

MOBILE MARKET

4TH QUARTER 2018

TELECOMMUNICATIONS OBSERVATORY

07 February 2018

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The quarterly figures relating to the sales turnover and traffic are published three months after the end of the quarter within the [telecommunications observatory in France](#). Except opposite mention, indicators are in millions of units.

A - Mobiles services market - MtoM SIM cards excluded

I. NATIONAL REPORT - total customers and active customers

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	74,596	74,960	74,943	75,475	75,597
- Quarterly Net Adds	0,397	0,363	-0,017	0,532	0,122
- Year on year net growth (in %)	2,2%	2,6%	2,0%	1,7%	1,3%

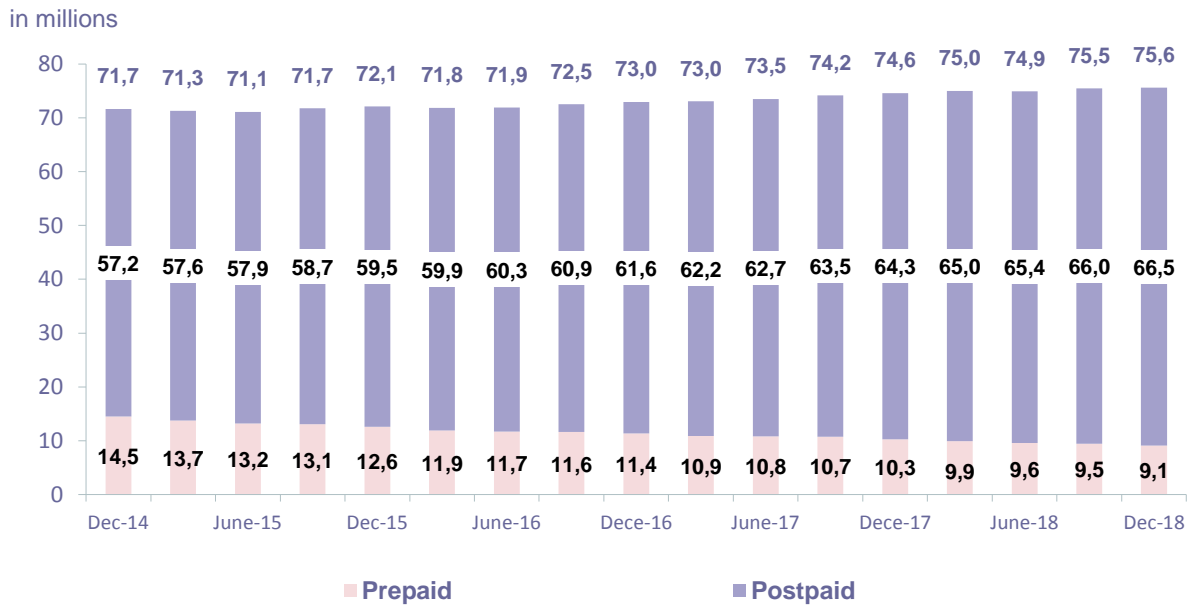
Penetration Rate	111,8%	111,9%	111,8%	112,6%	112,8%
<i>Population at January the 1st of previous year (source: Insee)</i>	66,744	67,004			

Postpaid customers	64,336	65,025	65,385	65,999	66,507
- Quarterly Net Adds	0,862	0,689	0,360	0,614	0,508
- Year on year net growth (in %)	4,5%	4,6%	4,3%	4,0%	3,4%

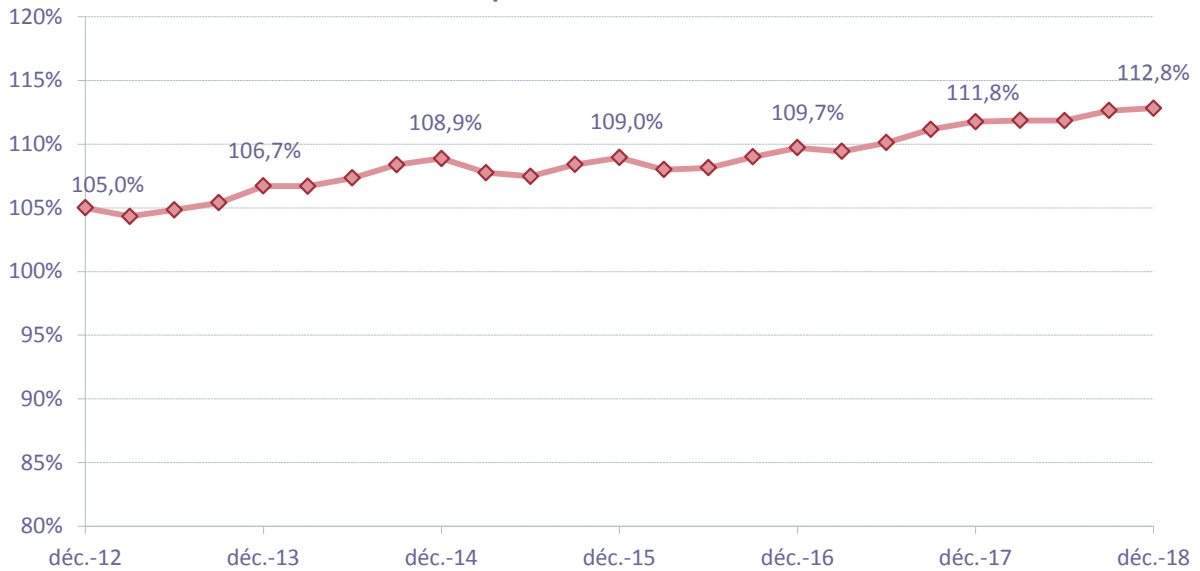
Prepaid customers	10,261	9,935	9,558	9,477	9,090
- Quarterly Net Adds	-0,465	-0,326	-0,376	-0,082	-0,386
- Year on year net growth (in %)	-9,8%	-8,7%	-11,7%	-11,6%	-11,4%

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total active customers	72,060	72,573	72,605	73,055	73,452
- as a % of total customers	96,6%	96,8%	96,9%	96,8%	97,2%
- Quarterly Net Adds	0,352	0,513	0,032	0,450	0,396
- Year on year net growth (in %)	2,0%	2,9%	2,4%	1,9%	1,9%
Adjusted figure					

Number of national SIM cards (MtoM cards excluded)



Mobile penetration rate in France



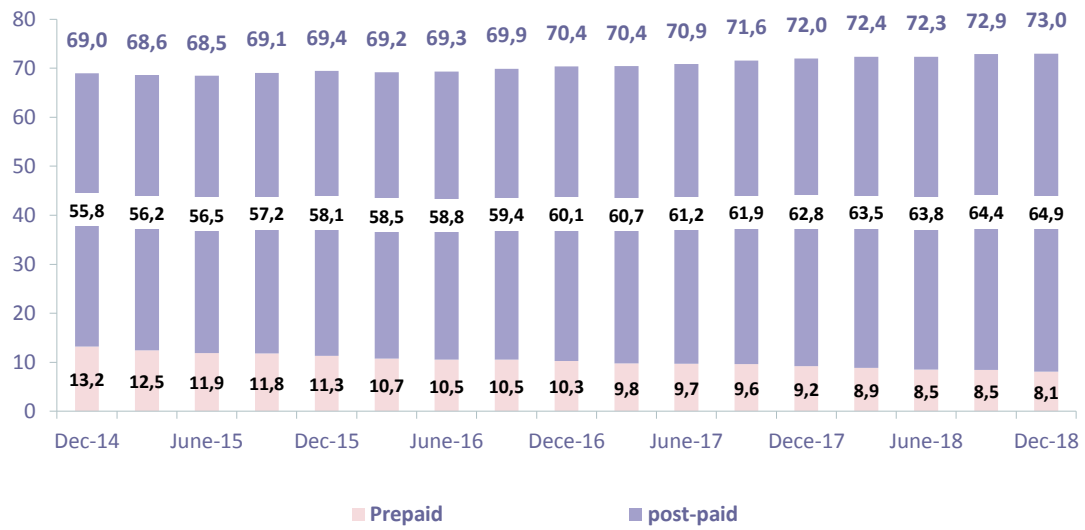
II. METROPOLITAN REPORT

II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	71,989	72,353	72,342	72,876	72,983
among which Internet SIM cards	3,424	3,465	3,459	3,432	3,369
- Quarterly Net Adds	0,398	0,363	-0,010	0,534	0,107
- Year on year net growth (in %)	2,3%	2,7%	2,1%	1,8%	1,4%
Penetration Rate	111,5%	111,7%	111,6%	112,5%	112,6%
<i>Population at January the 1st of previous year (source: Insee)</i>	64,558	64,801			
Postpaid customers	62,781	63,455	63,801	64,400	64,884
among which Internet SIM cards	2,745	2,838	2,855	2,879	2,875
- Quarterly gross sales	4,389	3,953	3,384	3,683	3,442
- Quarterly Net Adds	0,836	0,674	0,347	0,598	0,485
- Year on year net growth (in %)	4,5%	4,6%	4,3%	4,0%	3,4%
Prepaid customers	9,209	8,898	8,541	8,477	8,099
among which Internet SIM cards	0,679	0,628	0,604	0,553	0,495
- Quarterly gross sales	2,100	1,958	1,964	2,147	2,010
- Quarterly Net Adds	-0,438	-0,311	-0,357	-0,065	-0,378
- Year on year net growth (in %)	-10,4%	-8,9%	-12,1%	-12,1%	-12,1%
Total active customers	69,695	70,209	70,256	70,719	71,103
- as a % of total customers	96,8%	97,0%	97,1%	97,0%	97,4%
- Quarterly Net Adds	0,315	0,514	0,047	0,464	0,384
- Year on year net growth (in %)	2,1%	3,0%	2,4%	1,9%	2,0%
Adjusted figure					

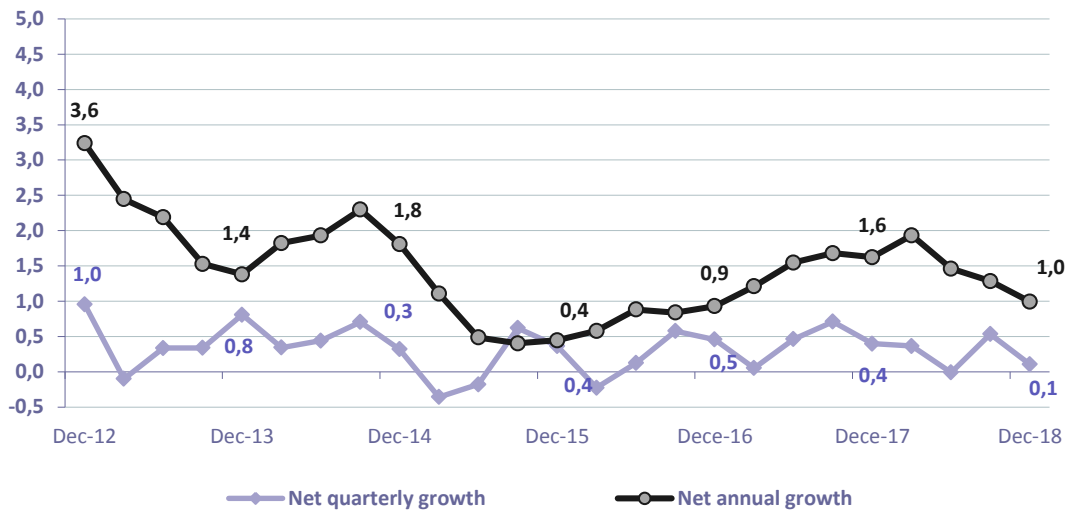
Number of metropolitan SIM cards

in millions



Net quarterly and annual growths of the total metropolitan customers (MtoM cards excluded)

in millions



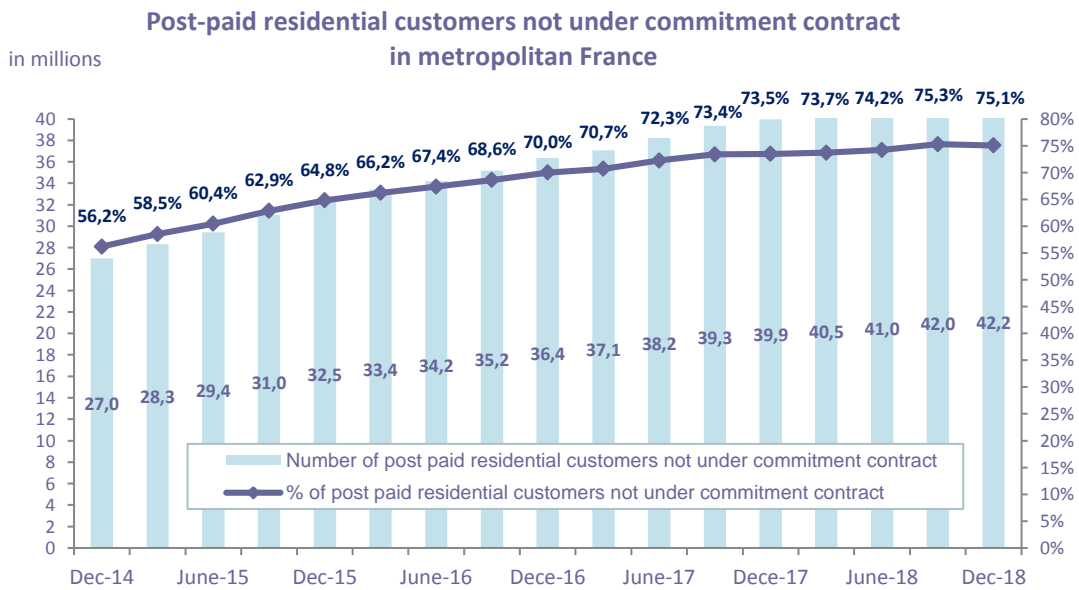
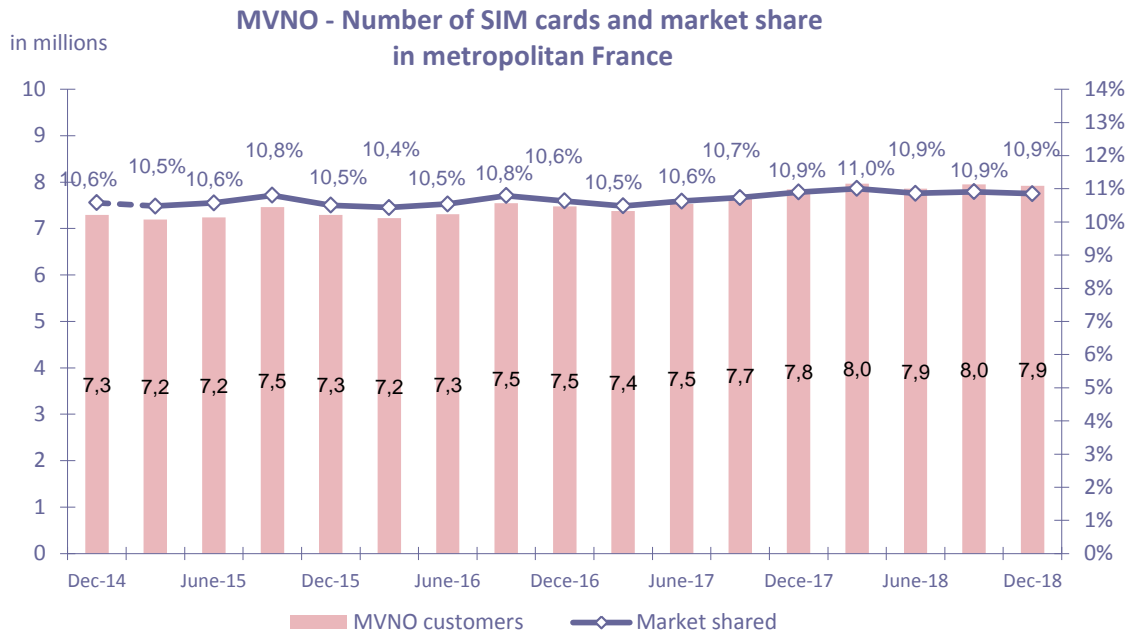
II.2 Virtual mobile network operators (MVNO) market share



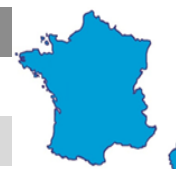
	Dece-17	March-18	June-18	Sept-18	Dec-18
Mobile networks operators (MNOs) customers	64,142	64,388	64,484	64,926	65,063
- Among which postpaid customers	59,100	59,661	59,951	60,521	60,886
- Quarterly Net Adds	0,236	0,245	0,096	0,442	0,137
- Year on year net growth (in %)	2,0%	2,1%	1,8%	1,6%	1,4%
MVNOs customers	7,847	7,965	7,859	7,951	7,921
	3,681	3,793	3,850	3,878	3,999
- Quarterly Net Adds	0,162	0,118	-0,106	0,092	-0,030
- Year on year net growth (in %)	4,9%	7,9%	4,3%	3,5%	0,9%
MVNO Market share	10,9%	11,0%	10,9%	10,9%	10,9%
MVNO Market share of gross postpaid sales	7,0%	8,4%	8,2%	7,4%	10,7%
MVNO Market share of gross prepaid sales	63,0%	64,2%	64,4%	62,3%	65,7%

II.3 Market fluidity

	Dece-17	March-18	June-18	Sept-18	Dec-18
Quarterly postpaid cancellation rate	5,7%	5,2%	4,8%	4,8%	4,6%
Quarterly prepaid cancellation rate	26,9%	25,0%	26,5%	26,0%	28,8%
Numbers ported during the quarter	2,453	2,137	2,065	2,108	1,805
- Year on year net growth (in %)	5,8%	36,8%	14,8%	19,4%	-26,4%
Post-paid residential customers not under commitment	39,948	40,516	41,013	41,994	42,184
- % of customers not under commitment contract	73,5%	73,7%	74,2%	75,3%	75,1%
Post-paid customers not under commitment contract	43,164	43,765	44,429	45,480	45,837
- % of customers not under commitment contract	68,8%	69,0%	69,6%	70,6%	70,6%
Adjusted figure					



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET



III.1 Residential market - Total customers segmentation

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total residential customers	63,577	63,878	63,802	64,268	64,294
- Quarterly Net Adds	2,184	2,223	2,205	2,177	2,101
- Quarterly Net Adds	0,317	0,301	-0,076	0,466	0,026
- Year on year net growth (in %)	2,2%	2,7%	1,9%	1,6%	1,1%

Postpaid residential customers	54,369	54,981	55,261	55,791	56,195
- Quarterly gross sales	3,948	3,557	3,026	3,341	3,047
- Quarterly Net Adds	0,755	0,612	0,280	0,530	0,404
- Year on year net growth (in %)	4,7%	4,8%	4,4%	4,1%	3,4%

Prepaid residential customers	9,209	8,898	8,541	8,477	8,099
- Quarterly gross sales	2,100	1,958	1,964	2,147	2,010
- Quarterly Net Adds	-0,438	-0,311	-0,357	-0,065	-0,378
- Year on year net growth (in %)	-10,4%	-8,9%	-12,1%	-12,1%	-12,1%

III.2 Residential market - Mobile Virtual Network Operators market share

	Dece-17	March-18	June-18	Sept-18	Dec-18
MNOs	56,037	56,225	56,260	56,634	56,689
- Quarterly Net Adds	0,164	0,188	0,035	0,375	0,055
- Year on year net growth (in %)	1,9%	2,0%	1,6%	1,4%	1,2%

MVNOs	7,540	7,654	7,543	7,633	7,605
- Quarterly Net Adds	0,153	0,113	-0,111	0,091	-0,029
- Year on year net growth (in %)	4,6%	7,8%	4,1%	3,3%	0,9%

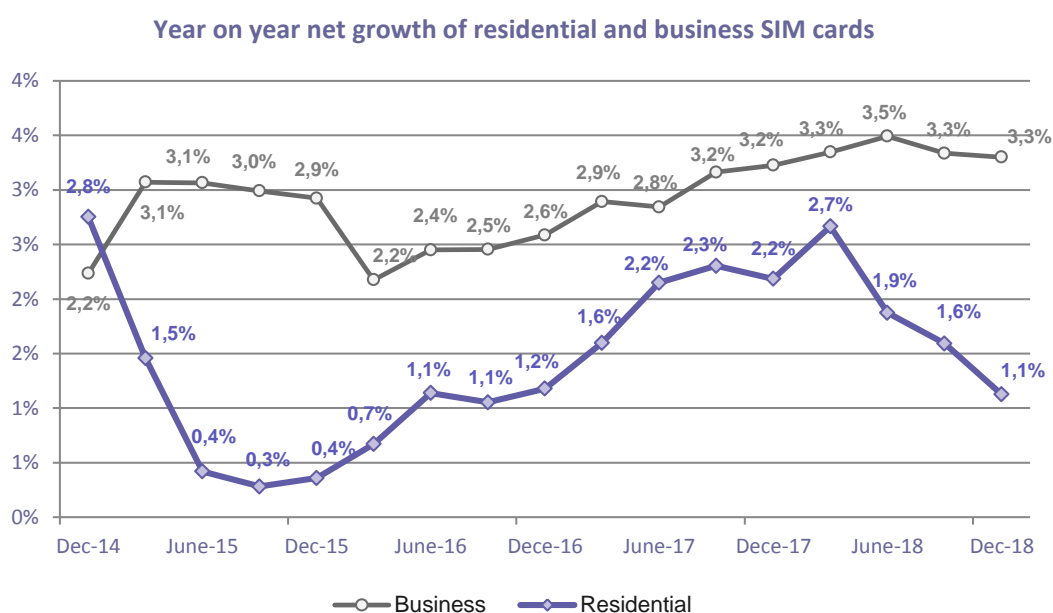
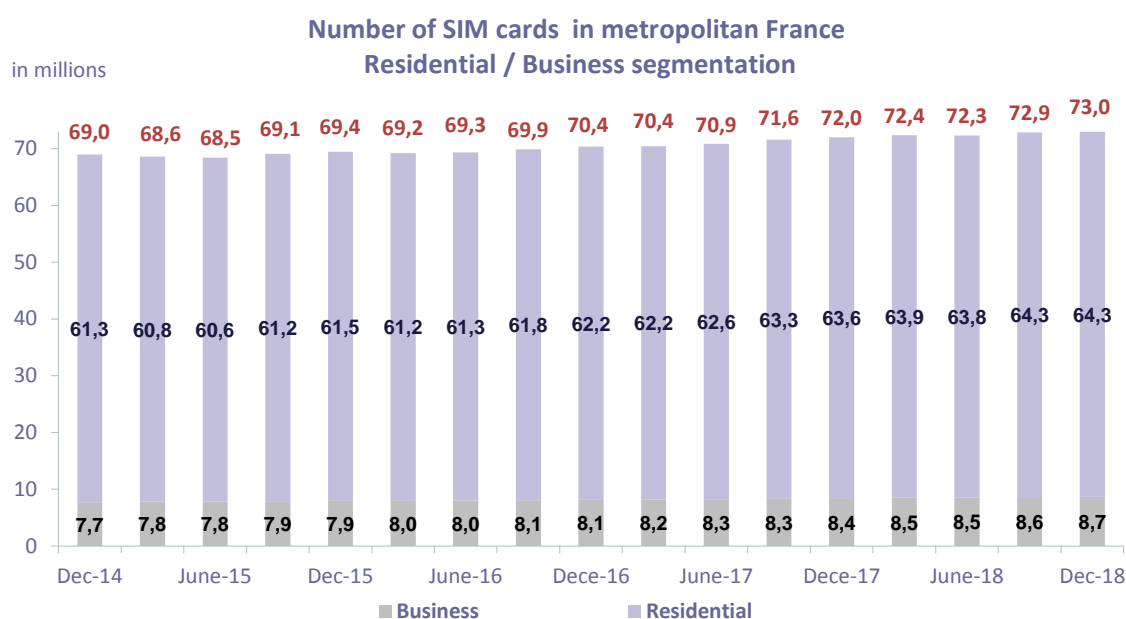
MVNO Market share	11,9%	12,0%	11,8%	11,9%	11,8%
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MVNO Market share of gross postpaid sales	7,3%	8,8%	8,7%	7,9%	11,6%
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III.3 Business market - total customers MtoM SIM cards excluded

Dece-17	March-18	June-18	Sept-18	Dec-18
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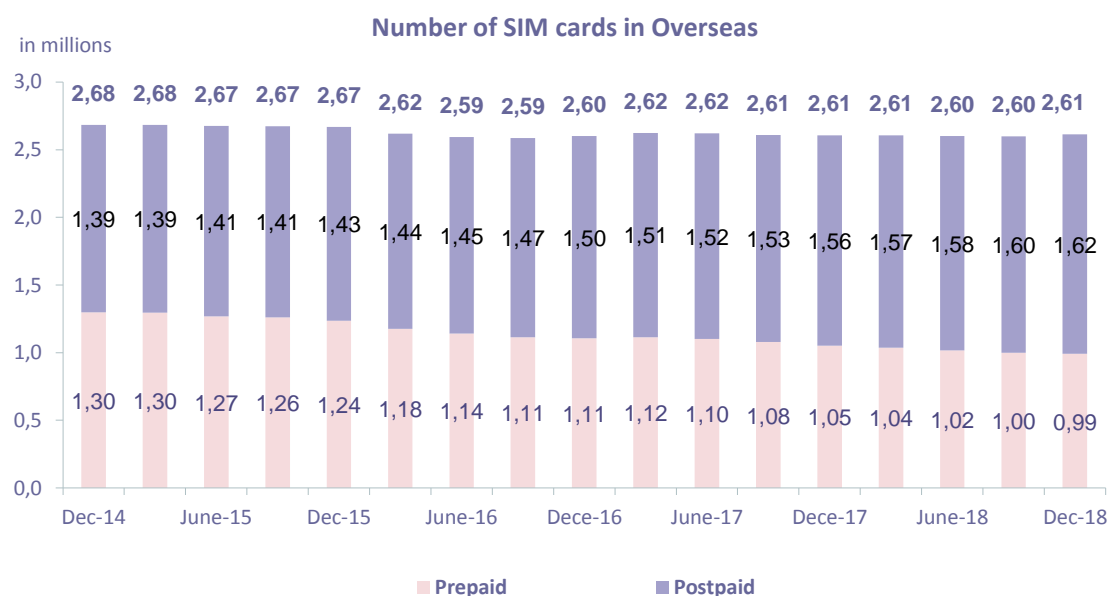
Postpaid business customers	8,412	8,474	8,540	8,608	8,690
among which Internet SIM cards	1,240	1,242	1,254	1,255	1,268
- Quarterly Net Adds	0,081	0,062	0,066	0,068	0,081
- Year on year net growth (in %)	3,2%	3,3%	3,5%	3,3%	3,3%
Adjusted figure					



IV. OVERSEAS REPORT : DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

IV.1 Overseas departments: total customers and total active customers segmentation

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	2,607	2,607	2,600	2,599	2,614
- Quarterly Net Adds	-0,001	0,000	-0,007	-0,001	0,014
- Year on year net growth (in %)	0,2%	-0,7%	-0,8%	-0,3%	0,3%
Penetration Rate	119,3%	118,3%	118,0%	118,0%	118,6%
<i>Population at January the 1st of previous year (source: Insee)</i>	2,186	2,203			
Postpaid customers	1,555	1,570	1,583	1,599	1,622
- Quarterly Net Adds	0,026	0,015	0,013	0,016	0,023
- Year on year net growth (in %)	4,0%	4,0%	4,2%	4,6%	4,3%
Prepaid customers	1,052	1,037	1,017	1,000	0,991
- Quarterly Net Adds	-0,027	-0,015	-0,020	-0,017	-0,009
- Year on year net growth (in %)	-4,9%	-7,0%	-7,7%	-7,3%	-5,8%
Total active customers	2,365	2,364	2,349	2,336	2,348
- as a % of total customers	90,7%	90,7%	90,3%	89,9%	89,9%
- Quarterly Net Adds	0,036	0,000	-0,015	-0,013	0,012
- Year on year net growth (in %)	0,0%	0,1%	-0,2%	0,3%	-0,7%
Adjusted figure					



IV.2 Guadeloupe, St-Martin, St-Barth. total customers and active customers segm.



	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	0,625	0,630	0,622	0,619	0,618
- Quarterly Net Adds	-0,007	0,005	-0,009	-0,002	-0,001
- Year on year net growth (in %)	-1,4%	-1,6%	-1,8%	-2,0%	-1,2%
Penetration Rate	142,3%	143,9%	141,9%	141,3%	141,1%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,440	0,438			
Postpaid customers	0,349	0,352	0,354	0,355	0,359
- Quarterly Net Adds	0,004	0,004	0,002	0,001	0,004
- Year on year net growth (in %)	3,2%	3,4%	3,3%	3,1%	2,9%
Prepaid customers	0,277	0,278	0,267	0,264	0,259
- Quarterly Net Adds	-0,011	0,001	-0,011	-0,003	-0,005
- Year on year net growth (in %)	-6,6%	-7,3%	-7,9%	-8,2%	-6,3%
Total active customers	0,559	0,558	0,547	0,535	0,537
- as a % of total customers	89,4%	88,4%	88,0%	86,4%	86,9%
- Quarterly Net Adds	0,001	-0,001	-0,011	-0,012	0,002
- Year on year net growth (in %)	-1,0%	-2,9%	-3,7%	-4,0%	-3,9%
Adjusted figure					

IV.3 Guyane: total customers and total active customers segmentation



	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	0,296	0,294	0,297	0,295	0,297
- Quarterly Net Adds	-0,003	-0,002	0,004	-0,002	0,002
- Year on year net growth (in %)	1,2%	-1,2%	-0,8%	-1,2%	0,5%
Penetration Rate	110,8%	107,1%	108,4%	107,6%	108,4%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,267	0,274			
Postpaid customers	0,122	0,124	0,125	0,125	0,128
- Quarterly Net Adds	0,003	0,001	0,001	0,000	0,003
- Year on year net growth (in %)	3,6%	3,9%	4,8%	4,6%	4,9%
Prepaid customers	0,173	0,170	0,172	0,170	0,169
- Quarterly Net Adds	-0,006	-0,003	0,002	-0,003	-0,001
- Year on year net growth (in %)	-0,4%	-4,6%	-4,5%	-5,1%	-2,7%
Total active customers	0,260	0,259	0,260	0,258	0,261
- as a % of total customers	87,9%	88,4%	87,6%	87,5%	87,7%
- Quarterly Net Adds	-0,002	-0,001	0,001	-0,002	0,003
- Year on year net growth (in %)	-2,4%	-0,5%	-0,5%	-1,6%	0,2%

IV.4 Martinique: total customers and total active customers segmentation

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	0,525	0,527	0,527	0,527	0,530
- Quarterly Net Adds	-0,004	0,002	0,000	0,000	0,003
- Year on year net growth (in %)	-2,1%	-2,3%	-1,2%	-0,4%	0,9%
Penetration Rate	138,8%	140,6%	140,6%	140,5%	141,3%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,378	0,375			
Postpaid customers	0,322	0,324	0,326	0,326	0,329
- Quarterly Net Adds	0,003	0,002	0,001	0,000	0,003
- Year on year net growth (in %)	2,3%	2,4%	2,4%	2,0%	2,0%
Prepaid customers	0,202	0,203	0,201	0,201	0,201
- Quarterly Net Adds	-0,007	0,000	-0,001	0,000	0,000
- Year on year net growth (in %)	-8,5%	-9,0%	-6,5%	-4,2%	-0,8%
Total active customers	0,460	0,459	0,453	0,445	0,445
- as a % of total customers	87,8%	87,1%	85,9%	84,5%	84,1%
- Quarterly Net Adds	0,003	-0,001	-0,006	-0,008	0,000
- Year on year net growth (in %)	-2,2%	-1,1%	-1,7%	-2,8%	-3,3%

IV.5 Mayotte: total customers and total active customers segmentation

	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	0,281	0,280	0,281	0,283	0,290
- Quarterly Net Adds	0,005	-0,002	0,001	0,002	0,007
- Year on year net growth (in %)	8,9%	4,6%	1,4%	2,2%	3,0%
Penetration Rate	117,5%	112,2%	112,6%	113,5%	116,3%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,240	0,249			
Postpaid customers	0,065	0,066	0,065	0,065	0,066
- Quarterly Net Adds	-0,001	0,001	0,000	0,000	0,000
- Year on year net growth (in %)	3,1%	1,7%	0,1%	-0,8%	0,8%
Prepaid customers	0,216	0,214	0,215	0,218	0,224
- Quarterly Net Adds	0,005	-0,002	0,001	0,002	0,007
- Year on year net growth (in %)	10,8%	5,6%	1,7%	3,1%	3,7%
Total active customers	0,236	0,241	0,241	0,242	0,243
- as a % of total customers	83,8%	86,4%	85,8%	85,6%	83,8%
- Quarterly Net Adds	0,012	0,006	-0,001	0,001	0,001
- Year on year net growth (in %)	6,4%	6,9%	4,9%	8,2%	3,0%

IV. 6 Réunion: total customers and total active customers segmentation



	Dece-17	March-18	June-18	Sept-18	Dec-18
Total customers	0,875	0,871	0,869	0,870	0,874
- Quarterly Net Adds	0,009	-0,003	-0,003	0,001	0,004
- Year on year net growth (in %)	-0,3%	-0,5%	-0,5%	0,5%	-0,1%
Penetration Rate	102,2%	101,2%	100,9%	101,1%	101,5%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,856	0,861			
Postpaid customers	0,692	0,700	0,709	0,723	0,736
- Quarterly Net Adds	0,017	0,008	0,009	0,014	0,013
- Year on year net growth (in %)	5,0%	5,2%	5,7%	7,1%	6,3%
Prepaid customers	0,183	0,172	0,160	0,147	0,138
- Quarterly Net Adds	-0,008	-0,011	-0,011	-0,013	-0,009
- Year on year net growth (in %)	-16,3%	-18,4%	-21,0%	-22,9%	-24,5%
Total active customers	0,845	0,842	0,843	0,851	0,857
- as a % of total customers	96,6%	96,6%	97,1%	97,8%	98,1%
- Quarterly Net Adds	0,023	-0,003	0,002	0,007	0,006
- Year on year net growth (in %)	1,0%	1,1%	1,7%	3,5%	1,5%

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

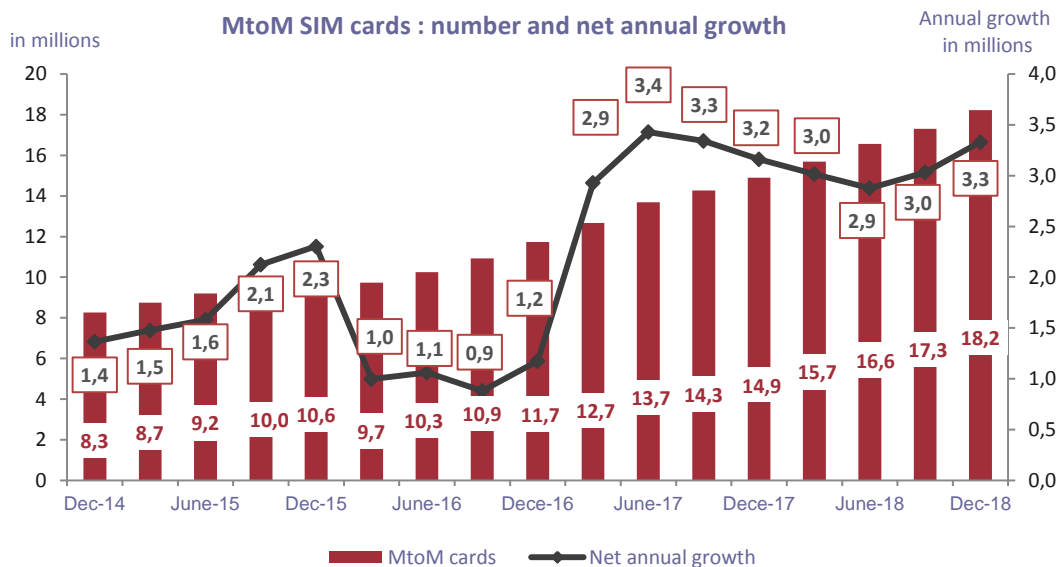
	Dece-17	March-18	June-18	Sept-18	Dec-18
MtoM SIM cards	14,899	15,685	16,561	17,305	18,230
-Gross sales for the quarter	0,738	0,918	1,012	0,899	1,086
- Quarterly Net Adds	0,626	0,786	0,876	0,743	0,925
- Year on year net growth (in %)	26,9%	23,8%	21,0%	21,2%	22,4%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	Dece-17	March-18	June-18	Sept-18	Dec-18
MtoM SIM cards	14,873	15,659	16,535	17,279	18,203
- Quarterly Net Adds	0,626	0,786	0,876	0,743	0,924
- Year on year net growth (in %)	27,0%	23,9%	21,1%	21,3%	22,4%

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	Dece-17	March-18	June-18	Sept-18	Dec-18
MtoM SIM cards	0,025	0,026	0,026	0,026	0,027
- Quarterly Net Adds	0,000	0,000	0,000	0,000	0,001
- Year on year net growth (in %)	-0,7%	1,0%	3,2%	3,0%	5,4%
Adjusted figure					



Appendix: DEFINITIONS

Total SIM cards: Total SIM cards registered with an operator's Home Location Register (HLR) or in the Home Subscriber Server (HSS) at the date in question. So, for business clients, each line is considered as a post-paid contract. Post-paid cards are those whose service is invoiced regularly (packages, metered offers, blocked accounts, etc.). By default, any non-post-paying client is considered to be a pre-paying client.

Internet SIM cards: number of SIM cards sold by mobile operators (flat rates or prepaid cards), to be used solely for accessing the Internet (PCMCIA cards, 3G/4G USB keys). These cards cannot be used to make voice calls.

Gross sales: total SIM cards at the end of the quarter which are registered with the HLR/HSS during the quarter. They exclude migrations: pre-paid to post-paid migration corresponds to clients asking their operator to replace their pre-paid offer in force at the beginning of the quarter with a post-paid offer; conversely, post-paid to pre-paid migration corresponds to clients asking their operator to replace their post-paid offer in force at the beginning of the quarter with a pre-paid offer.

Cancellation: Total SIM cards at the beginning of the quarter whose registration in the HLR/HSS was deleted during the quarter. Modifications to the registration in the HLR/HSS are not cancellations. So, this definition does not cover changes in offers within a line, or pre- to post-paid migrations or post- to pre-paid migrations, or service suspensions.

Penetration rate: Penetration rate: it is obtained by dividing the total number of clients by the population. The reference population is 1st January of the year N-1 published by Insee on the 1st January of the year N. The reference population in 2018, comes from estimates published in January 2018 (and therefore of the population for January 1st, 2017).

Customers not under commitment contract: a client under a commitment contract is any client having taken out or renewed a contract (out of all or part of the contracts related to mobile service) for a minimum period not having expired at the date in question. A client not under commitment contract is any client not having a contract.

Total active customers: the number of active clients equals to all post-paid customers under contract and pre-paid customers under contract having made or received a telephone call, whether free or paid, sent a SMS, MMS used a multimedia (e-mail, internet) service during the past three months (not including incoming SMS).

Number of ported numbers : is calculated as half of the volume of numbers of "in" porting and "out" porting done by all operators. "In" porting is considered to be an effective porting from the receiving operator's point of view. "Out" porting is an effective porting from the donor operator's point of view.

Total MtoM cards: number of SIM cards used for communication between remote equipment (remote management of equipment, terminals and servers, fixed or mobile). The communications from these cards are generally carried out without human intervention. These cards are used for example for tracking of objects and tools (fleets of vehicles, machinery, etc.), for purposes of updating of data (surveys at distance of meters, sensors...), for the identification and monitoring of all kinds (alarms, remote actions...), the list of those uses where communication is from "machine to machine" is not limited. Are taken into account the MtoM SIM cards, the communication was done only in downstream, only upstream or both. The cards used for interpersonal communication and exclusive internet cards are not included here.

Operators

- Metropolitan mobile network operators: Bouygues Telecom, Free mobile, Orange, Société Française du Radiotéléphone (SFR).
- Overseas mobile network operators : Dauphin Telecom, Digicel AFG, Globaltel, Orange Caraïbes, Orange Réunion, Outremer Telecom, SAS SPM, Société Réunionnaise du Radiotéléphone (SRR), Telco OI, UTS Caraïbe.
- Mobile Virtual Network Operators independent of mobile network operators active on the quarter.