arcep les réseaux comme bien commun

Telconomics

2026 edition

28 May 2026

Table of contents

01 **Electronic communications market: key facts and figures**

02 **Core workstreams for electronic communications market regulation**

03 **Building tomorrow’s digital world**

04 **Annexes**

01

Electronic communications market: key facts and figures

Key electronic communications market figures for 2025

Operators' revenue
(retail market)

€37.5 billion -1.6% ↘

Investments, including Towercos
(excl. spending on spectrum)

€10.3 billion -15% ↘

Number of broadband and ultrafast BB subscriptions

33 million (**o/w 82% fibre**)

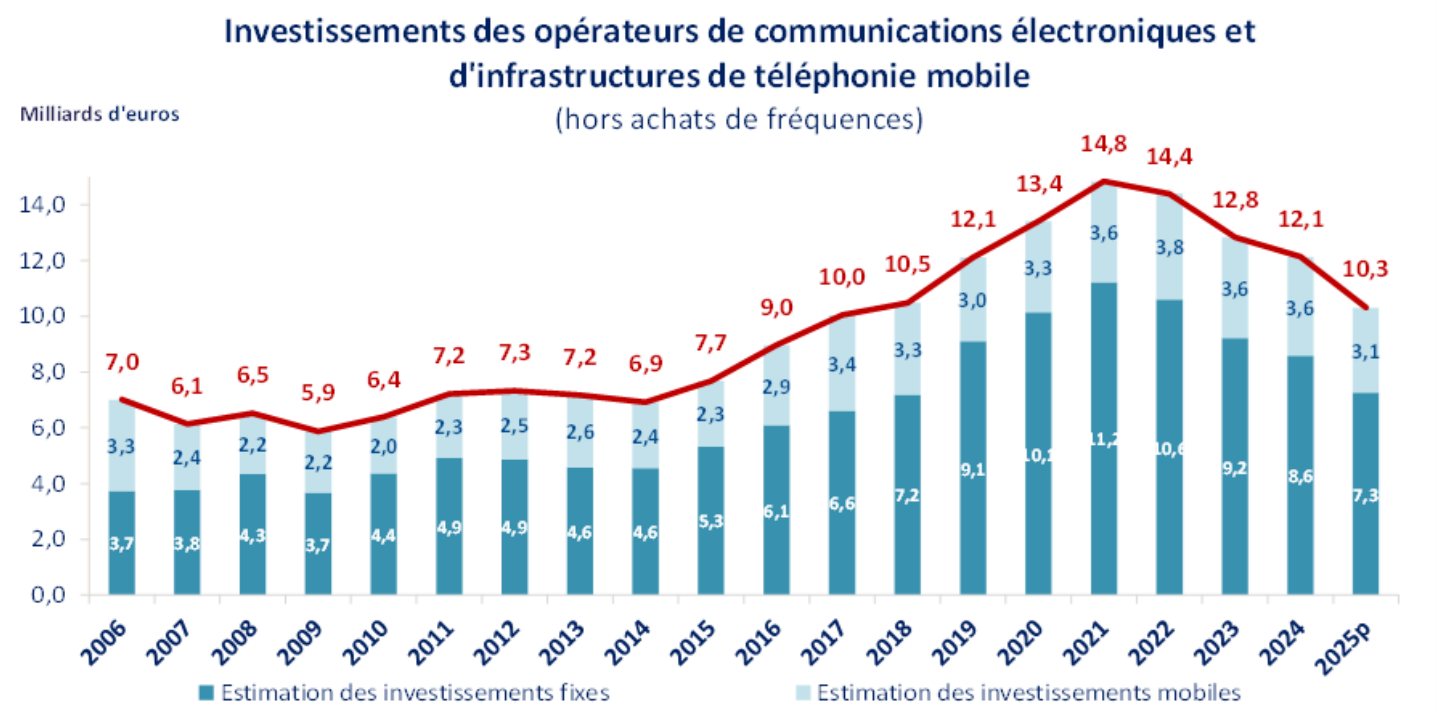
+1.2% ↗

Number of SIM cards

84.9 million (**o/w 32.9 million 5G**)

+1.2% ↗

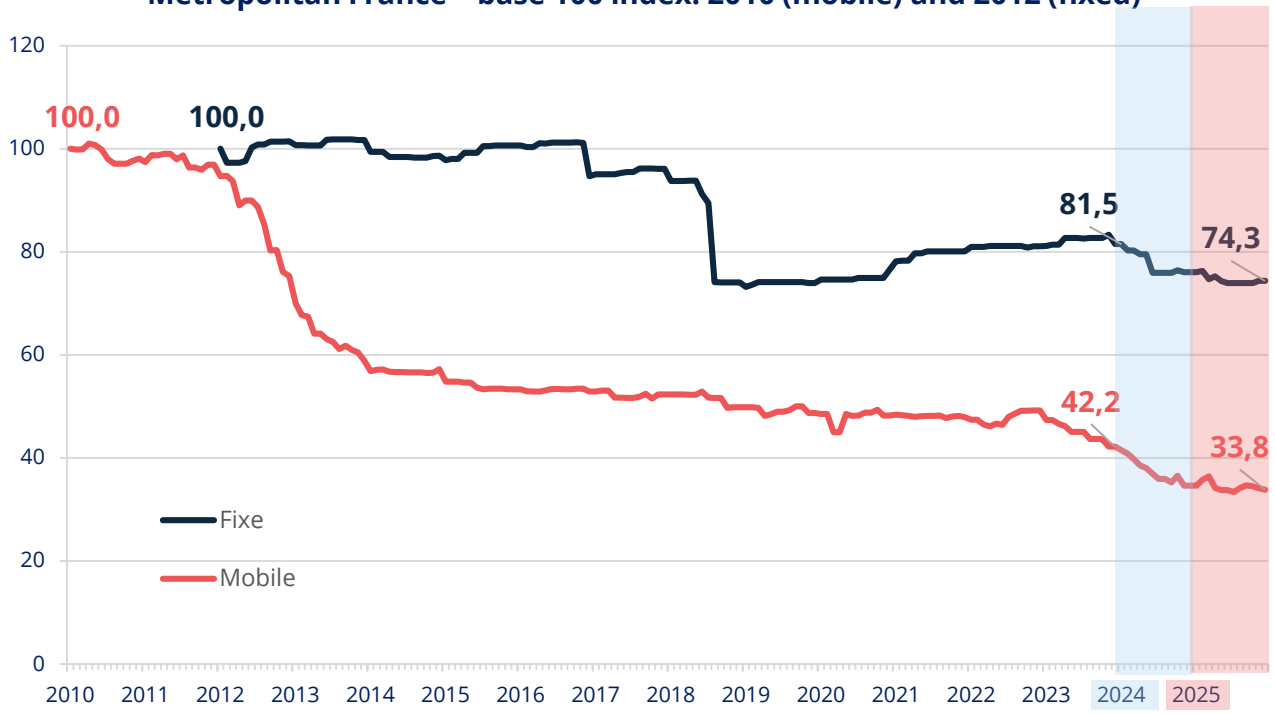
Decreasing investment, as deployments near completion



- **10.3 billion euros invested by operators** (incl. Towercos), or 15% less than in 2024.
- 5.1 billion euros invested in fixed and mobile ultrafast local loops, down 19% YoY, due to decreasing spending on fibre (-20%) and 4G and 5G (-16%) local loops.

Decreasing fixed and mobile service prices

Change in the price of consumer fixed and mobile services in Metropolitan France – base 100 index: 2010 (mobile) and 2012 (fixed)



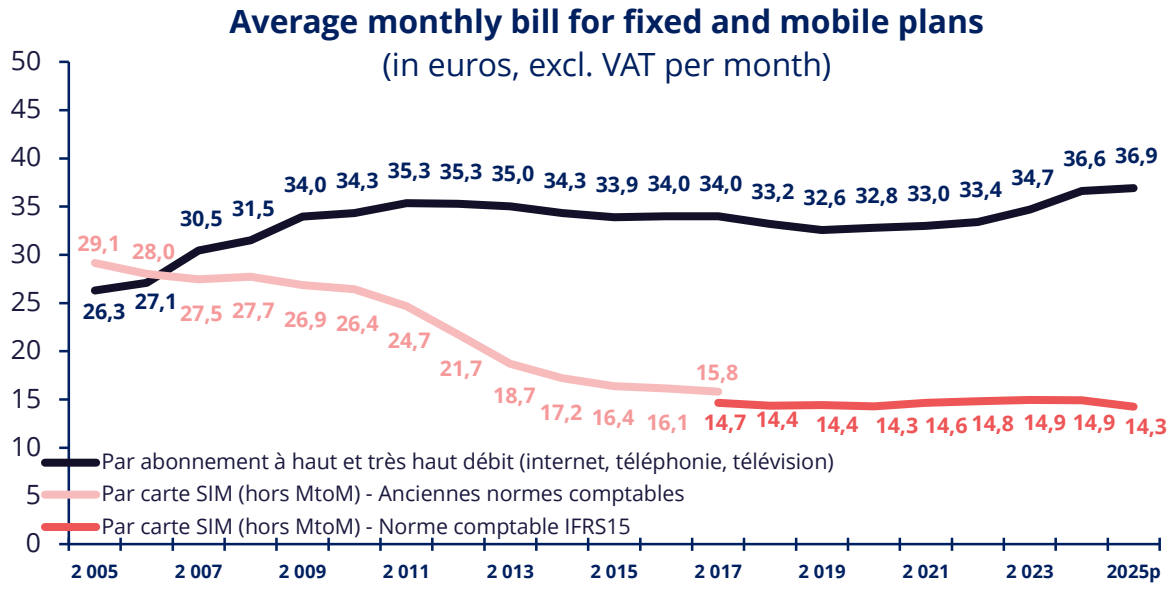
Catalogue price of fixed services decreased by an average 2% between December 2024 and December 2025

- Versus -7% between December 2023 and December 2024
- Rollout of new entry-level broadband and ultrafast broadband double play plans (without TV services) at cheaper prices than before

Catalogue price of mobile services decreased by an average 2% between December 2024 and December 2025

- Versus -18% between December 2023 and December 2024
- Decrease in the price of certain mid-range plans (100 Gb data allowance)

Monthly invoice: down for mobile, stable for fixed plans



- Average monthly internet bill tending to level off: €**36.9 excl. VAT a month, or +0.9% YoY,** versus +5.5% in 2024 and +3.9% in 2023
- Average invoice per SIM card is decreasing: €**14.3 excl. VAT a month, or -4.3% YoY** after being virtually unchanged for three years

Fibre rollouts continue

FttH deployment

Rollouts continued in 2025, with **around 1.8 million additional homes passed for fibre.**

2.6 million homes remain to be passed, including the most complex installations.

94.3% of all premises in France are eligible to subscribe to an FttH service, and rural areas have closed the gap with urban areas.

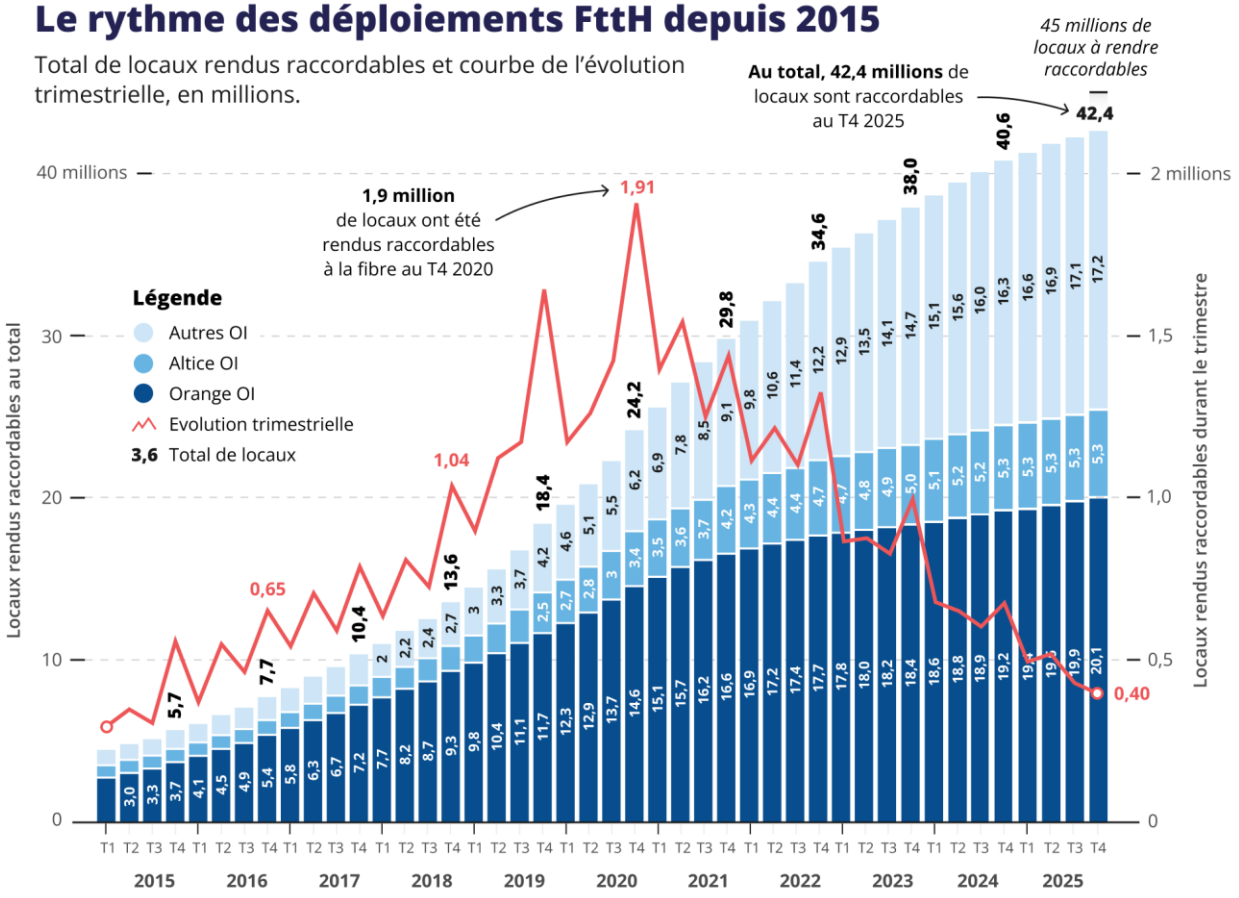
FttH rollout forecasts

Publication of the interactive “geographical survey of FttH deployments”
excl. VATtps://relevegeographique.arcep.fr/

FttH deployment schemes launched in every territory in France, including overseas.

Le rythme des déploiements FttH depuis 2015

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

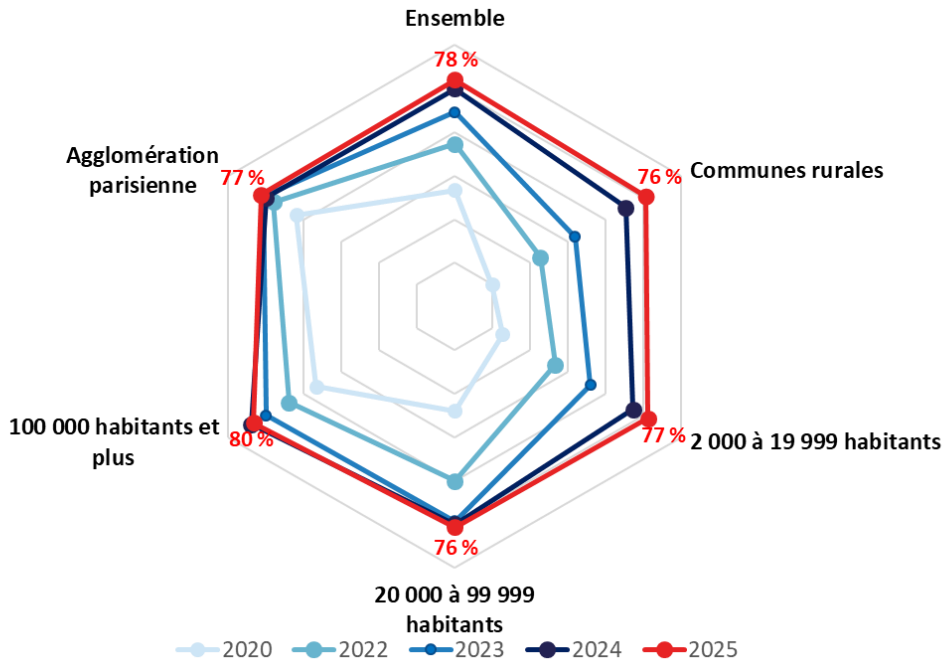


Note méthodologique : en raison de double-déploiements, l’addition des locaux rendus raccordables par opérateur peut excéder légèrement le total de locaux raccordables tous opérateurs confondus.

High rate of fibre subscription, regardless of municipality size

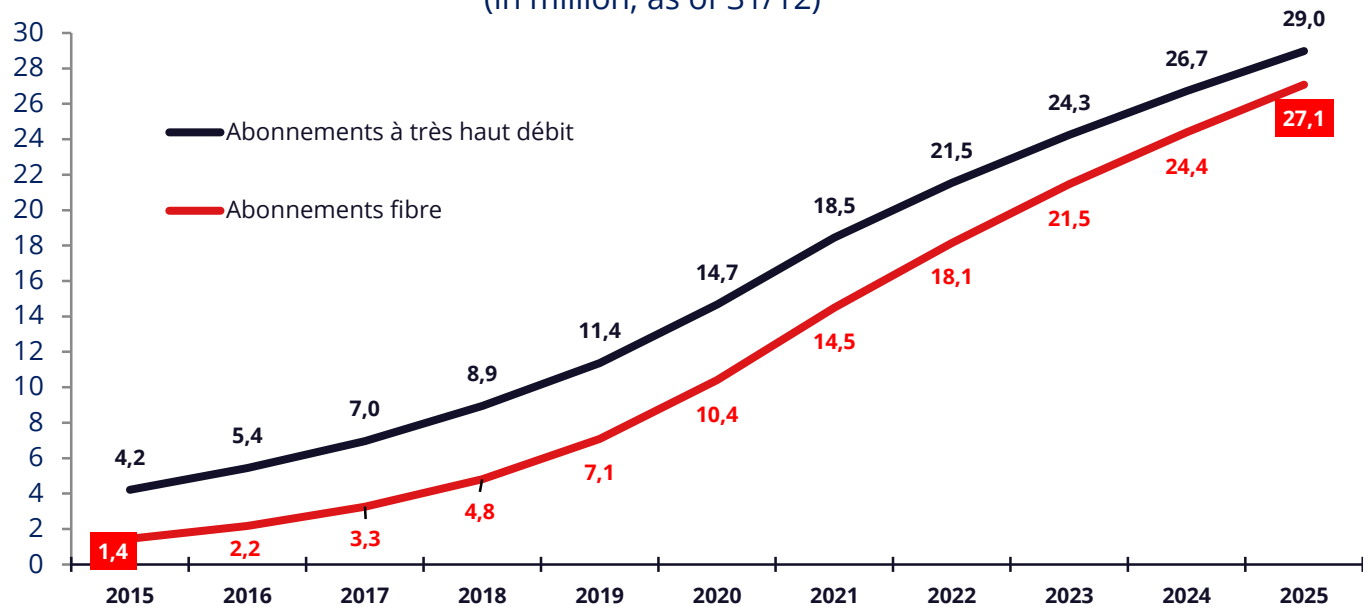
Percentage of residents who subscribe to a fibre or cable plan, by municipality size – June 2025

- Scope: population with an internet connection at home, in% -



Steady growth in FttH subscriber numbers

Number of ultrafast access and FttH subscriptions in France
(in million, as of 31/12)



End of 2025, 82% of all internet subscriptions in France were FttH

- 27.1 million FttH subscriptions, or +2.7 million YoY
- 29.0 million ultrafast access subscriptions, or 88% of all internet subscriptions

Progress in mobile connectivity

Ongoing implementation of the *New Deal for Mobile*

- Targeted coverage mechanism: 4,109 sites in service at the end of 2025 (of the 5,122 identified)
- “Good coverage” for voice/SMS (2G/3G): between 99.6% and 99.8% of the population covered
- 4G: More than 99.9% of mobile sites now 4G-capable

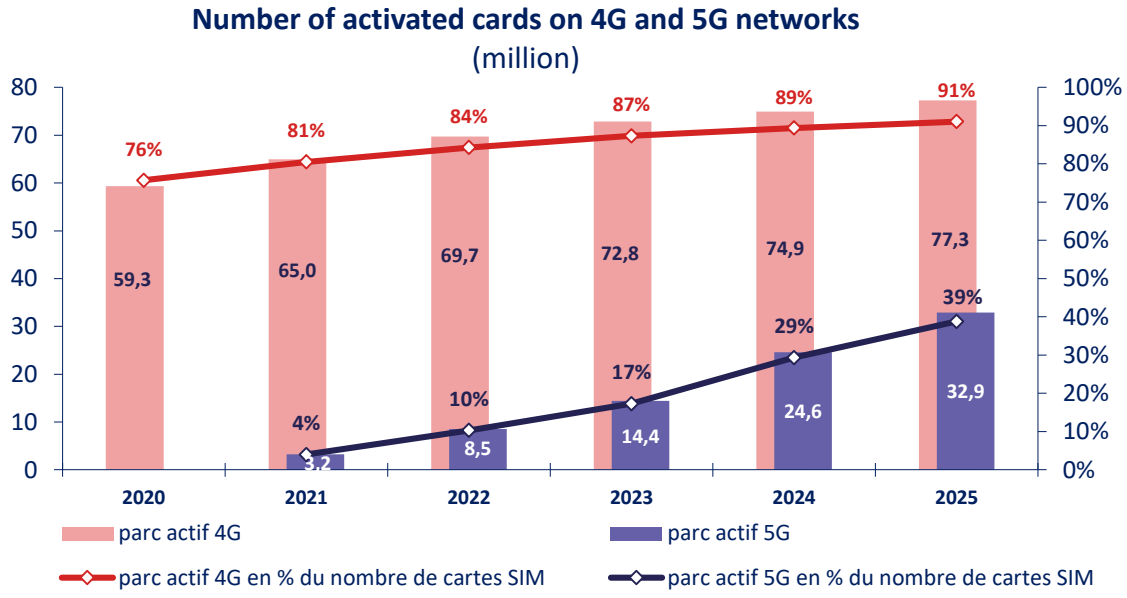
Growing ubiquity of 4G+

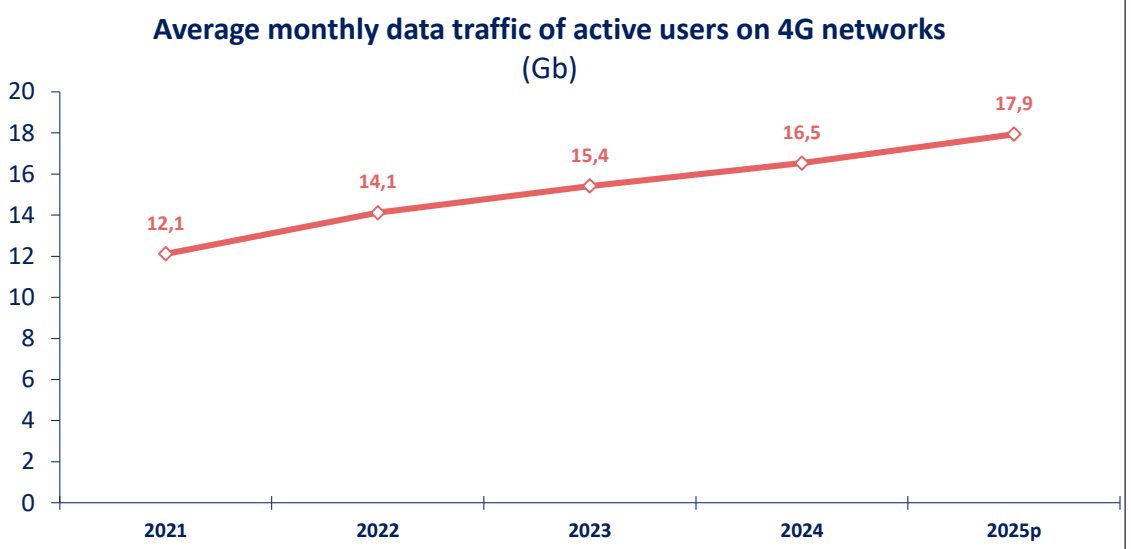
- At the same time, ongoing speeds upgrades to existing sites: 95% of all sites on average, end of 2025.

5G rollouts continue

	Bouygues Telecom	Free Mobile	Orange	SFR
Number of 5G sites end of 2025	17,636	22.499	15,875	16,089
progress since 31/12/2024	*+ 3,638*	*+ 1,905*	*+ 4,070*	*+ 2 ,123*
sites using the 3.5 GHz band	*10.513*	*10.501*	*13.508*	*10.507*

Users' mobile connectivity





- 5G: 32.9 million active users, or 39% of total SIM cards (+10 points YoY)
- 4G: 77.3 million active users, or 91 of total SIM cards (+1 point YoY)

- Average monthly data traffic per 4G user: 17.9 Gb (+1.4 Gb YoY)
- Average monthly data traffic per 5G network user: around 30 Gb

02

Core workstreams for electronic communications regulation

Core workstreams for electronic communications regulation



Ensure regulation evolves apace with the market situation



Prepare the future of regulation



Monitor the financial conditions for FttH network access and its quality of service



Prepare future frequency assignments in Metropolitan France



Support businesses in their digital infrastructure needs

Ensure regulation evolves apace with the market situation

Legacy copper network switchoff: work continues to accelerate

- **2024-2028:** Through its market analysis decisions, ARCEP creates a framework for the switchoff of the Orange copper network, with strict rules for protecting users and competition.
- **Since January 2026:** industrial phase of the Orange switchoff plan.
- **To date:** commercial closure of more than 21 million premises; technical closure of more than 1 million premises.
- **Key challenges:** Guaranteeing quality of service on the copper network until complete switchoff, ensuring the seamless transition to ultrafast access (and FttH in particular). Geographically modulated unbundling rate to accelerate this transition.

Arcep regulation evolves as market competition develops

- To this end, in the market that enables alternative operators to sell broadband and ultrafast broadband services using a third-party operator's infrastructure, regulation ended on 31 March 2026 after a 15-month transitional period.

  In recent years, Arcep was able to ascertain increased competition in the market thanks to the widespread availability of fibre and the development of alternative offers.

Reflection underway on the future of regulation

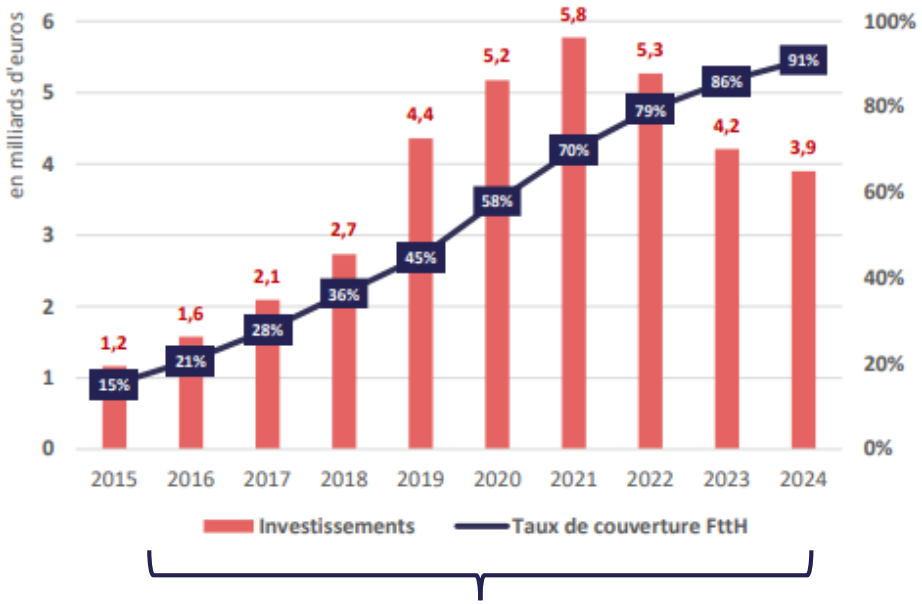
Assessment of the symmetric regulatory framework

Assessment of the symmetric regulatory framework in 2025

- The European code requires Arcep to evaluate the results of symmetric obligations, within five years of their adoption, and to notify this evaluation to the Commission after having submitted it to public consultation.
- **As the European Commission had no comments on this evaluation in its opinion, the definitive assessment was published in early April 2026.**

The symmetric framework is relevant and must be fully maintained

- The **stability of the symmetric regulatory framework** is essential to the ability to (i) **promote investment**, (ii) guarantee the ongoing deployment and (iii) the future-proofing of FttH networks, and (iv) achieve European goals.
- **Arcep has not identified any elements that would suggest a change in economic conditions that would challenge the need for symmetric regulation, any time in the near future.**



Evolution of operators' **investments** in ultrafast local loops and percentage **of premises covered** by an FttH network between 2015 and 2024 (source: Arcep)

Ensuring FttH network quality of service

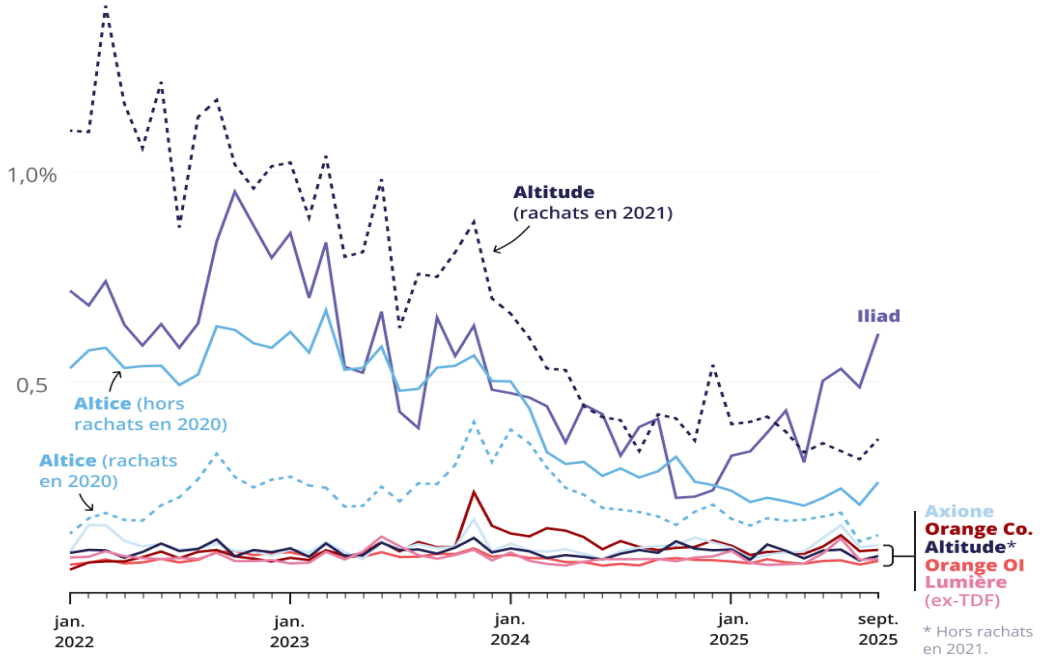
Arcep actions on network quality of service focused on two main pillars

- **Improve the quality of service calls**, by strengthening oversight and correcting defective work
- **The rehabilitation of networks with the highest failure rates** (rehabilitation plans for Xp Fibre, Altitude infra and Réseau Optique de France networks)

FttH network QoS scorecard

- **A scorecard for monitoring the actions stakeholders are taking, and assessing their effects over time**

- **Takeaways from the 7th edition (published in February 2026):**
  - **Stabilisation of operational quality on most networks** (national failure rates holding steady at between **0.1 and 0.15% for several quarters**)
  - **Persistent issues on certain networks** that are the target of rehabilitation plans



Evolution of the monthly failure rates that ISPs report to infrastructure operators, aggregated by operator parent company

Monitoring the financial conditions governing access to FttH networks

Arcep designed a benchmarking tool for analysing the operational maintenance costs of FttH PIN, to facilitate price re-negotiations

Several infrastructure operators that manage FttH networks in those areas in France where public-initiative networks (PIN) are deployed, along with their public service contractors, have warned of the financial difficulties threatening the ability to maintain these networks in proper operating order. To obtain an objective assessment of operational maintenance costs, and to facilitate price re-negotiations for the networks that require them, **Arcep is in the process of designing a tool for analysing PIN operational maintenance costs.**

July 2025

Public consultation No.1

This consultation made it possible to obtain an objective view of the situation, by establishing a shared nomenclature of the costs and compiling a list of those costs.

Arcep received 43 responses from stakeholders.

September 2025

Cost modelling work

The information collected provided the foundation for the drafting of an operational maintenance cost model.

Multiple workshops were held with operators.

March 2026

Public consultation No.2

The aim of this consultation was to define an analytical grid, to propose a cost model, along with a method for carrying costs over to prices.

A modelling spreadsheet was included with the public consultation.

May 2026

Finalisation of the cost model

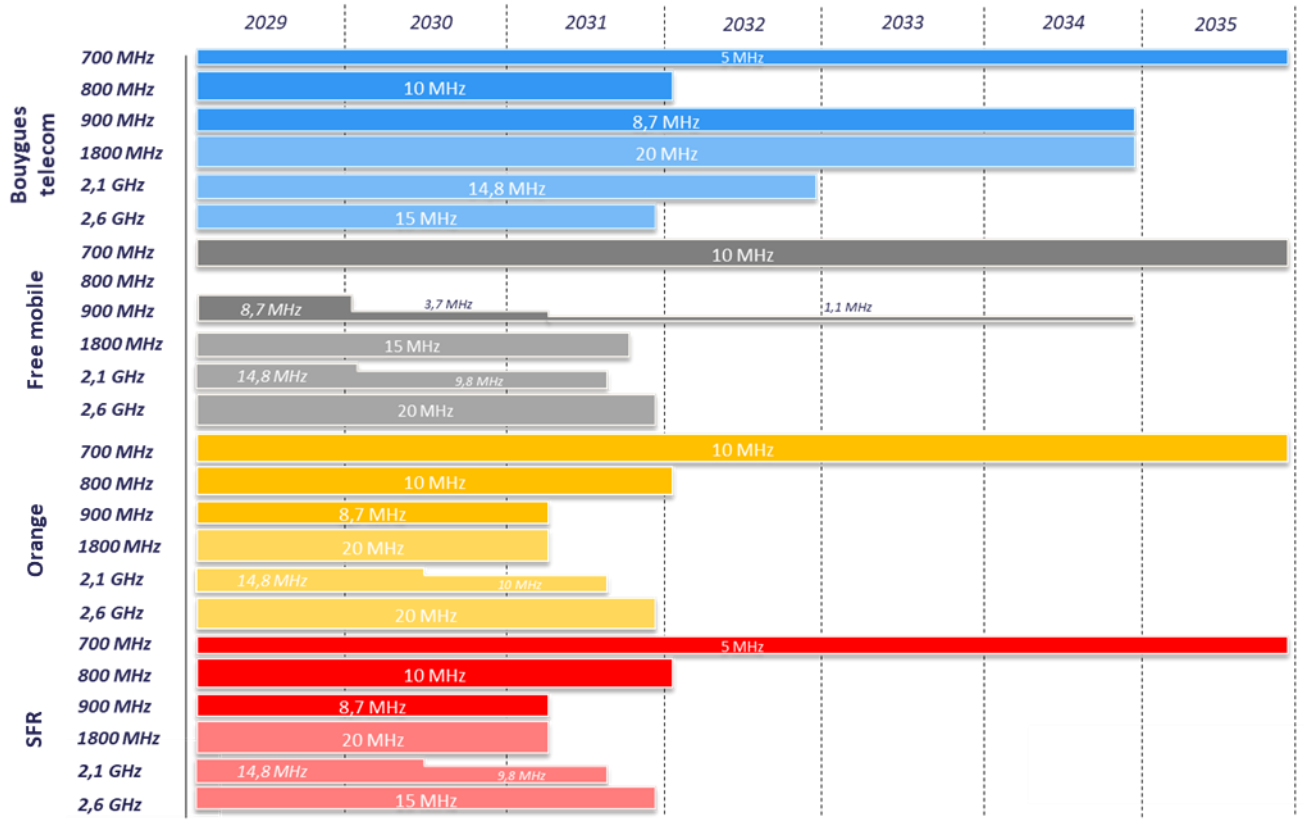
Feedback to the consultation helped in finalising the cost model..

This model served to guide negotiations by proposing objective cost elements.

When costs are not recovered by the prices in effect, pricing conditions must be adjusted and agreements amended.

Future frequency assignments in Metropolitan France

- **Critical deadlines (2030-2035):** every mobile frequency licence in Metropolitan France will be expiring in the coming years
- **New bands in view:** new bands are likely to be allocated (upper 6 GHz, 1.4 GHz), creating new opportunities for mobile networks
- **Public consultation launched:** Arcep queried the sector's stakeholders (Oct. 2025 – Jan. 2026), whose responses are now publicly available
- **Work underway:** Arcep continues to work on the rules and procedures of future allocations, to achieve a balance between predictability for operators, competition, continuity of service, and nationwide coverage



Expiry dates for mobile frequency licences in Metropolitan France

Shutdown of 2G and 3G networks

- **Operators' sunset timetable:**
  - **2G:** gradual shutdown over the course of 2026
  - **3G:** end of 2028 for SFR and Orange and end of 2029 for Bouygues Telecom
- **Arcep actions:**
  - **Quarterly monitoring** of the number of SIM cards installed in devices that are only 2G/3G-compatible
  - **Examining the steps being taken by operators** to communicate with customers and assist them
  - **Hosting multilateral meetings** with stakeholders
  - **Keeping consumers and enterprises informed** via a dedicated space on the Arcep website
  - **Assessment of the carbon impact and impact on coverage** via the work of the Committee of Technical Experts on mobile networks

Quarterly observatory of SIM cards used in devices that are only 2G and/or 3G-network compatible

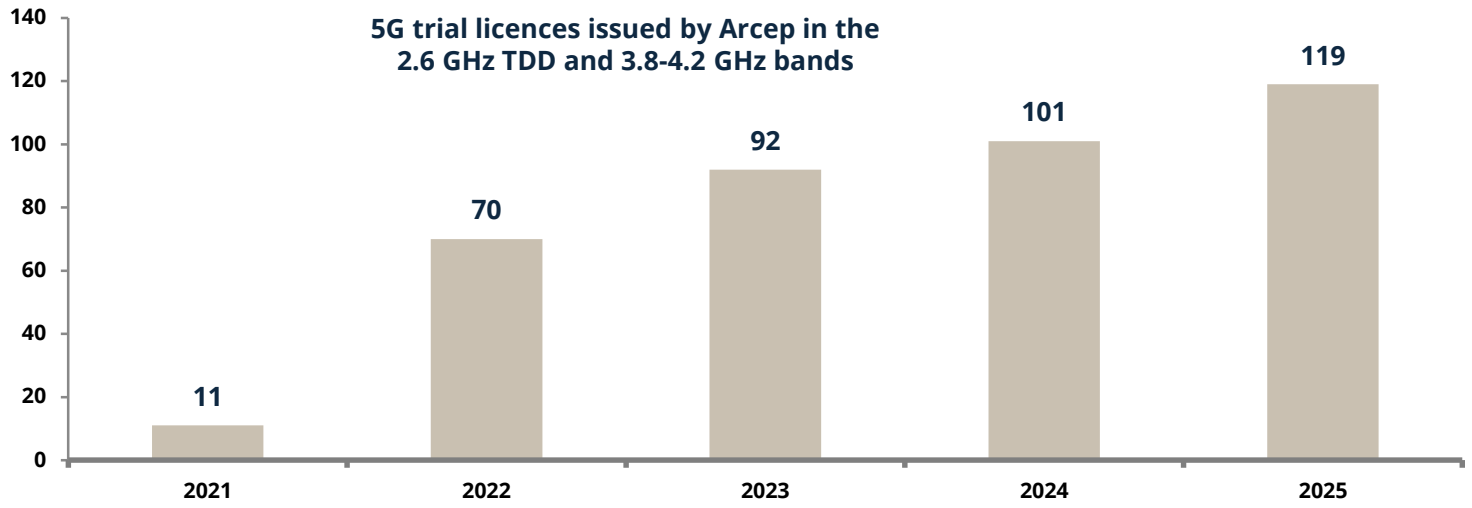
Voice/SMS/mobile internet usage			
Total SIM cards (million)	End of June 2025		End of December 2025
2G	1.63	- 13.1%	1.42
3G/2G	1.07	- 8.4%	0.98
Total	**2.70**		**2.40***

*representing 3% of all activated SIM cards

Machine to Machine services (excl. automakers' on-board SIM cards in vehicles)			
Total SIM cards (million)	End of June 2025		End of December 2025
2G	1.22		0.99
3G/2G	1.97	- 18.7%	1.82
Total	**3.19**	- 7.5%	**2.82****

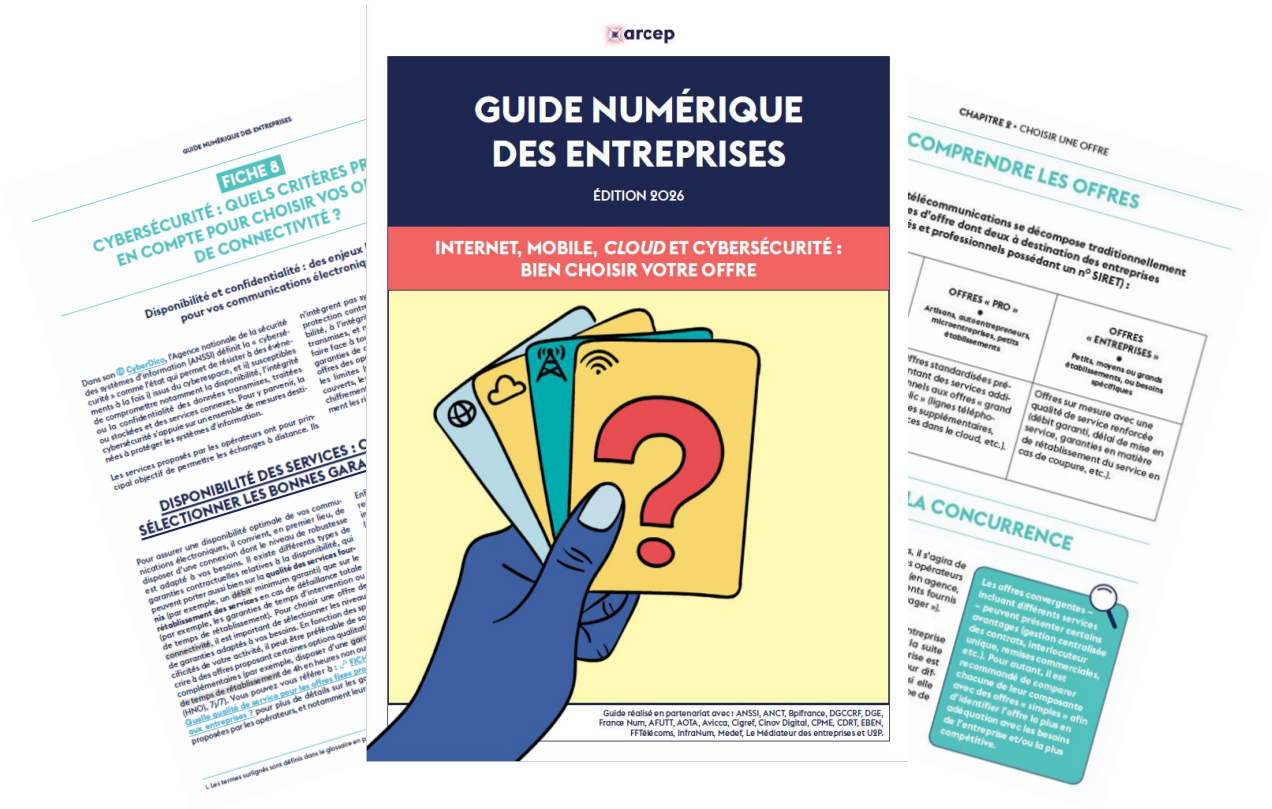
**representing 11% of all activated SIM cards

Supporting businesses in the digital infrastructure needs



- Businesses are steadily adopting solutions that enable them to **digitalise their productive assets through the use of 4G and 5G enterprise-grade networks**, first through trials and then through long-term investments.
- **Frequencies have been available for long-term assignments for enterprise networks since 2019 in the 2.6 GHz TDD band, and since December 2025 in the 3.8 – 4.2 GHz band.** Today, 20 “verticals” have licences to use frequencies, covering 65 areas in Metropolitan France.

Publication of a Digital handbook for businesses



Arcep publishes a practical guide for businesses, to help them choose the right internet, mobile and cloud computing services

The guide is a set of factsheets that provides businesses with a step-by-step guide to help them:

- Understand their digital infrastructure needs;
- Choose the right connectivity and cloud computing plans;
- Manage their relationship with electronic communications providers;
- Anticipate changes resulting from the decommissioning of certain older networks and services;
- Connect their premises to the fibre network;
- Discover business applications for wireless networks;
- Improve the quality of their fixed and mobile connections.

The handbook was produced thanks to contributions from close to twenty partners.

03

Building tomorrow’s digital world

Building tomorrow’s digital world



Assuming Arcep’s newfound responsibilities in regulating cloud computing and the data economy



Analysing the effects of the AI surge, and ensuring that its development benefits everyone



Improving and sharing knowledge of the environmental impact of digital technology

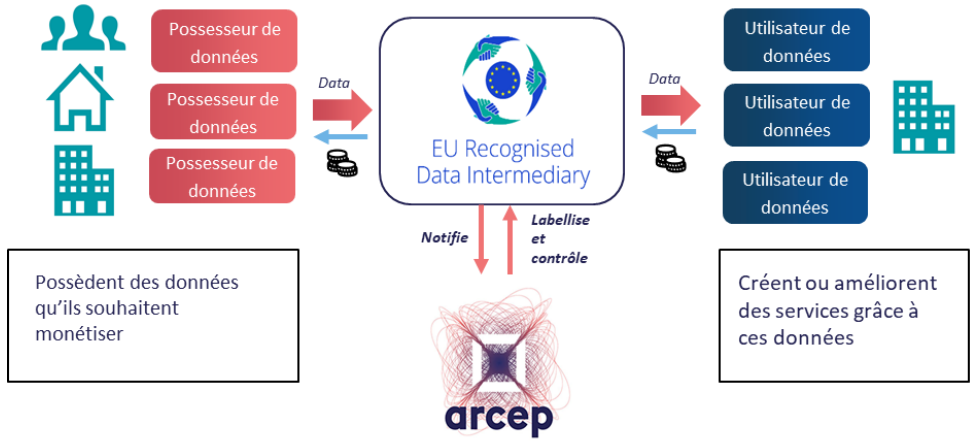
Arcep's new responsibilities

Regulating cloud computing

- Impediments **to the proper functioning of the cloud computing market** were identified (ADLC 2023, BEREC 2024)
- Arcep is responsible for creating a smooth-functioning market, in preparation for the **Data Act,** which includes measures for making it easier to switch cloud providers and develop the use of multi-cloud options.
- The SREN Act tasks Arcep with **lifting barriers**:
  - technical (interoperability and portability)
  - commercial (egress charges and provider switching fees)
- Arcep is expected to be appointed the competent authority for the implementation of the Data Act in 2026.

Data economy

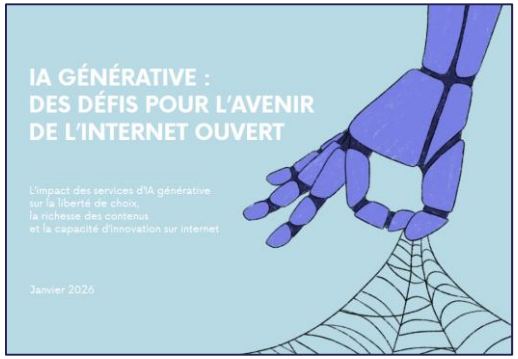
- The Data Governance Act (DGA) creates the status of neutral, trusted **Recognised EU Data Intermediary,** at the heart of data exchanges, and establishes the rules they must follow.



- Arcep is preparing to implement DGA provisions on **accessing and sharing connected objects' data.**

Analysing the effects of the AI surge and ensuring its development benefits everyone

Report: “Generative AI: challenges for the future of the open internet”



Report: “Generative AI: what are the environmental challenges?”

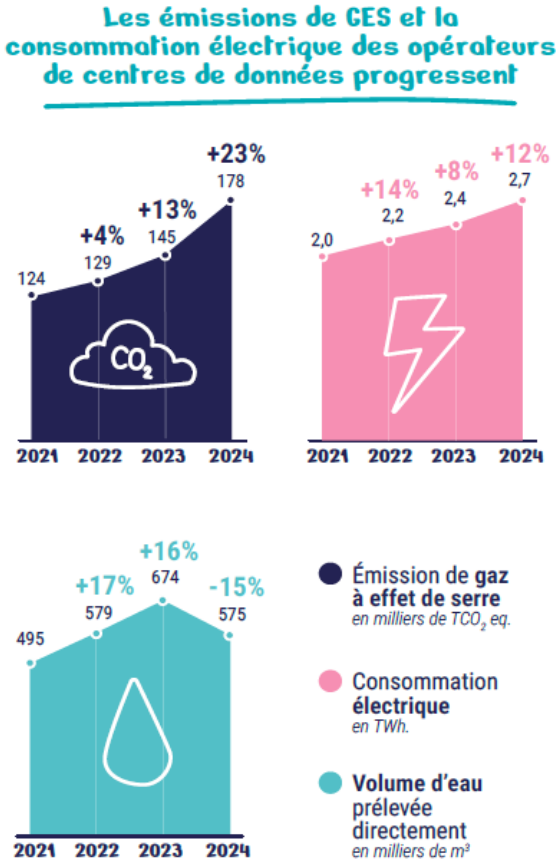


Arcep contributes to the implementation of European regulations for ensuring open digital ecosystems and AI systems

- **Arcep is involved at the European level, within BEREC and the European Data Innovation Board (EDIB):**
  - Participation in the High-Level Group for the implementation of the Digital Markets Act
  - Analysis of digital market evolution (Co-Chair of the BEREC “Digital Markets” working group)
  - Coordination of Data Act implementation within BEREC, close cooperation with the Commission
  - Participation in the European Data Innovation Board, to ensure consistent implementation of the Data Governance Act and the Data Act

Improving and sharing knowledge of the environmental impact of digital technology

A neutral expert working to inform public debate, every year Arcep expands and shares its knowledge of the the environmental impact of ICT



- Publication of **the 5th edition of the Achieving digital sustainability survey (2024 data)** in May 2026
- Publication of the 2nd edition of the **study on the environmental footprint of audiovisual media use,** with Arcom and in cooperation with ADEME, before the end of 2026
- Arcep is a driving force in Europe and internationally, for having widely disseminated knowledge of the environmental impact of ICT
  - **Co-chair of the BEREC "Sustainability" group** since 2020
  - **Chair of the ITU "Sub-group on National Greenhouse Gas Emissions Monitoring Indicators"**

Thank you for your attention

04

Annexes

Arcep publishes data on the electronic communications market and the environmental impact of digital technology

Investment

- Annual publication : Observatory of electronic communications

Operator revenue:

- Quarterly publication: Observatory of electronic communications
- Annual publication: Observatory of electronic communications

Fixed network subscription and deployment:

- Quarterly publication: Broadband and superfast broadband market scorecard

Mobile network subscription and deployment :

- Quarterly publication: Observatory of mobile services
- Quarterly publication: Observatory of 5G deployment

Prices:

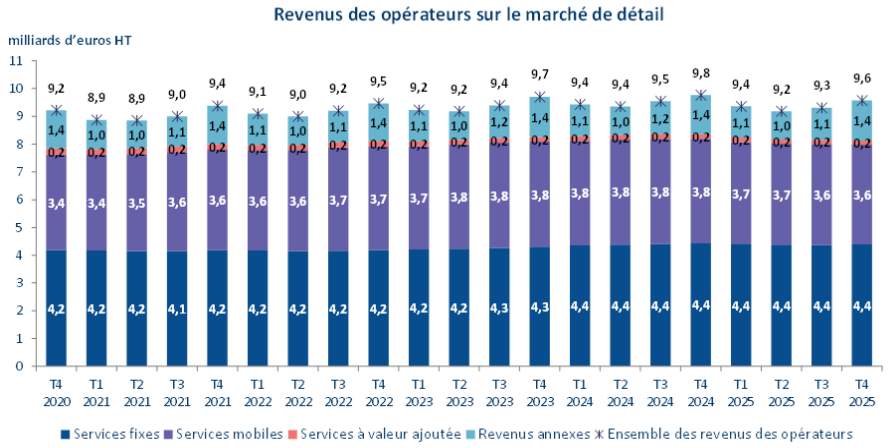
- Annual publication: fixed and mobile service price index

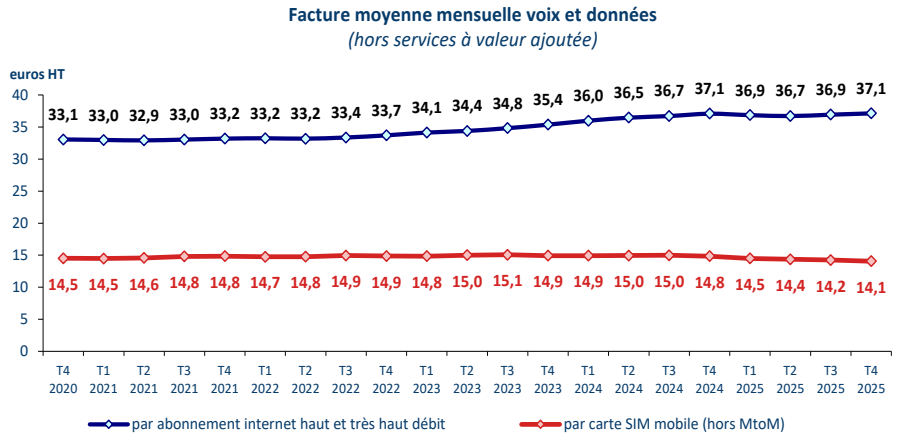
All of the data published are available as open datasets:

- https://www.data.gouv.fr/fr/datasets/observatoire-des-communications-electroniques
- Fixed broadband and superfast broadband market (deployments) - data.gouv.fr

Environmental impact of ICT:

- Annual publication: Annual Achieving digital sustainability survey





Digital infrastructures that are available everywhere, to everyone, and for a long time to come

Arcep's Ambition 2030

In January 2025, Arcep unveiled its "Ambition 2030": A strategy for 2030, set out in nine strategic objectives to equip the country with **digital infrastructures** that are accessible **everywhere**, to **everyone** and for **a long time to come**. A roadmap that provides every stakeholder with clarity on the digital ecosystem.



To view each objective in detail

ELECTRONIC COMMUNICATIONS

1. Finalise the transition to **ultrafast access for** everyone
2. Guarantee connectivity for **businesses** and bolstering market competition
3. Ensure the **quality** and **sustainability** of electronic communications infrastructures and providing expertise on their **resilience**

ENVIRONMENT

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

DIGITAL INFRASTRUCTURES

6. Promote the development of the **data** and **innovation** economies
7. Foster greater freedom of choice for **cloud** services
8. Work to create **open digital markets** and **AI systems**

PRESS DISTRIBUTION

9. Further the modernisation of **press distribution and** highlight **the importance of newsagents**

The situation in in French Overseas territories

MOBILE

5G deployments in French Overseas territories in 2025:

- Deployments began in late 2024 in **Guadeloupe**, **Martinique** and in the first half of 2025 in **Mayotte**. At the end of 2025, around a 100 sites were open commercially in each of these territories.
- 5G deployments continue in **Reunion and in Guiana** in particular (with 600 sites open commercially in Réunion and more than 90 sites in Guiana). Six sites are open in **Saint Martin** and five in **Saint Barthélemy**.

FIXED

Ongoing FttH rollouts in the Overseas territories :

- 75,000 lines deployed in 2025 (versus 90,000 in 2024)
- Average FttH coverage of 85% (+ 6 pts YoY)
- Private and/or public FttH rollout projects launched in every Overseas territory (except Saint Pierre and Miquelon)
- Observed overlap of deployments in Mayotte between Orange and the Mayotte THD PIN

Since September 2025, the tools for monitoring mobile connectivity in the Overseas territories have been updated!

"Turnkey" territorial maps have been enhanced with new elements for monitoring 5G rollouts, with granular graphics and maps for each territory.

