025 was marked by:

- technical decommissioning – i.e. the end of service – in a first batch of municipalities set by the Orange switchoff plan (162 municipalities);
- commercial closures – i.e. the end of the sale/marketing of new access lines – in a second batch of municipalities (762 municipalities).

The industrial phase of this plan, which began in 2026, will make it possible to migrate copper access lines to new ultrafast technologies, starting with FttH, in successive waves of commercial closures and technical decommissioning, of up to 10.5 million premises a year, up to 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

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*”)

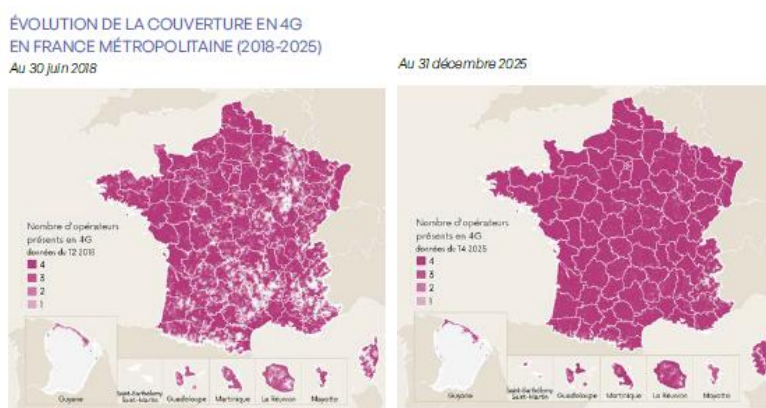
⁵ Decision No. 2025-0608-RDPI: https://www.arcep.fr/uploads/tx_gsavis/25-0608-RDPI.pdf

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

At the end of 2025, 4,109 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 2025, they had activated between 115,875 and 22,499 sites 5G cell sites, depending on the operator – including 10,501 to 13,508 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.



Evolution of 4G coverage in Metropolitan France: 2018 to 2025

As of 30 June 2018

As of 31 December 2025

Source: Arcep based on data provided by operators

More than 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 of 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 2025, of the 63,826 cell sites (masts, rooftops, towers) in Metropolitan France, half (or 32,426 to be exact) were being shared. Of these, 10,115 are being shared by all four operators.

Preparing for future frequency assignments

All of the current frequency licences issued to mobile operators in Metropolitan France – i.e. licences to use frequencies in the 700 MHz, 800 MHz, 900 MHz, 1800 MHz, 2.1 GHz, 2.6 GHz and 3.5 GHz bands – have expiry dates ranging from 2030 to 2035. Added to which, new frequency bands, notably the 3410 – 3490 MHz, 1.4 GHz and 6 GHz bands, could be allocated to the operation of mobile networks in the medium term.

The reassignment of those frequencies carries strategic consequences for the sector. To ensure that the terms and conditions governing the reassignment of these frequencies can be established far enough in advance of the expiration of existing licences, and provide the sector with clarity, in 2025, Arcep began work on this matter, which included a public consultation published in October 2025 on this issues surrounding future frequency assignments in Metropolitan France.

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Postal sector regulation

In 2025, Arcep issued an Opinion⁶ on price changes in 2026. These changes correspond to the first year of implementation of the multiannual price caps set by Arcep for 2026-2029 in its Decision of 10 June 2025. It was ascertained that the average 7.4% price increase planned by La Poste for 2025 complies with price caps set by the framework Decision of 15 June 2023.

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 2026 edition will be published (in French and English) on 16 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 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

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

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