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ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

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SUMMARY

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

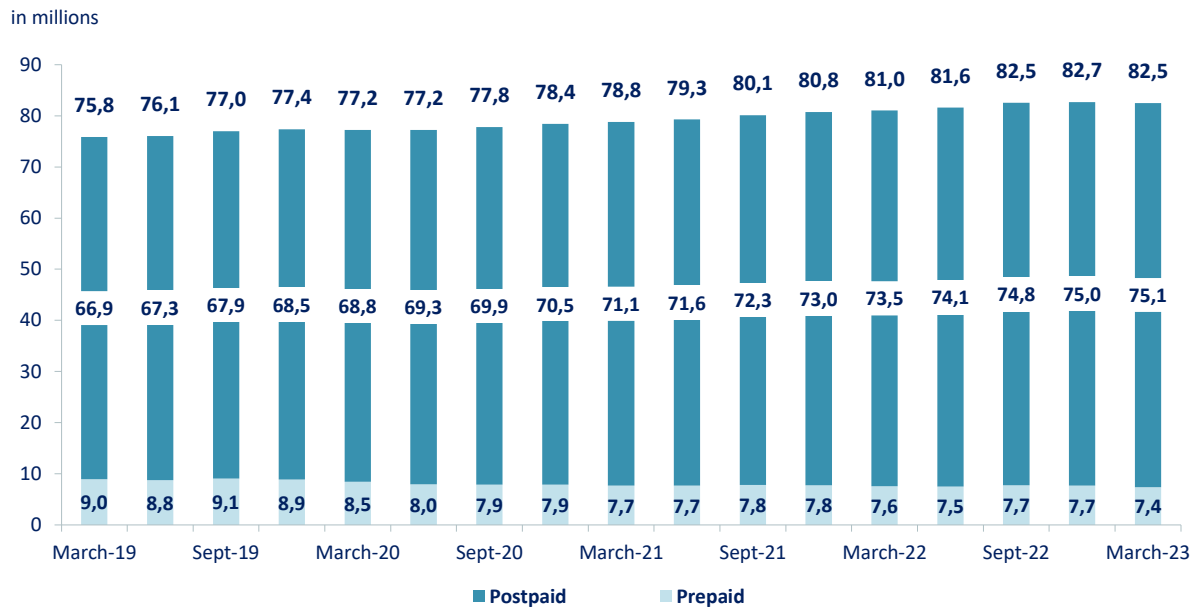
The quarterly figures relating to the sales turnover and traffic are published three months after the end of the quarter within the [telecommunications observatory in France](#). Except opposite mention, indicators are in millions of units.

A. Mobiles services market - MtoM SIM cards excluded

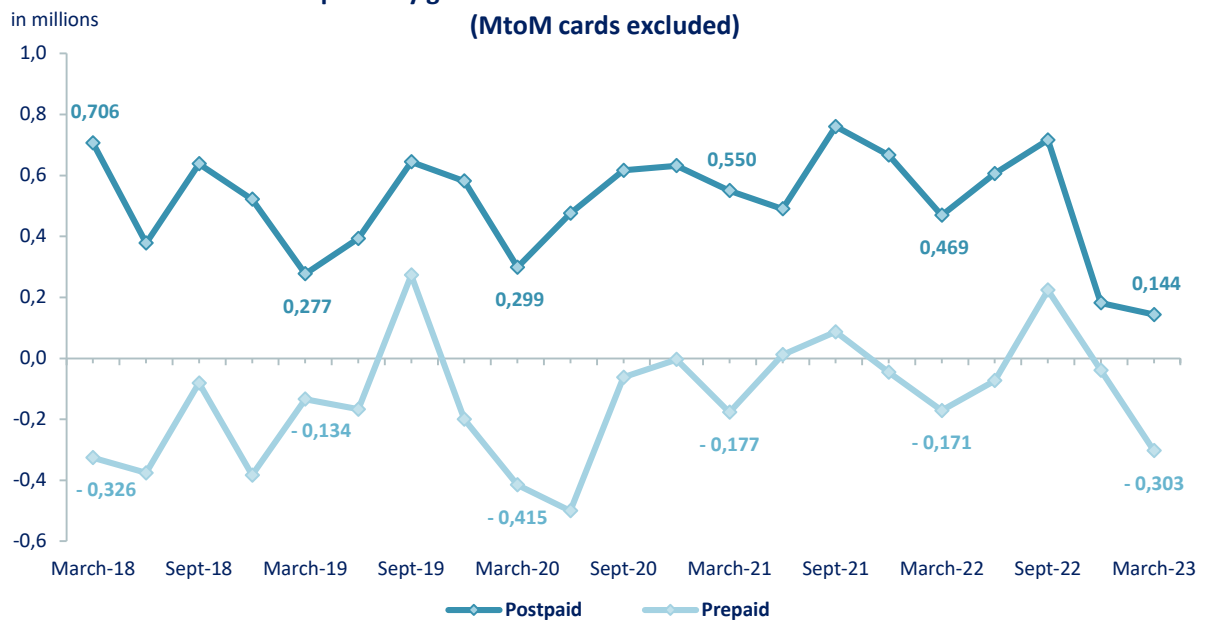
I. National Report - Total customers and active customers

	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	81,049	81,582	82,522	82,665	82,505
- Quarterly Net Adds	0,298	0,533	0,940	0,143	-0,160
- Year on year net growth (in %)	2,9%	2,9%	3,0%	2,4%	1,8%
Penetration Rate	119,4%	120,2%	121,6%	121,8%	121,2%
<i>Population at January the 1st of previous year (source: Insee)</i>		67,863			68,092
Postpaid customers	73,460	74,066	74,782	74,964	75,108
- Quarterly Net Adds	0,469	0,606	0,716	0,182	0,144
- Year on year net growth (in %)	3,4%	3,5%	3,4%	2,7%	2,2%
Prepaid customers	7,589	7,516	7,740	7,701	7,397
- Quarterly Net Adds	-0,171	-0,073	0,224	-0,039	-0,303
- Year on year net growth (in %)	-1,5%	-2,6%	-0,8%	-0,8%	-2,5%
	March-22	Jun-22	Sept-22	Dec-22	March-23
Total active customers	78,737	79,294	80,126	80,254	80,165
- as a % of total customers	97,1%	97,2%	97,1%	97,1%	97,2%
- Quarterly Net Adds	0,200	0,557	0,832	0,127	-0,088
- Year on year net growth (in %)	2,9%	3,0%	2,9%	2,2%	1,8%
Adjusted figure					

Number of SIM cards in France (MtoM cards excluded)



Net quarterly growth of the number of SIM cards in France (MtoM cards excluded)



II. Metropolitan report

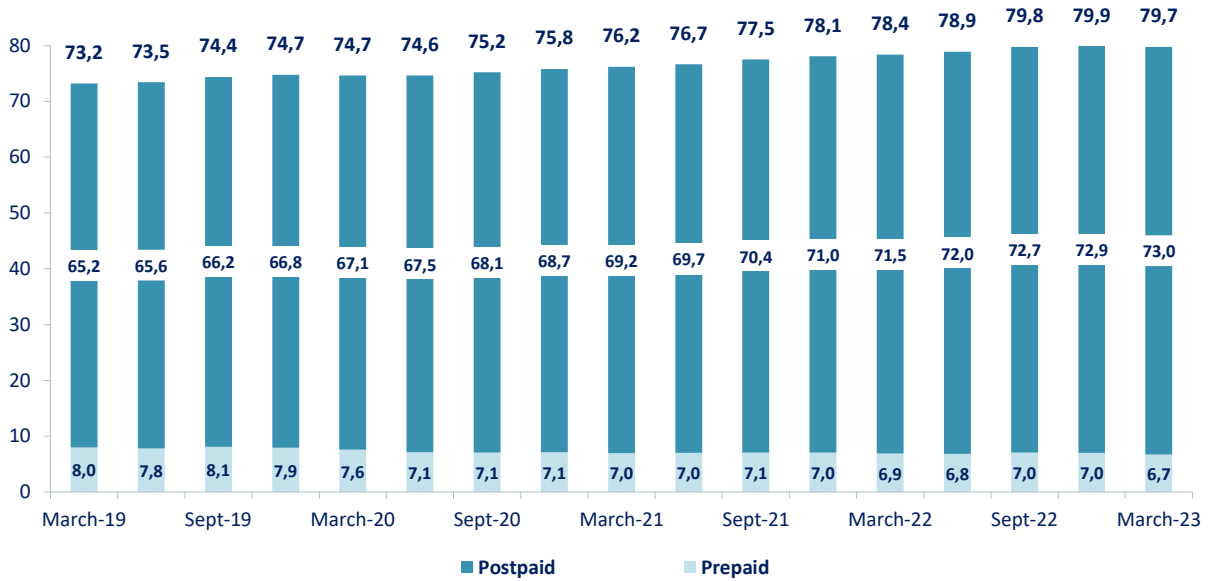
1. Total customers segmentation and total active customers (excluding MtoM SIM cards)



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	78,355	78,863	79,773	79,897	79,744
among which Internet SIM cards	3,633	3,731	3,814	3,787	3,737
- Quarterly Net Adds	0,280	0,508	0,910	0,124	-0,153
- Year on year net growth (in %)	2,9%	2,9%	2,9%	2,3%	1,8%
Penetration Rate	119,4%	120,2%	121,6%	121,7%	121,1%
<i>Population at January the 1st of previous year (source: Insee)</i>		65,627			65,835
Postpaid customers	71,470	72,046	72,728	72,876	73,000
among which Internet SIM cards	2,998	3,072	3,125	3,195	3,282
- Quarterly gross sales	3,339	3,283	3,535	3,179	3,046
- Quarterly Net Adds	0,439	0,576	0,681	0,148	0,124
- Year on year net growth (in %)	3,3%	3,4%	3,3%	2,6%	2,1%
Prepaid customers	6,886	6,817	7,045	7,021	6,745
among which Internet SIM cards	0,635	0,659	0,689	0,592	0,455
- Quarterly gross sales	1,682	1,819	2,048	1,882	1,691
- Quarterly Net Adds	-0,159	-0,069	0,228	-0,024	-0,276
- Year on year net growth (in %)	-1,0%	-2,6%	-0,8%	-0,3%	-2,0%
Total active customers	76,239	76,780	77,582	77,711	77,605
- as a % of total customers	97,3%	97,4%	97,3%	97,3%	97,3%
- Quarterly Net Adds	0,181	0,541	0,802	0,129	-0,105
- Year on year net growth (in %)	2,8%	3,0%	2,9%	2,2%	1,8%
Adjusted figure					

Number of metropolitan SIM cards (MtoM cards excluded)

in millions



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

in millions



2. Virtual mobile network operators (MVNO) market share

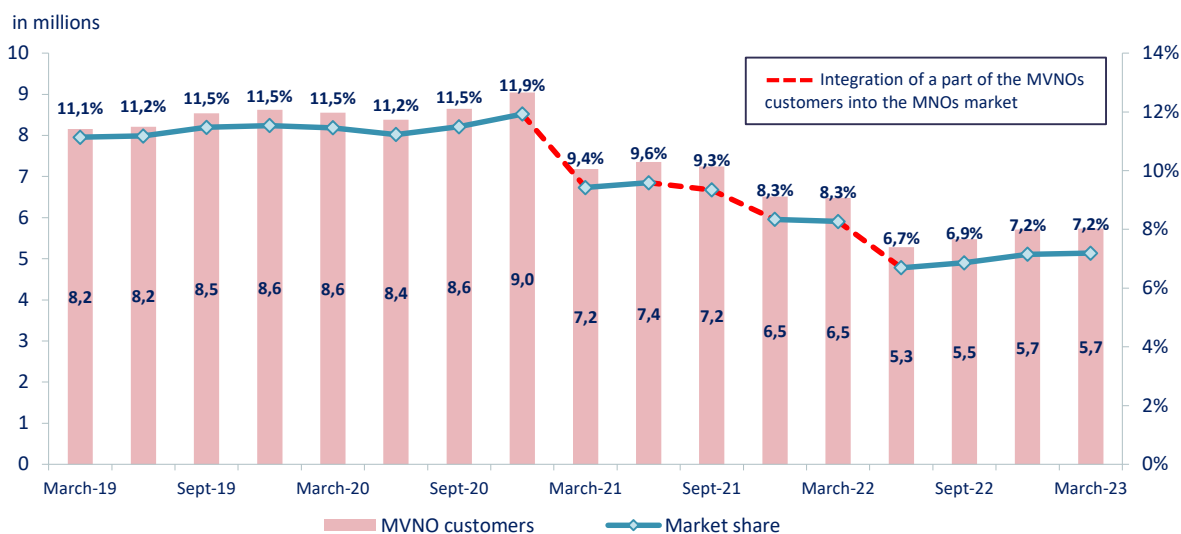


	March-22	Jun-22	Sept-22	Dec-22	March-23
Mobile networks operators (MNOs) customers	71,876	73,583	74,299	74,183	74,011
- Among which postpaid customers	68,049	69,419	70,030	70,074	70,106
- Quarterly Net Adds	0,311	1,707	0,716	-0,116	-0,173
- Year on year net growth (in %)	4,2%	6,1%	5,8%	3,7%	3,0%
MVNOs customers	6,479	5,280	5,473	5,714	5,734
- Among which postpaid customers	3,421	2,627	2,698	2,802	2,894
- Quarterly Net Adds	-0,031	-1,199	0,193	0,241	0,020
- Year on year net growth (in %)	-9,7%	-28,2%	-24,4%	-12,2%	-11,5%
MVNO Market share	8,3%	6,7%	6,9%	7,2%	7,2%
MVNO Market share of gross postpaid sales	8,3%	5,4%	5,3%	7,5%	7,0%
MVNO Market share of gross prepaid sales	56,4%	50,7%	46,2%	47,2%	46,6%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

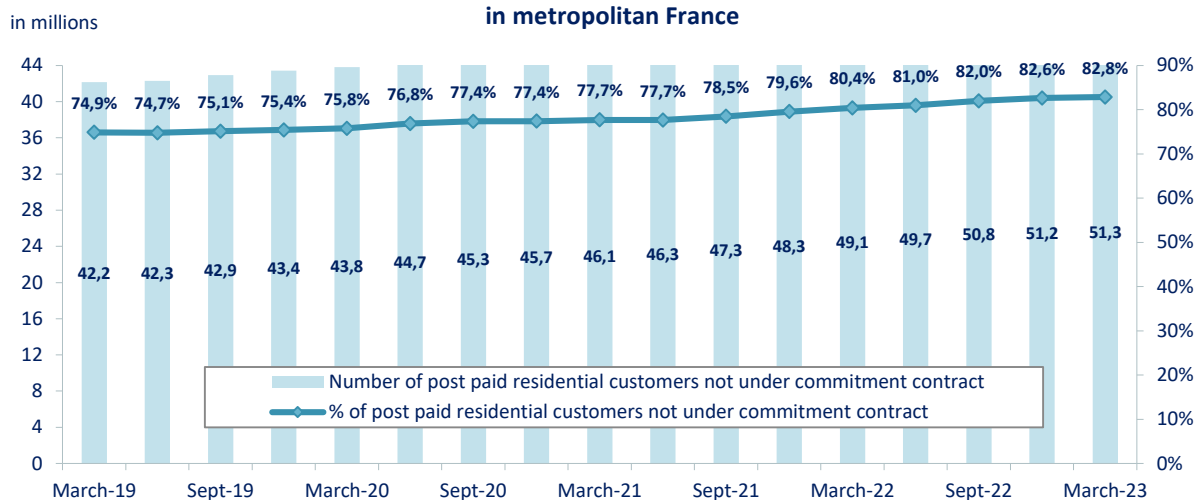
3. Market fluidity

	March-22	Jun-22	Sept-22	Dec-22	March-23
Quarterly postpaid cancellation rate	4,1%	3,8%	4,0%	4,2%	4,0%
Quarterly prepaid cancellation rate	26,3%	27,4%	26,2%	27,0%	28,5%
Numbers ported during the quarter	1,791	1,613	1,640	1,562	1,635
- Year on year net growth (in %)	3,2%	-9,2%	-0,4%	-16,1%	-8,7%
Post-paid residential customers not under commitment	49,059	49,703	50,765	51,151	51,266
- % of customers not under commitment contract	80,4%	81,0%	82,0%	82,6%	82,8%
Post-paid customers not under commitment contract	53,021	53,751	54,834	55,438	55,609
- % of customers not under commitment contract	74,2%	74,6%	75,4%	76,1%	76,2%
Adjusted figure					

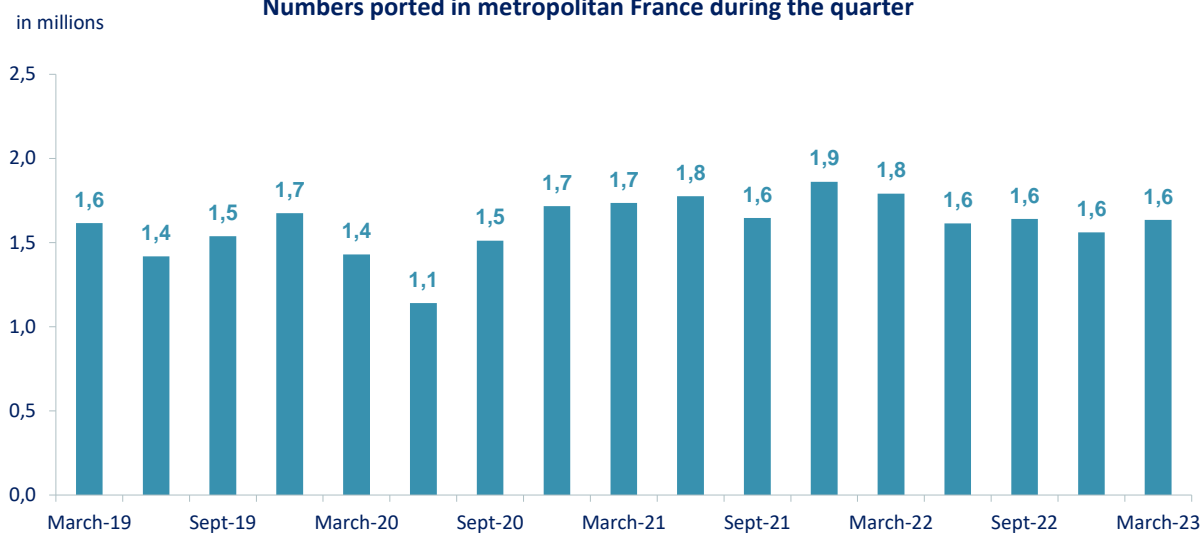
MVNO - Number of SIM cards and market share in metropolitan France



Post-paid residential customers not under commitment contract in metropolitan France



Numbers ported in metropolitan France during the quarter



III. Metropolitan residential and business market segmentation



1. Residential market - Total customers segmentation

	March-22	Jun-22	Sept-22	Dec-22	March-23
Total residential customers	67,898	68,214	68,954	68,916	68,629
among which Internet SIM cards	2,185	2,243	2,292	2,228	2,137
- Quarterly Net Adds	0,135	0,316	0,740	-0,038	-0,287
- Year on year net growth (in %)	2,4%	2,3%	2,4%	1,7%	1,1%
Postpaid residential customers	61,013	61,397	61,909	61,895	61,884
- Quarterly gross sales	2,878	2,786	3,066	2,663	2,507
- Quarterly Net Adds	0,295	0,384	0,512	-0,014	-0,011
- Year on year net growth (in %)	2,8%	2,9%	2,7%	1,9%	1,4%
Prepaid residential customers	6,886	6,817	7,045	7,021	6,745
- Quarterly gross sales	1,682	1,819	2,048	1,882	1,691
- Quarterly Net Adds	-0,159	-0,069	0,228	-0,024	-0,276
- Year on year net growth (in %)	-1,0%	-2,6%	-0,8%	-0,3%	-2,0%

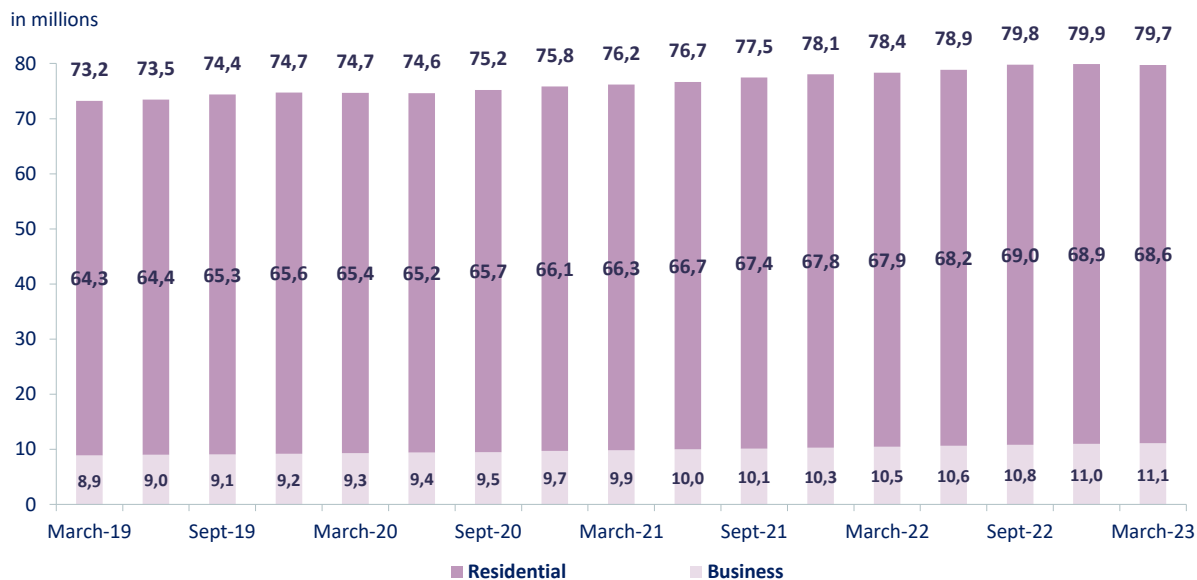
2. Residential market - Mobile Virtual Network Operators market share

	March-22	Jun-22	Sept-22	Dec-22	March-23
MNOs	62,177	63,495	64,059	63,793	63,506
- Quarterly Net Adds	0,198	1,318	0,564	-0,267	-0,287
- Year on year net growth (in %)	4,1%	5,9%	5,4%	2,9%	2,1%
MVNOs	5,721	4,719	4,895	5,124	5,123
- Quarterly Net Adds	-0,063	-1,003	0,176	0,229	0,000
- Year on year net growth (in %)	-13,0%	-29,7%	-25,4%	-11,4%	-10,5%
MVNO Market share	8,4%	6,9%	7,1%	7,4%	7,5%
MVNO Market share of gross postpaid sales	7,6%	4,5%	4,7%	6,9%	6,5%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

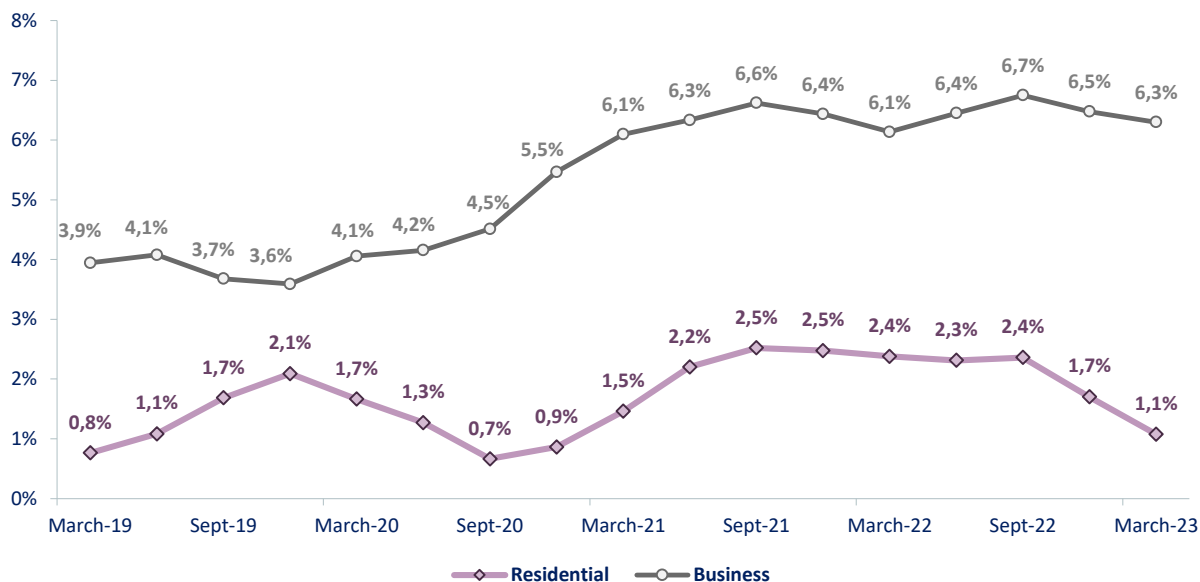
3. Business market - total customers MtoM SIM cards excluded

	March-22	Jun-22	Sept-22	Dec-22	March-23
Postpaid business customers	10,457	10,649	10,818	10,980	11,116
among which Internet SIM cards	1,449	1,487	1,522	1,559	1,600
- Quarterly Net Adds	0,144	0,192	0,169	0,162	0,135
- Year on year net growth (in %)	6,1%	6,4%	6,7%	6,5%	6,3%
Adjusted figure					

Number of SIM cards in metropolitan France Residential / Business segmentation



Year on year net growth of residential and business SIM cards

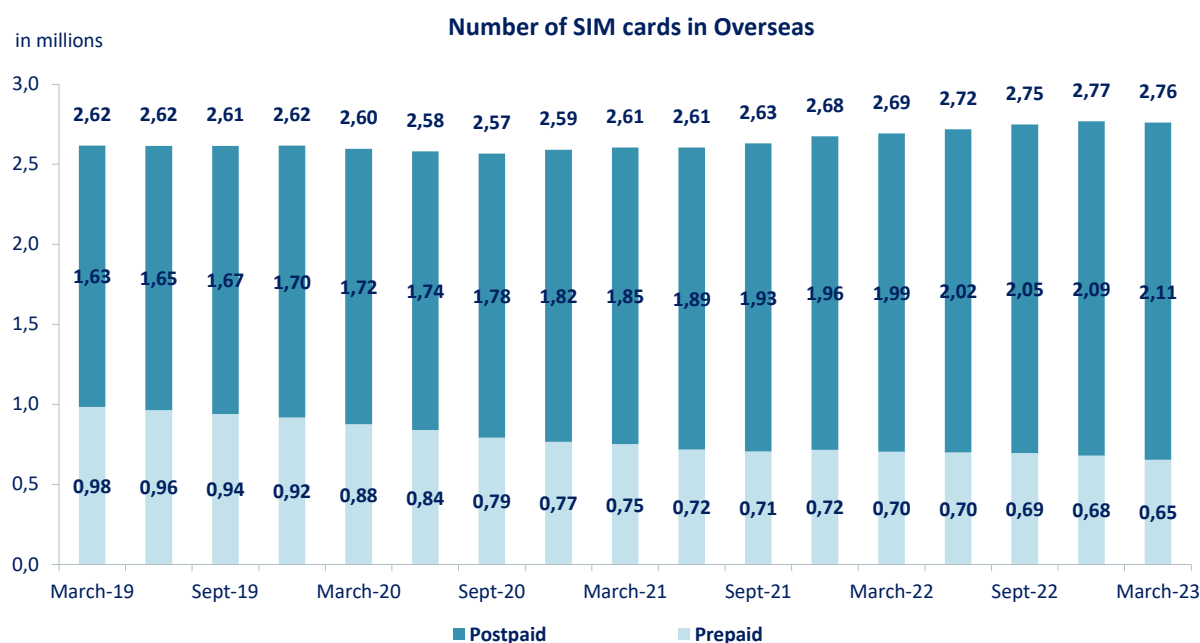


IV. Overseas report: DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

1. Overseas départements: total customers and total active customers segmentation

	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	2,693	2,719	2,749	2,768	2,760
- Quarterly Net Adds	0,018	0,025	0,031	0,019	-0,008
- Year on year net growth (in %)	3,4%	4,3%	4,5%	3,5%	2,5%
Penetration Rate	120,5%	121,6%	123,0%	123,8%	122,3%
<i>Population at January the 1st of previous year (source: Insee)</i>		2,236			2,257
Postpaid customers	1,990	2,020	2,055	2,088	2,108
- Quarterly Net Adds	0,030	0,030	0,035	0,034	0,019
- Year on year net growth (in %)	7,3%	7,0%	6,7%	6,5%	5,9%
Prepaid customers	0,704	0,699	0,695	0,680	0,653
- Quarterly Net Adds	-0,012	-0,005	-0,004	-0,015	-0,027
- Year on year net growth (in %)	-6,3%	-2,6%	-1,6%	-5,0%	-7,2%
Total active customers	2,499	2,515	2,544	2,543	2,560
- as a % of total customers	92,8%	92,5%	92,5%	91,9%	92,7%
- Quarterly Net Adds	0,019	0,016	0,030	-0,001	0,017
- Year on year net growth (in %)	3,9%	3,7%	4,0%	2,5%	2,5%

Adjusted figure



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



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	0,629	0,637	0,648	0,648	0,653
- Quarterly Net Adds	0,006	0,008	0,011	0,000	0,006
- Year on year net growth (in %)	3,1%	5,3%	5,7%	4,0%	3,8%
Penetration Rate	151,1%	153,0%	155,6%	155,5%	156,0%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,416			0,419
Postpaid customers	0,437	0,445	0,454	0,462	0,466
- Quarterly Net Adds	0,008	0,008	0,009	0,008	0,004
- Year on year net growth (in %)	7,8%	7,5%	7,6%	7,6%	6,6%
Prepaid customers	0,192	0,192	0,194	0,185	0,187
- Quarterly Net Adds	-0,001	0,000	0,001	-0,008	0,002
- Year on year net growth (in %)	-6,2%	0,5%	1,4%	-4,1%	-2,5%
Total active customers	0,558	0,564	0,573	0,576	0,581
- as a % of total customers	88,7%	88,4%	88,5%	88,9%	88,9%
- Quarterly Net Adds	0,005	0,005	0,010	0,003	0,005
- Year on year net growth (in %)	3,2%	3,1%	4,9%	4,0%	4,0%

3. Guyane: total customers and total active customers segmentation



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	0,301	0,305	0,311	0,313	0,311
- Quarterly Net Adds	0,005	0,004	0,006	0,002	-0,002
- Year on year net growth (in %)	6,8%	9,3%	8,8%	5,6%	3,4%
Penetration Rate	102,2%	103,4%	105,6%	106,2%	103,3%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,294			0,301
Postpaid customers	0,193	0,196	0,201	0,206	0,209
- Quarterly Net Adds	0,006	0,003	0,004	0,005	0,003
- Year on year net growth (in %)	16,9%	13,4%	11,5%	9,8%	7,9%
Prepaid customers	0,107	0,108	0,110	0,107	0,102
- Quarterly Net Adds	-0,001	0,001	0,002	-0,003	-0,005
- Year on year net growth (in %)	-7,5%	2,5%	4,0%	-1,6%	-4,8%
Total active customers	0,289	0,296	0,304	0,306	0,304
- as a % of total customers	96,1%	97,3%	97,8%	97,8%	97,8%
- Quarterly Net Adds	0,005	0,007	0,008	0,002	-0,002
- Year on year net growth (in %)	8,3%	9,6%	9,5%	7,7%	5,2%
Adjusted figure					

4. Martinique: total customers and total active customers segmentation



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	0,523	0,527	0,532	0,536	0,538
- Quarterly Net Adds	0,002	0,004	0,004	0,005	0,002
- Year on year net growth (in %)	2,0%	2,2%	3,4%	2,9%	2,9%
Penetration Rate	149,3%	150,5%	151,8%	153,1%	154,8%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,350			0,348
Postpaid customers	0,376	0,380	0,384	0,388	0,390
- Quarterly Net Adds	0,004	0,004	0,004	0,004	0,002
- Year on year net growth (in %)	4,5%	4,4%	4,1%	4,1%	3,6%
Prepaid customers	0,147	0,147	0,148	0,149	0,148
- Quarterly Net Adds	-0,002	0,000	0,001	0,001	-0,001
- Year on year net growth (in %)	-4,0%	-2,9%	1,7%	0,0%	1,0%
Total active customers	0,457	0,457	0,461	0,465	0,466
- as a % of total customers	87,3%	86,7%	86,6%	86,6%	86,7%
- Quarterly Net Adds	0,004	0,001	0,004	0,004	0,002
- Year on year net growth (in %)	2,2%	1,3%	2,8%	2,6%	2,1%

5. Mayotte: total customers and total active customers segmentation



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	0,297	0,299	0,299	0,304	0,290
- Quarterly Net Adds	0,001	0,001	0,000	0,005	-0,014
- Year on year net growth (in %)	3,4%	4,4%	3,7%	2,6%	-2,5%
Penetration Rate	99,3%	99,7%	99,9%	101,7%	93,6%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,299			0,310
Postpaid customers	0,094	0,098	0,104	0,111	0,116
- Quarterly Net Adds	0,004	0,004	0,006	0,008	0,005
- Year on year net growth (in %)	17,3%	18,8%	21,0%	24,1%	24,2%
Prepaid customers	0,204	0,201	0,195	0,193	0,174
- Quarterly Net Adds	-0,003	-0,003	-0,006	-0,002	-0,019
- Year on year net growth (in %)	-2,0%	-1,4%	-3,6%	-6,7%	-14,7%
Total active customers	0,259	0,256	0,255	0,246	0,251
- as a % of total customers	87,2%	85,6%	85,4%	80,7%	86,6%
- Quarterly Net Adds	-0,002	-0,004	0,000	-0,010	0,006
- Year on year net growth (in %)	4,5%	2,2%	0,2%	-6,1%	-3,1%
Adjusted figure					

6. Réunion: total customers and total active customers segmentation



	March-22	Jun-22	Sept-22	Dec-22	March-23
Total customers	0,938	0,945	0,954	0,961	0,963
- Quarterly Net Adds	0,004	0,008	0,009	0,007	0,001
- Year on year net growth (in %)	3,3%	3,4%	3,2%	3,0%	2,7%
Penetration Rate	107,9%	108,8%	109,8%	110,7%	110,3%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,869			0,873
Postpaid customers	0,884	0,895	0,907	0,916	0,922
- Quarterly Net Adds	0,008	0,011	0,012	0,009	0,005
- Year on year net growth (in %)	5,4%	5,5%	4,9%	4,6%	4,2%
Prepaid customers	0,053	0,050	0,047	0,045	0,041
- Quarterly Net Adds	-0,004	-0,003	-0,003	-0,002	-0,004
- Year on year net growth (in %)	-22,8%	-23,1%	-22,0%	-20,9%	-23,0%
Total active customers	0,930	0,937	0,946	0,946	0,952
- as a % of total customers	99,2%	99,1%	99,1%	98,4%	98,9%
- Quarterly Net Adds	0,007	0,007	0,009	0,000	0,006
- Year on year net growth (in %)	3,6%	3,8%	3,5%	2,5%	2,4%

B. Internet of things: MtoM SIM cards

I. MtoM cards of French operators

	March-22	Jun-22	Sept-22	Dec-22	March-23
MtoM SIM cards	23,958	24,069	23,780	23,884	24,193
- Gross sales for the quarter	0,629	0,561	0,556	0,625	0,690
- Quarterly Net Adds	0,357	0,111	-0,289	0,104	0,309
- Year on year net growth (in %)	5,5%	5,0%	2,5%	1,2%	1,0%

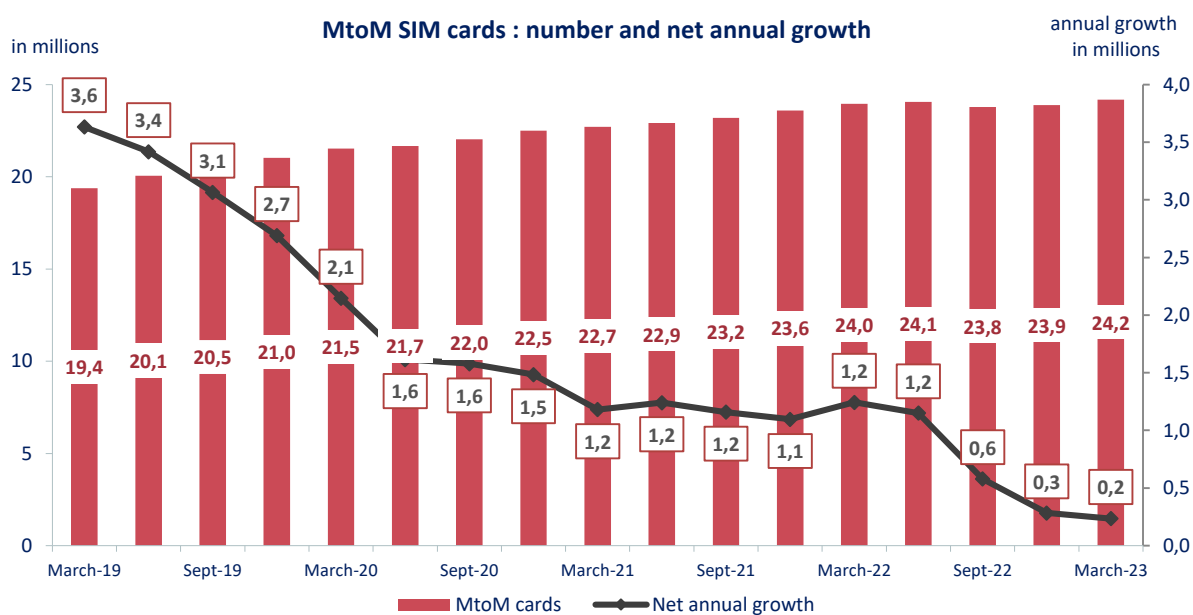
1. MtoM cards of French operators - Metropolitan

	March-22	Jun-22	Sept-22	Dec-22	March-23
MtoM SIM cards	23,929	24,040	23,751	23,856	24,164
- Quarterly Net Adds	0,357	0,111	-0,289	0,104	0,309
- Year on year net growth (in %)	5,5%	5,0%	2,5%	1,2%	1,0%

2. MtoM cards of French operators - Overseas departments

	March-22	Jun-22	Sept-22	Dec-22	March-23
MtoM SIM cards	0,029	0,029	0,029	0,028	0,028
- Quarterly Net Adds	0,000	0,000	0,000	0,000	0,000
- Year on year net growth (in %)	-13,1%	-9,2%	-5,1%	-2,1%	-3,0%

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 2021, comes from estimates published in January 2021 (and therefore of the population for January 1st, 2020).

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, Free Caraïbe, Globaltel, Orange Caraïbe, 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.