



PRESS RELEASE

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Communication to the Senate Finance Committee

PUBLIC SUPPORT FOR THE ROLL-OUT OF FIBRE OPTICS

As part of the *France Superfast Broadband Plan (Plan France très haut débit - PFTHD)* launched in 2013, the Government announced in 2020 that fibre optics would be rolled out nationwide by 2025. The Senate Finance Committee has referred the matter to the financial authorities for an assessment of the roll-out, particularly in terms of public support, effective access to the network and the link with the closure of the copper network. As a result, fibre optics will soon become the benchmark fixed telecommunications infrastructure in France. Despite regional disparities, the roll-out of fibre seems rapidly achievable in most areas. On the other hand, connections are slowing down in some major conurbations where, at this stage, the regulator has no binding powers. In addition, the funding model for public-initiative networks needs to be updated to ensure its sustainability. Finally, service quality for users and the resilience of fibre optic networks must become new priorities, calling for greater mobilisation of public players.

Rapid roll-out of fibre optics, essential before the closure of the copper network

In the very densely populated areas that cover the main conurbations (18% of connectable premises), the roll-out of fibre optics, which is profitable for private telecoms operators, is carried out by them using their own funds, without any public intervention. For the rest of France, the *France Superfast Broadband Plan (Plan France très haut débit- PFTHD)* has defined several categories of roll-out zones. In AMII areas (38% of connectable premises) where calls for expressions of intention to invest have been defined, private infrastructure operators are making binding commitments to the State, under the supervision of Arcep, France's Regulatory Authority for Electronic Communications, Postal Affairs and Press Distribution. In so-called "local commitment areas" (around 5% of connectable premises), these same operators make commitments to the local authorities concerned, under the supervision of the regulator. Lastly, in other areas that are not profitable for private operators, local authorities entrust the construction of the fibre infrastructure, usually through delegated management, to public initiative networks (39% of connectable premises). With fibre optic coverage reaching 90% in just over 10 years, the PFTHD has been a success in terms of rolling out the fibre optics network. By the end of the third quarter of 2024, 39.9 million of the 44.5 million premises surveyed by operators in France could be connected to fibre, an increase of almost 8% in one year, and 4.6 million still needed to be connected. Between 2010 and 2024, the public authorities have mobilised almost €12.7 billion, including €8.7 billion from local authorities, €3.5 billion from the State and €0.5 billion from the European Union. However, in the third quarter of 2024, fibre roll-out was more advanced in areas where operators were rolling out networks using their own funds than in public-initiative networks, but the pace was slowing in the densest conurbations. It seems essential to mobilise all the players, both public and private, at a time when the copper network is due to be shut down by 2030. Greater control by Arcep, which has powers of investigation and sanction, therefore seems necessary. New binding commitments could be

envisaged in densely populated areas to achieve the objective of widespread fibre roll-out, without excluding the occasional use of alternative technologies.

A public zone financing model whose viability needs to be assessed

The total public and private investment in the construction of fibre optics networks amounts to more than €22 billion for RIPs alone, including €9.4 billion from private operators. Based on Arcep's pricing guidelines established in 2015, the business plans of the public networks are no longer always in line with the reality of their costs. As a result, local authorities need to take greater account of the issue of the economic equilibrium of their network in their projects, and obtain support from the National Agency for Territorial Cohesion (ANCT) in updating their economic model. In this respect, Arcep is working with the main infrastructure operators to objectivise costs, and it would appear necessary to bring this work to a swift conclusion.

Service quality and network resilience: new priorities and actions to be strengthened

Although fibre optics networks are set to become the benchmark infrastructure for fixed telecommunications, their service quality varies from one region to another. Localised networks, representing 2% of lines in France, cause serious inconvenience for users. Recovery plans have been launched, under the guidance of Arcep; however, they are late in coming and their effects are taking a long time to produce real improvements, despite recent progress. At the request of operators, the regulator has authorised the subcontracting of the final connection to a commercial operator ("STOC" mode) in order to speed up fibre roll-out. However, the industry has underestimated the need for skilled labour and controls: the use of poorly managed and poorly controlled subcontracting has led to defects and failures that Arcep needs to assess more accurately by developing indicators to measure the quality of final connections. In addition, STOC mode regulation, which is based on the infrastructure operator's ability to control the commercial operators on its network, is ineffective because there are no tools to identify the perpetrator of the damage. Arcep should make greater use of penalties to ensure the quality of final connections subcontracted to commercial operators. Network resilience must also be a priority, in particular to anticipate the effects of increasingly intense weather events. Under the aegis of the General Secretariat for Defence and National Security (SGDSN), work involving the State and local authorities, the regulator, public stakeholders and operators should lead to the definition of a national strategy for the resilience of fibre optics networks. At the local level, the State should ensure that network stakeholders are integrated into local crisis preparation and management organisations, by encouraging them to draw up a diagnosis and action plan on their vulnerabilities.

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