



autorité de régulation
des communications électroniques,
des postes et de la distribution de la presse

RÉPUBLIQUE FRANÇAISE

MOBILE SERVICES

3RD QUARTER 2019

ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

7th November 2019

ISSN n°2258-3106

SUMMARY

A. Mobiles services market	3
I. National report – Total customer and active customer (MtoM excluded)	3
II. Metropolitan report	5
II.1 Total customers and total actives customers segmentation	5
II.2 MVNO market share	7
II.3 Market fluidity	7
III. Metropolitan residential and business market segmentation	9
III.1 Residential market – total customers segmentation	9
III.2 Residential market – MVNO market share	9
III.3 Business market - total customers segmentation	10
IV. Overseas report	11
IV.1 Total customers and total active customers segmentation	11
IV.2 Guadeloupe: total customers and total active customers segmentation	12
IV.3 Guyane: total customers and total active customers segmentation	12
IV.4 Martinique: total customers and total active customers segmentation	13
IV.5 Mayotte: total customers and total active customers segmentation	13
IV.6 Réunion: total customers and total active customers segmentation	14
B. Internet of things: MtoM SIM cards	15
I. MtoM cards of French operators	15
I.1 MtoM cards of French operators in metropolitan France	15
I.2 MtoM cards of French operators in overseas departments	15
Appendix: Definitions	16

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.

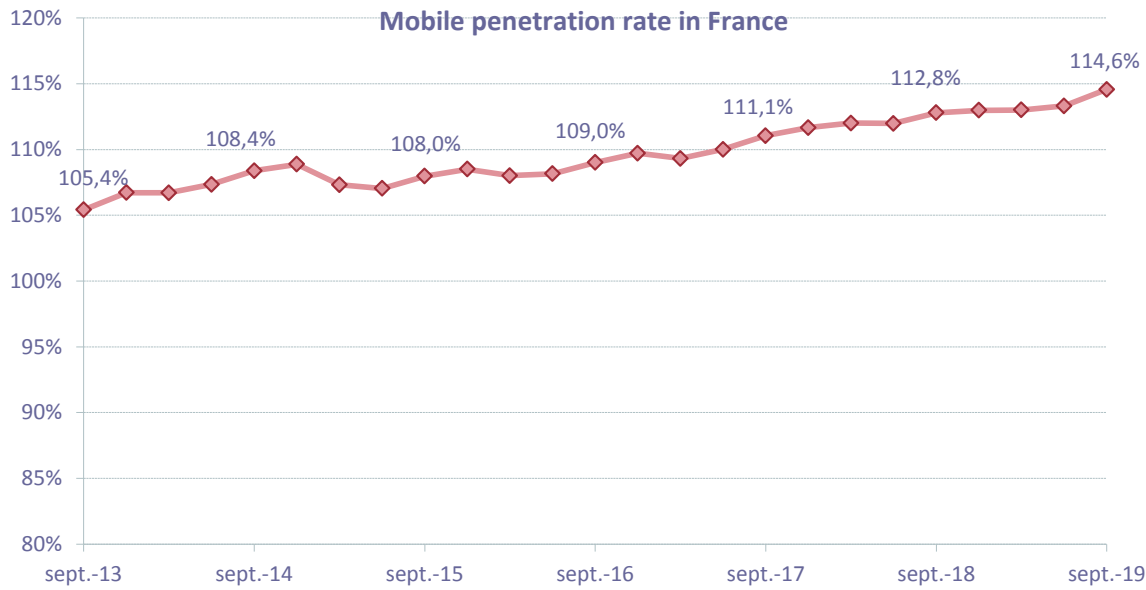
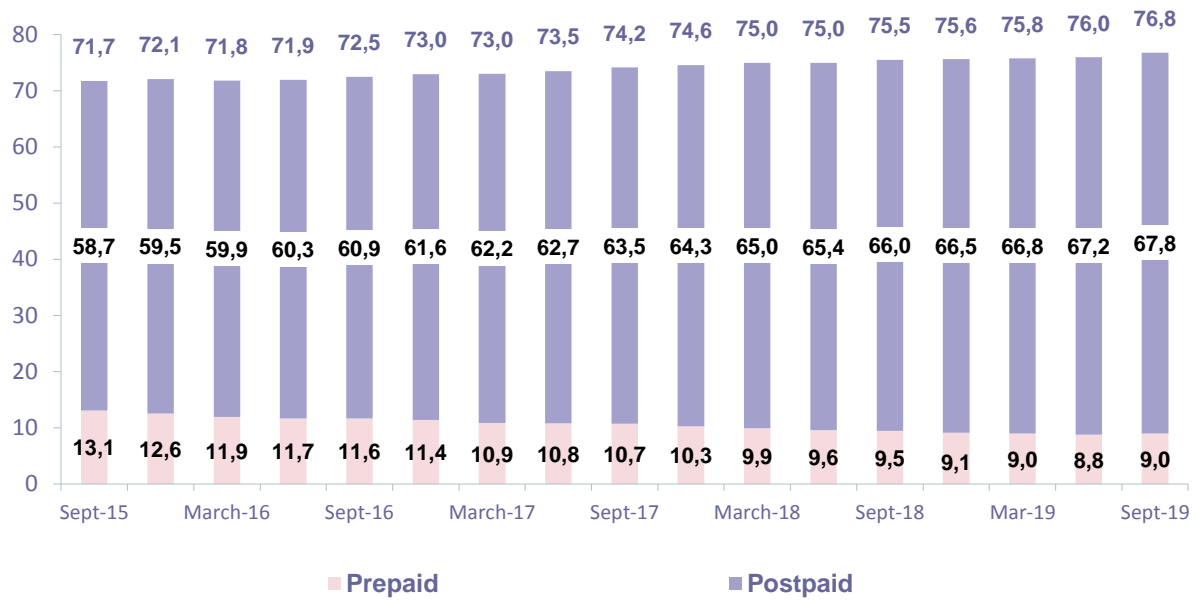
A - Mobiles services market - MtoM SIM cards excluded

I. NATIONAL REPORT - total customers and active customers

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	75,503	75,630	75,762	75,966	76,805
- Quarterly Net Adds	0,543	0,126	0,133	0,204	0,839
- Year on year net growth (in %)	1,8%	1,4%	1,1%	1,3%	1,7%
Penetration Rate	112,8%	113,0%	113,0%	113,3%	114,6%
<i>Population at January the 1st of previous year (source: Insee)</i>	66,941		67,045		
Postpaid customers	66,027	66,538	66,808	67,196	67,833
- Quarterly Net Adds	0,622	0,511	0,271	0,388	0,637
- Year on year net growth (in %)	4,0%	3,4%	2,7%	2,7%	2,7%
Prepaid customers	9,475	9,092	8,954	8,770	8,971
- Quarterly Net Adds	-0,081	-0,383	-0,138	-0,184	0,201
- Year on year net growth (in %)	-11,6%	-11,4%	-9,9%	-8,2%	-5,3%
	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total active customers	73,082	73,484	73,568	74,019	74,753
- as a % of total customers	96,8%	97,2%	97,1%	97,4%	97,3%
- Quarterly Net Adds	0,460	0,402	0,084	0,451	0,734
- Year on year net growth (in %)	1,9%	2,0%	1,3%	1,9%	2,3%

Number of national SIM cards (MtoM cards excluded)

in millions



II. METROPOLITAN REPORT

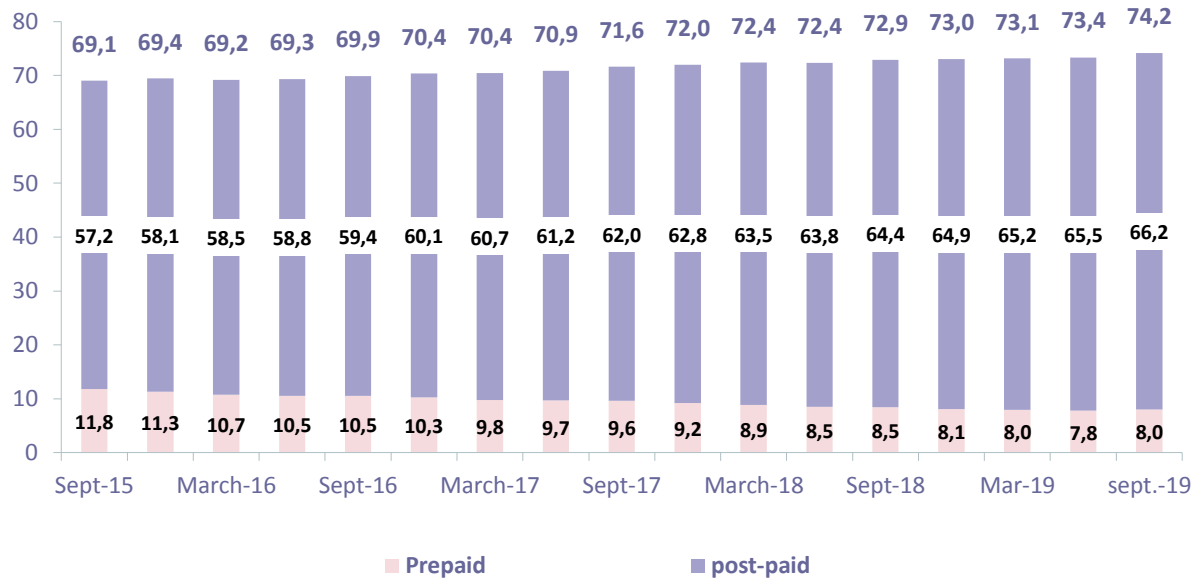
II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)



	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	72,912	73,022	73,145	73,351	74,191
among which Internet SIM cards	3,432	3,369	3,281	3,290	3,296
- Quarterly Net Adds	0,545	0,110	0,123	0,206	0,840
- Year on year net growth (in %)	1,8%	1,4%	1,1%	1,4%	1,8%
Penetration Rate	112,6%	112,8%	112,9%	113,2%	114,5%
<i>Population at January the 1st of previous year (source: Insee)</i>	64,725		64,812		
Postpaid customers	64,435	64,923	65,175	65,546	66,159
among which Internet SIM cards	2,879	2,875	2,842	2,852	2,850
- Quarterly gross sales	3,683	3,442	2,989	2,781	3,160
- Quarterly Net Adds	0,607	0,488	0,252	0,370	0,614
- Year on year net growth (in %)	4,0%	3,4%	2,7%	2,7%	2,7%
Prepaid customers	8,475	8,099	7,970	7,805	8,031
among which Internet SIM cards	0,553	0,495	0,439	0,438	0,447
- Quarterly gross sales	2,147	2,010	1,754	2,091	2,379
- Quarterly Net Adds	-0,064	-0,376	-0,129	-0,165	0,226
- Year on year net growth (in %)	-12,1%	-12,0%	-10,4%	-8,6%	-5,2%
Total active customers	70,755	71,142	71,222	71,672	72,401
- as a % of total customers	97,0%	97,4%	97,4%	97,7%	97,6%
- Quarterly Net Adds	0,473	0,387	0,080	0,450	0,729
- Year on year net growth (in %)	2,0%	2,1%	1,4%	2,0%	2,3%

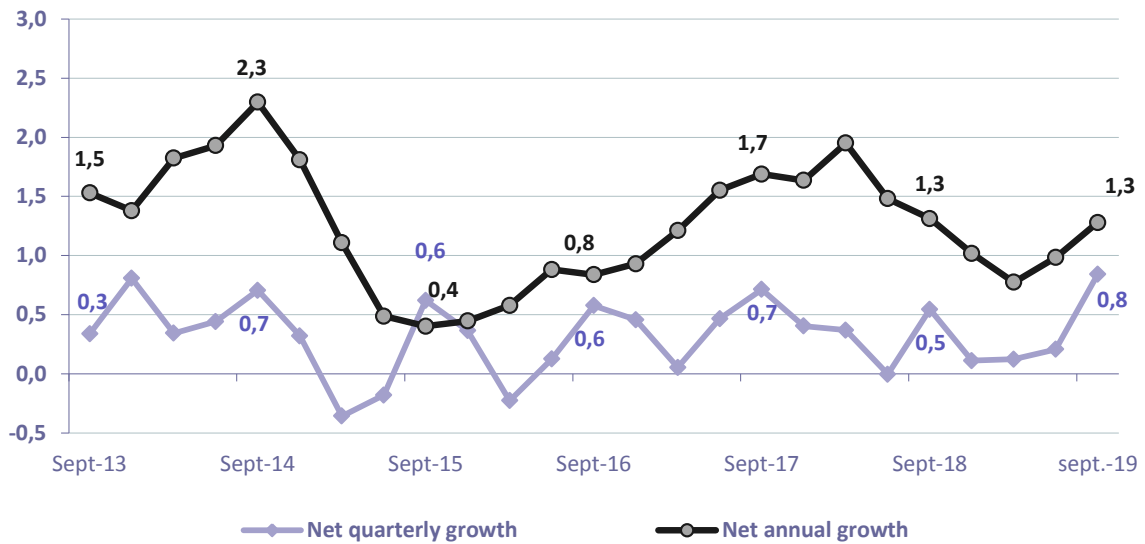
Number of metropolitan SIM cards

in millions



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

in millions



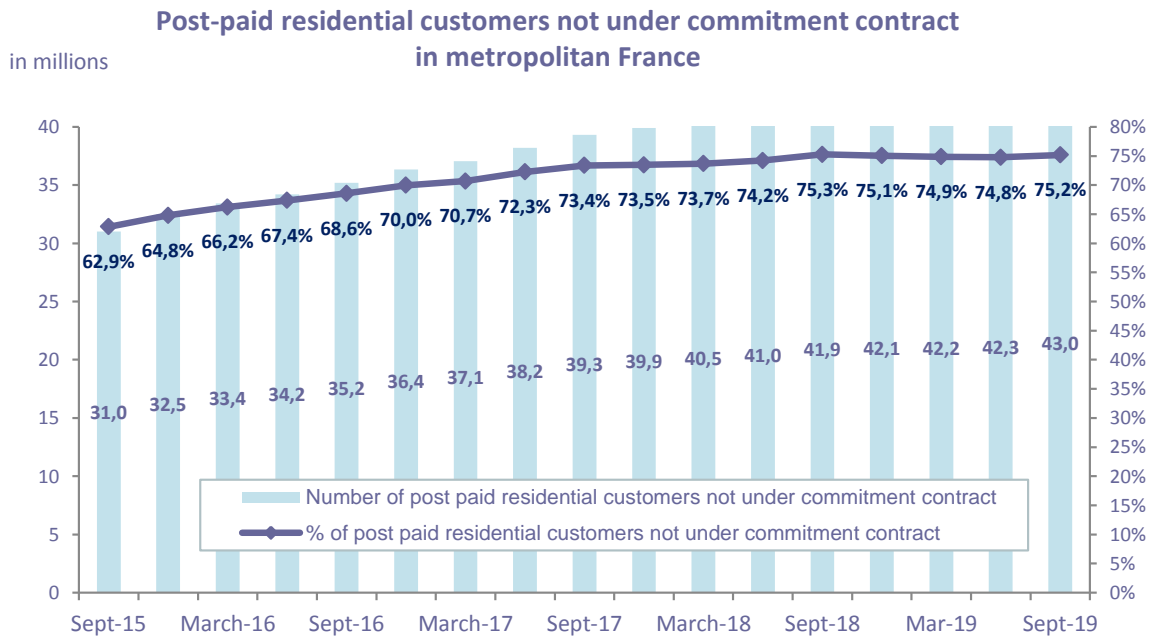
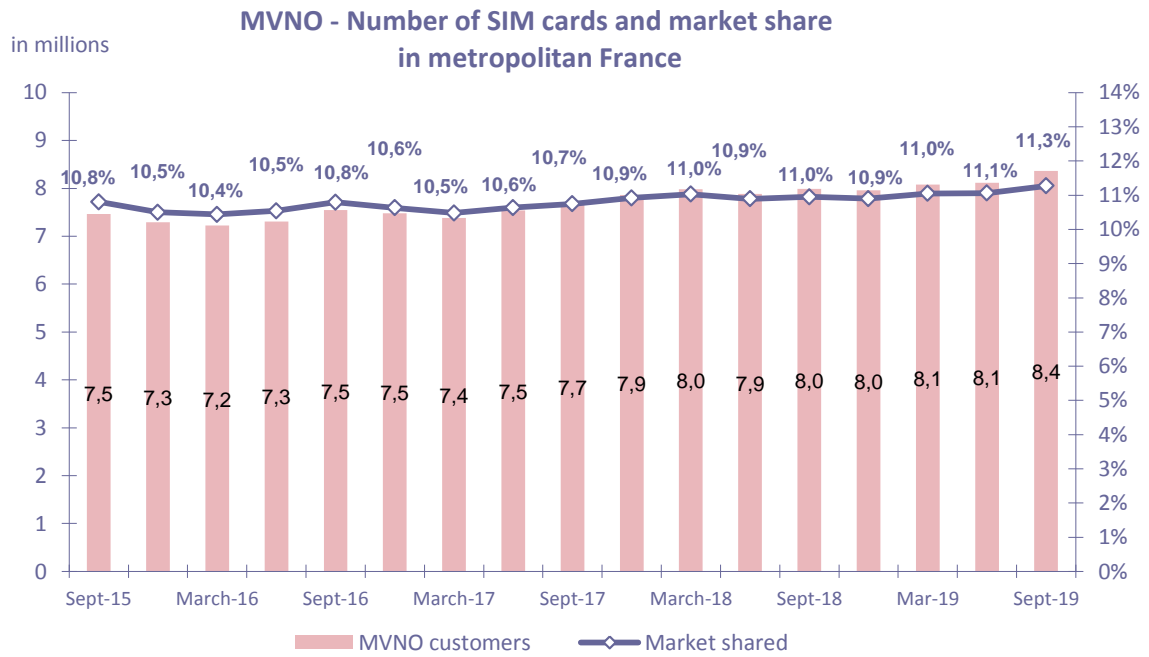
II.2 Virtual mobile network operators (MVNO) market share



	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Mobile networks operators (MNOs) customers	64,926	65,063	65,063	65,238	65,829
- Among which postpaid customers	60,521	60,886	61,083	61,312	61,860
- Quarterly Net Adds	0,442	0,137	0,000	0,175	0,591
- Year on year net growth (in %)	1,6%	1,4%	1,0%	1,2%	1,4%
MVNOs customers	7,987	7,960	8,082	8,113	8,362
- Quarterly Net Adds	3,914	4,037	4,092	4,233	4,299
- Year on year net growth (in %)	0,103	-0,027	0,123	0,031	0,249
	3,8%	1,3%	1,2%	2,9%	4,7%
MVNO Market share	11,0%	10,9%	11,0%	11,1%	11,3%
MVNO Market share of gross postpaid sales	7,4%	10,7%	9,7%	13,4%	8,8%
MVNO Market share of gross prepaid sales	62,3%	65,7%	63,0%	65,6%	63,7%

II.3 Market fluidity

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Quarterly postpaid cancellation rate	4,8%	4,6%	4,2%	3,7%	3,9%
Quarterly prepaid cancellation rate	26,0%	28,8%	23,4%	28,6%	27,1%
Numbers ported during the quarter	2,108	1,805	1,614	1,417	1,535
- Year on year net growth (in %)	19,4%	-26,4%	-24,5%	-31,4%	-27,2%
Post-paid residential customers not under commitment	41,941	42,126	42,168	42,311	42,957
- % of customers not under commitment contract	75,3%	75,1%	74,9%	74,8%	75,2%
Post-paid customers not under commitment contract	45,480	45,837	45,722	45,867	46,549
- % of customers not under commitment contract	70,6%	70,6%	70,2%	70,0%	70,4%



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET



III.1 Residential market - Total customers segmentation

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total residential customers	64,193	64,218	64,292	64,395	65,175
- Quarterly Net Adds	2,177	2,101	2,006	1,985	1,982
- Quarterly Net Adds	0,465	0,025	0,074	0,103	0,780
- Year on year net growth (in %)	1,6%	1,1%	0,8%	1,0%	1,5%
Postpaid residential customers	55,719	56,119	56,322	56,589	57,143
- Quarterly gross sales	3,341	3,047	2,539	2,347	2,822
- Quarterly Net Adds	0,529	0,401	0,203	0,268	0,554
- Year on year net growth (in %)	4,0%	3,3%	2,6%	2,5%	2,6%
Prepaid residential customers	8,475	8,099	7,970	7,805	8,031
- Quarterly gross sales	2,147	2,010	1,754	2,091	2,379
- Quarterly Net Adds	-0,064	-0,376	-0,129	-0,165	0,226
- Year on year net growth (in %)	-12,1%	-12,0%	-10,4%	-8,6%	-5,2%

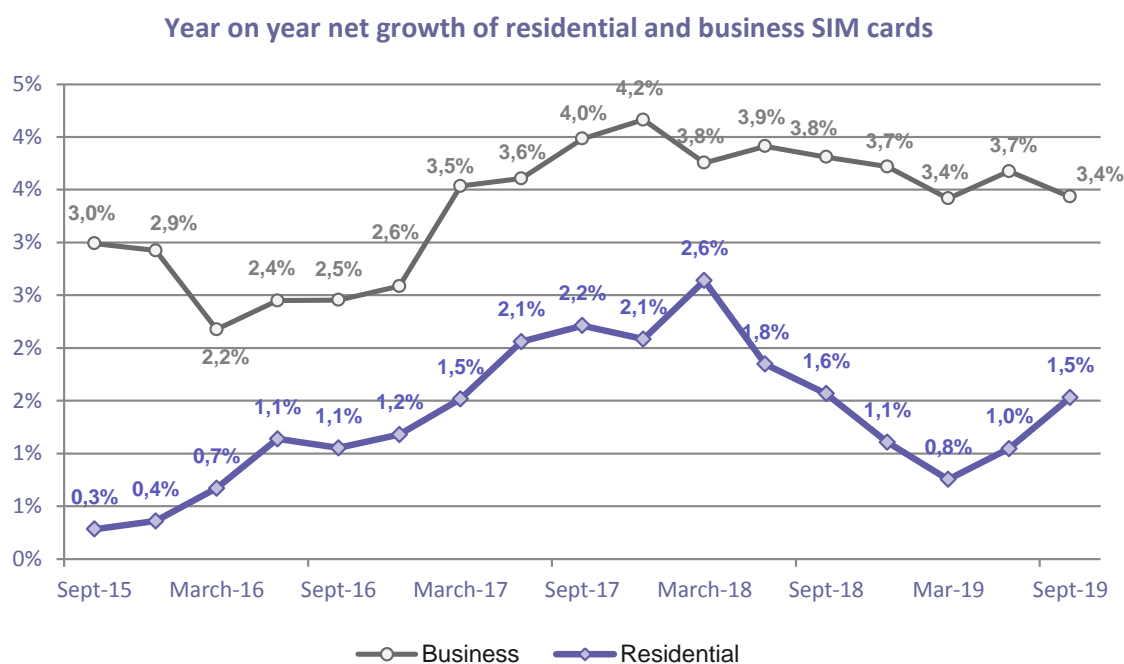
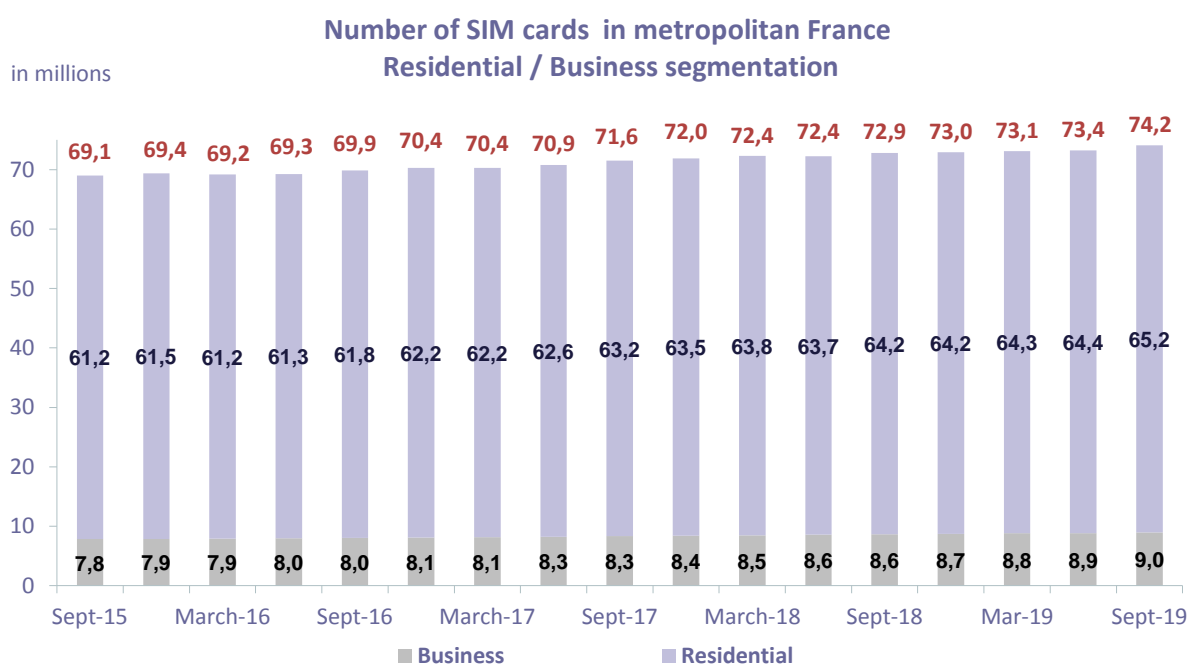
III.2 Residential market - Mobile Virtual Network Operators market share

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
MNOs	56,634	56,689	56,655	56,745	57,291
- Quarterly Net Adds	0,375	0,055	-0,034	0,090	0,546
- Year on year net growth (in %)	1,4%	1,2%	0,8%	0,9%	1,2%
MVNOs	7,559	7,529	7,637	7,650	7,884
- Quarterly Net Adds	0,090	-0,030	0,108	0,013	0,234
- Year on year net growth (in %)	3,1%	0,7%	0,7%	2,4%	4,3%
MVNO Market share	11,8%	11,7%	11,9%	11,9%	12,1%
MVNO Market share of gross postpaid sales	7,9%	11,6%	9,9%	14,1%	8,8%

III.3 Business market - total customers MtoM SIM cards excluded

Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
---------	--------	--------	--------	---------

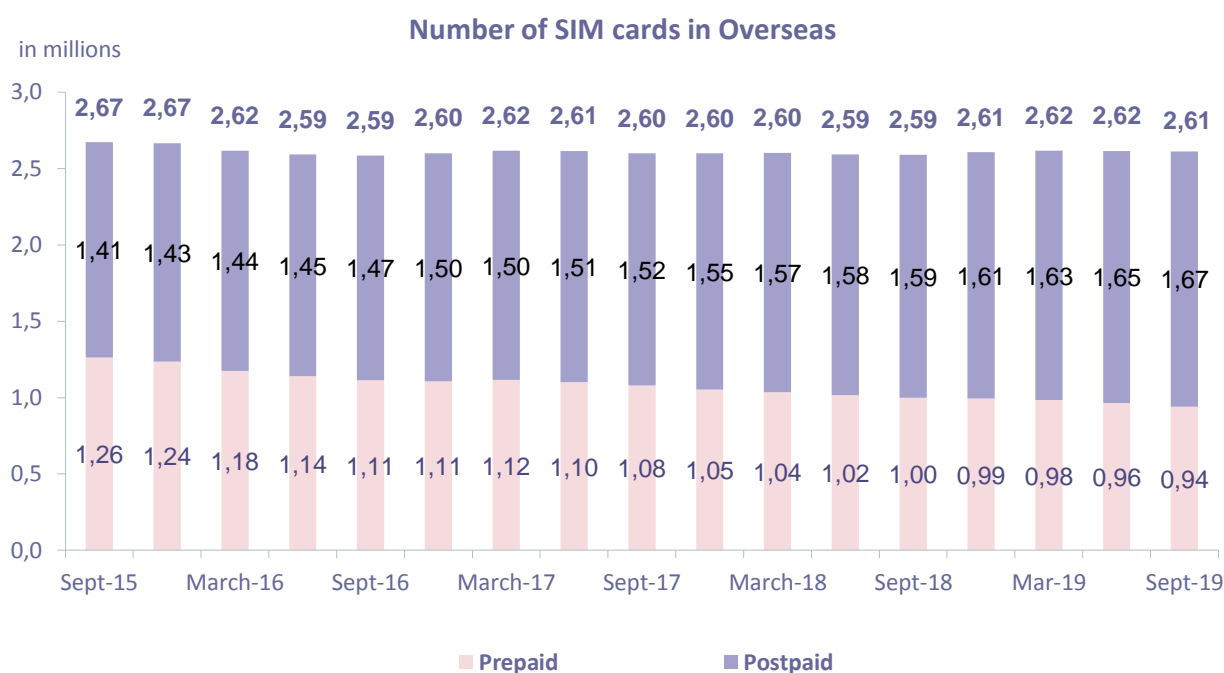
Postpaid business customers	8,717	8,804	8,853	8,956	9,016
among which Internet SIM cards	1,255	1,268	1,275	1,305	1,314
- Quarterly Net Adds	0,078	0,087	0,049	0,103	0,060
- Year on year net growth (in %)	3,8%	3,7%	3,4%	3,7%	3,4%



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

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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	2,591	2,607	2,617	2,615	2,614
- Quarterly Net Adds	-0,002	0,016	0,010	-0,002	-0,001
- Year on year net growth (in %)	-0,4%	0,3%	0,6%	0,8%	0,9%
Penetration Rate	116,9%	117,7%	117,2%	117,1%	117,0%
Population at January the 1st of previous year (source: Insee)	2,216		2,233		
Postpaid customers	1,591	1,614	1,633	1,650	1,674
- Quarterly Net Adds	0,015	0,023	0,019	0,017	0,024
- Year on year net growth (in %)	4,6%	4,3%	4,3%	4,7%	5,2%
Prepaid customers	1,000	0,993	0,984	0,965	0,940
- Quarterly Net Adds	-0,017	-0,007	-0,009	-0,019	-0,025
- Year on year net growth (in %)	-7,3%	-5,6%	-5,1%	-5,2%	-6,0%
Total active customers	2,327	2,342	2,346	2,348	2,352
- as a % of total customers	89,8%	89,8%	89,6%	89,8%	90,0%
- Quarterly Net Adds	-0,013	0,015	0,004	0,002	0,005
- Year on year net growth (in %)	0,3%	-0,7%	-0,6%	0,3%	1,1%



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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	0,619	0,618	0,626	0,628	0,624
- Quarterly Net Adds	-0,002	-0,001	0,007	0,003	-0,004
- Year on year net growth (in %)	-2,0%	-1,2%	-0,8%	1,1%	0,7%
Penetration Rate	143,6%	143,3%	145,8%	146,4%	145,4%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,431		0,429		
Postpaid customers	0,355	0,359	0,363	0,365	0,367
- Quarterly Net Adds	0,001	0,004	0,004	0,002	0,002
- Year on year net growth (in %)	3,1%	2,9%	2,9%	3,1%	3,2%
Prepaid customers	0,264	0,259	0,263	0,263	0,257
- Quarterly Net Adds	-0,003	-0,005	0,004	0,000	-0,006
- Year on year net growth (in %)	-8,2%	-6,3%	-5,5%	-1,6%	-2,6%
Total active customers	0,535	0,537	0,538	0,539	0,534
- as a % of total customers	86,4%	86,9%	86,0%	85,9%	85,6%
- Quarterly Net Adds	-0,012	0,002	0,001	0,001	-0,005
- Year on year net growth (in %)	-4,0%	-3,9%	-3,5%	-1,4%	-0,2%

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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	0,295	0,297	0,301	0,303	0,299
- Quarterly Net Adds	-0,002	0,002	0,004	0,002	-0,004
- Year on year net growth (in %)	-1,2%	0,5%	2,6%	1,8%	1,2%
Penetration Rate	102,6%	103,4%	101,5%	102,0%	100,7%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,288		0,297		
Postpaid customers	0,125	0,128	0,130	0,131	0,133
- Quarterly Net Adds	0,000	0,003	0,002	0,001	0,002
- Year on year net growth (in %)	4,6%	4,9%	5,3%	5,0%	6,2%
Prepaid customers	0,170	0,169	0,171	0,171	0,166
- Quarterly Net Adds	-0,003	-0,001	0,002	0,000	-0,006
- Year on year net growth (in %)	-5,1%	-2,7%	0,6%	-0,5%	-2,4%
Total active customers	0,258	0,261	0,260	0,261	0,260
- as a % of total customers	87,5%	87,7%	86,3%	86,2%	86,9%
- Quarterly Net Adds	-0,002	0,003	-0,001	0,001	-0,001
- Year on year net growth (in %)	-1,6%	0,2%	0,2%	0,2%	0,6%

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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	0,527	0,530	0,531	0,533	0,533
- Quarterly Net Adds	0,000	0,003	0,002	0,002	-0,001
- Year on year net growth (in %)	-0,4%	0,9%	0,8%	1,2%	1,2%
Penetration Rate	142,9%	143,7%	145,8%	146,4%	146,3%
Population at January the 1st of previous year (source: Insee)	0,369		0,364		
Postpaid customers	0,326	0,329	0,332	0,334	0,336
- Quarterly Net Adds	0,000	0,003	0,004	0,002	0,002
- Year on year net growth (in %)	2,0%	2,0%	2,5%	2,6%	3,2%
Prepaid customers	0,201	0,201	0,199	0,199	0,197
- Quarterly Net Adds	0,000	0,000	-0,002	0,000	-0,002
- Year on year net growth (in %)	-4,2%	-0,8%	-1,7%	-1,1%	-2,1%
Total active customers	0,445	0,445	0,448	0,449	0,446
- as a % of total customers	84,5%	84,1%	84,4%	84,1%	83,7%
- Quarterly Net Adds	-0,008	0,000	0,003	0,000	-0,003
- Year on year net growth (in %)	-2,8%	-3,3%	-2,3%	-0,9%	0,3%

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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	0,283	0,292	0,287	0,277	0,276
- Quarterly Net Adds	0,002	0,009	-0,005	-0,009	-0,001
- Year on year net growth (in %)	2,2%	3,6%	2,5%	-1,2%	-2,4%
Penetration Rate	108,6%	112,0%	106,0%	102,6%	102,1%
Population at January the 1st of previous year (source: Insee)	0,260		0,270		
Postpaid customers	0,065	0,066	0,066	0,065	0,066
- Quarterly Net Adds	0,000	0,000	0,000	0,000	0,001
- Year on year net growth (in %)	-0,8%	0,8%	-0,1%	-0,1%	1,1%
Prepaid customers	0,218	0,226	0,221	0,212	0,210
- Quarterly Net Adds	0,002	0,008	-0,005	-0,009	-0,002
- Year on year net growth (in %)	3,1%	4,5%	3,3%	-1,6%	-3,4%
Total active customers	0,247	0,252	0,250	0,246	0,249
- as a % of total customers	87,4%	86,4%	87,2%	88,6%	90,3%
- Quarterly Net Adds	0,005	0,005	-0,002	-0,004	0,004
- Year on year net growth (in %)	10,5%	6,9%	3,4%	1,7%	0,9%

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

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
Total customers	0,862	0,866	0,867	0,868	0,877
- Quarterly Net Adds	0,001	0,004	0,001	0,001	0,009
- Year on year net growth (in %)	0,4%	-0,2%	0,1%	0,8%	1,8%
Penetration Rate	100,0%	100,4%	100,1%	100,2%	101,2%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,862		0,867		
Postpaid customers	0,715	0,728	0,738	0,750	0,767
- Quarterly Net Adds	0,014	0,013	0,010	0,012	0,017
- Year on year net growth (in %)	7,0%	6,3%	6,2%	6,9%	7,3%
Prepaid customers	0,147	0,138	0,130	0,119	0,110
- Quarterly Net Adds	-0,013	-0,009	-0,008	-0,011	-0,009
- Year on year net growth (in %)	-22,9%	-24,5%	-24,6%	-26,0%	-25,4%
Total active customers	0,837	0,841	0,845	0,847	0,858
- as a % of total customers	97,1%	97,2%	97,4%	97,6%	97,8%
- Quarterly Net Adds	0,004	0,005	0,003	0,003	0,010
- Year on year net growth (in %)	2,7%	0,5%	1,0%	1,7%	2,5%

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

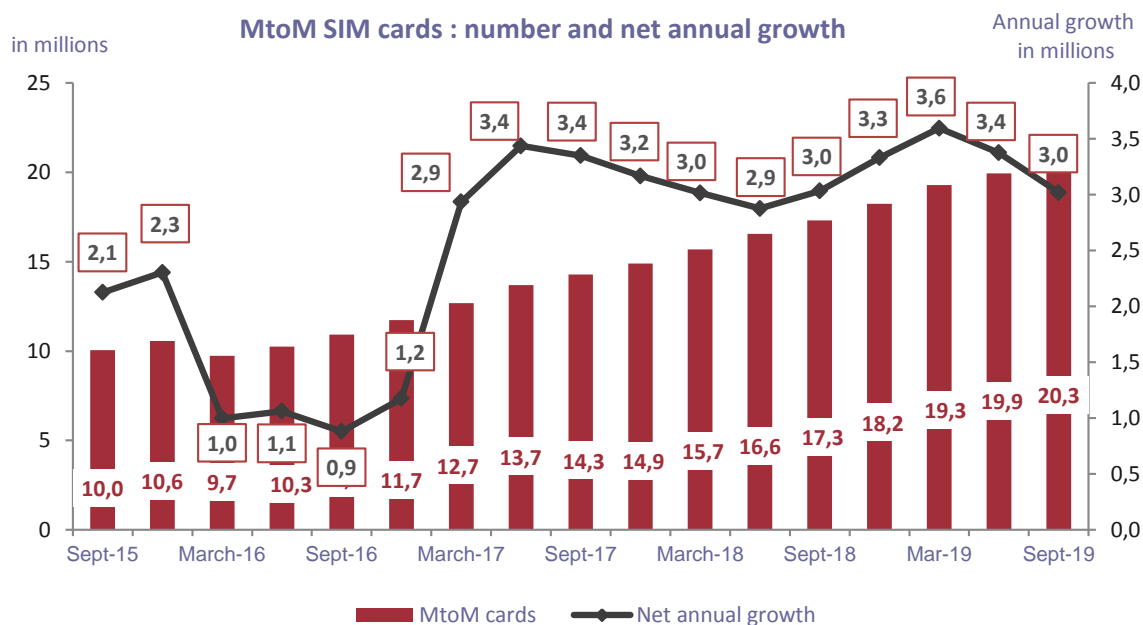
	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
MtoM SIM cards	17,312	18,238	19,287	19,944	20,331
-Gross sales for the quarter	0,899	1,086	1,161	0,808	0,646
- Quarterly Net Adds	0,744	0,926	1,050	0,657	0,387
- Year on year net growth (in %)	21,2%	22,4%	22,9%	20,4%	17,4%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
MtoM SIM cards	17,279	18,203	19,252	19,908	20,297
- Quarterly Net Adds	0,743	0,924	1,049	0,656	0,389
- Year on year net growth (in %)	21,3%	22,4%	22,9%	20,4%	17,5%

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	Sept-18	Dec-18	Mar-19	Jun-19	Sept-19
MtoM SIM cards	0,033	0,035	0,035	0,036	0,034
- Quarterly Net Adds	0,000	0,001	0,001	0,000	-0,002
- Year on year net growth (in %)	3,5%	6,7%	9,8%	8,1%	2,3%
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 2019, comes from estimates published in January 2019 (and therefore of the population for January 1st, 2018).

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, Maoré Mobile, Zeop.
- Mobile Virtual Network Operators independent of mobile network operators active on the quarter.