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MOBILES SERVICES

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ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

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A decorative graphic in the bottom right corner consisting of a dense, overlapping pattern of thin, grey, curved lines that resemble a stylized flower or a complex network structure.

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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

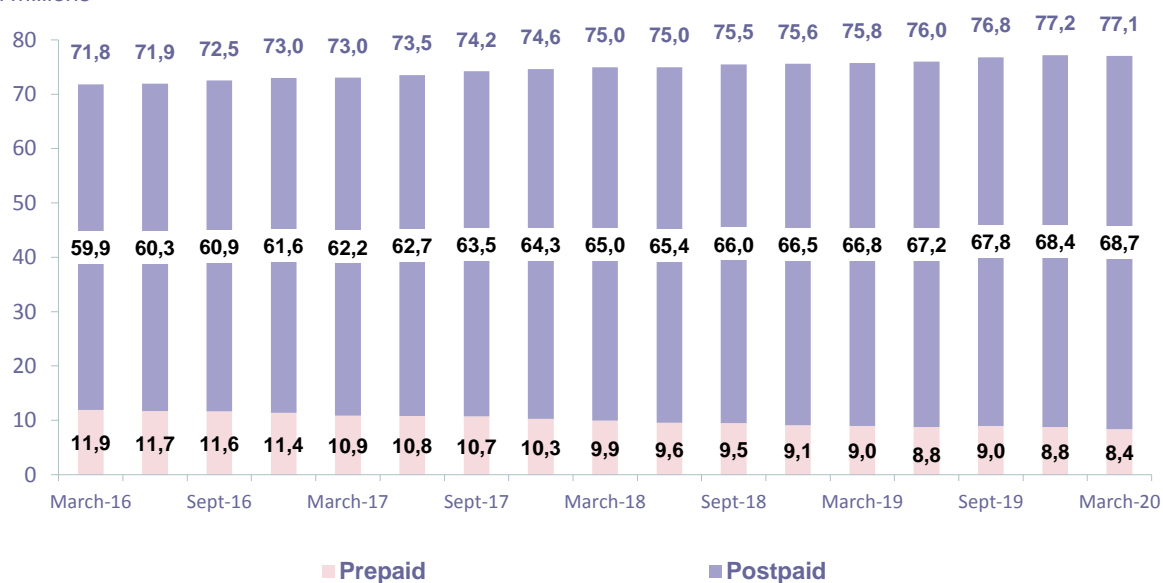
A - Mobiles services market - MtoM SIM cards excluded

I. NATIONAL REPORT - total customers and active customers

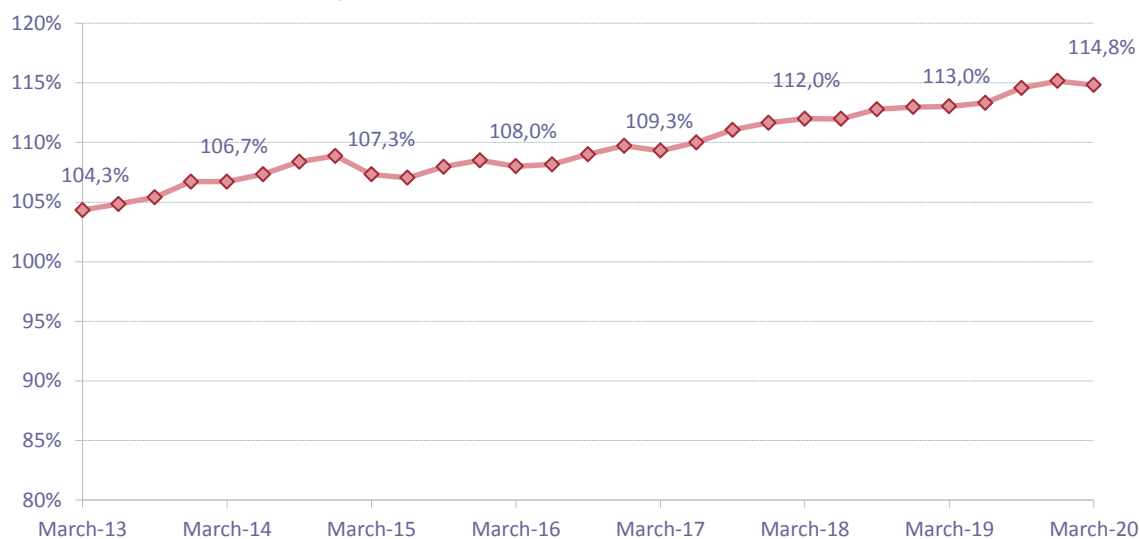
	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	75,762	75,965	76,803	77,187	77,056
- Quarterly Net Adds	0,133	0,203	0,838	0,383	-0,131
- Year on year net growth (in %)	1,1%	1,3%	1,7%	2,1%	1,7%
Penetration Rate	113,0%	113,3%	114,6%	115,2%	114,8%
<i>Population at January the 1st of previous year (source: Insee)</i>	67,030				67,115
Postpaid customers	66,808	67,195	67,832	68,407	68,695
- Quarterly Net Adds	0,271	0,387	0,637	0,575	0,289
- Year on year net growth (in %)	2,7%	2,7%	2,7%	2,8%	2,8%
Prepaid customers	8,954	8,770	8,971	8,780	8,360
- Quarterly Net Adds	-0,138	-0,184	0,201	-0,191	-0,420
- Year on year net growth (in %)	-9,9%	-8,2%	-5,3%	-3,4%	-6,6%
	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total active customers	73,568	74,018	74,751	75,086	74,861
- as a % of total customers	97,1%	97,4%	97,3%	97,3%	97,2%
- Quarterly Net Adds	0,084	0,451	0,733	0,335	-0,226
- Year on year net growth (in %)	1,3%	1,9%	2,3%	2,2%	1,8%

Number of national SIM cards (MtoM cards excluded)

in millions



Mobile penetration rate in France (MtoM cards excluded)



II. METROPOLITAN REPORT

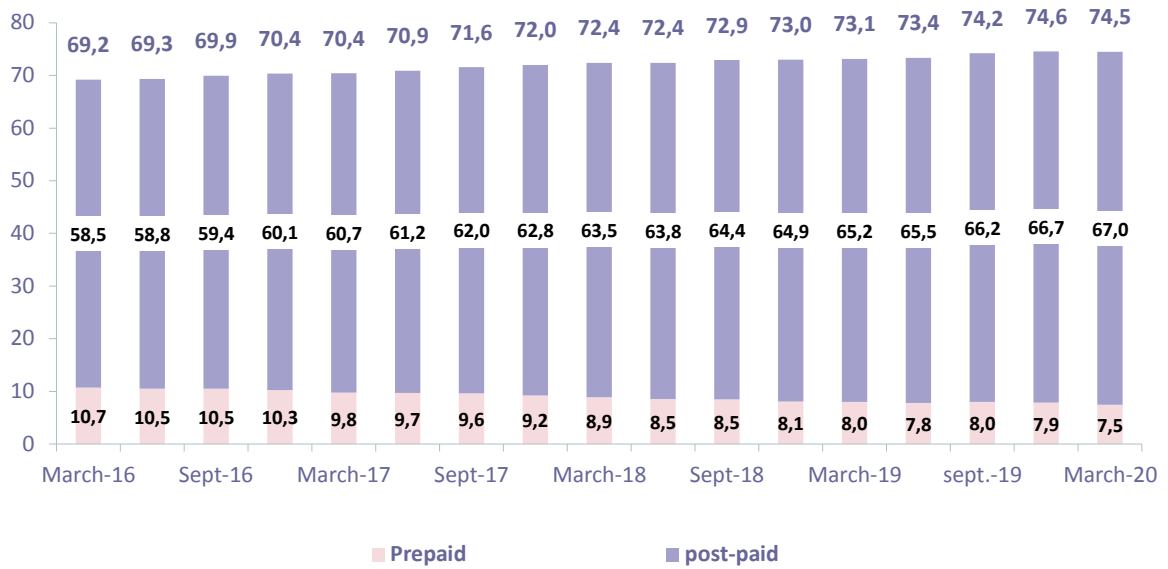
II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	73,145	73,350	74,189	74,569	74,460
among which Internet SIM cards	3,281	3,290	3,296	3,285	3,333
- Quarterly Net Adds	0,123	0,205	0,839	0,380	-0,110
- Year on year net growth (in %)	1,1%	1,4%	1,8%	2,1%	1,8%
Penetration Rate	112,8%	113,2%	114,5%	115,0%	114,7%
Population at January the 1st of previous year (source: Insee)	64,822				64,898
Postpaid customers	65,175	65,545	66,158	66,706	66,975
among which Internet SIM cards	2,842	2,852	2,849	2,840	2,855
- Quarterly gross sales	2,989	2,781	3,160	3,258	2,640
- Quarterly Net Adds	0,252	0,370	0,613	0,548	0,269
- Year on year net growth (in %)	2,7%	2,7%	2,7%	2,7%	2,8%
Prepaid customers	7,970	7,805	8,031	7,863	7,484
among which Internet SIM cards	0,439	0,438	0,447	0,445	0,478
- Quarterly gross sales	1,930	2,091	2,379	2,193	1,836
- Quarterly Net Adds	-0,129	-0,165	0,226	-0,169	-0,379
- Year on year net growth (in %)	-10,4%	-8,6%	-5,2%	-2,9%	-6,1%
Total active customers	71,222	71,671	72,399	72,711	72,514
- as a % of total customers	97,4%	97,7%	97,6%	97,5%	97,4%
- Quarterly Net Adds	0,080	0,449	0,728	0,312	-0,197
- Year on year net growth (in %)	1,4%	2,0%	2,3%	2,2%	1,8%

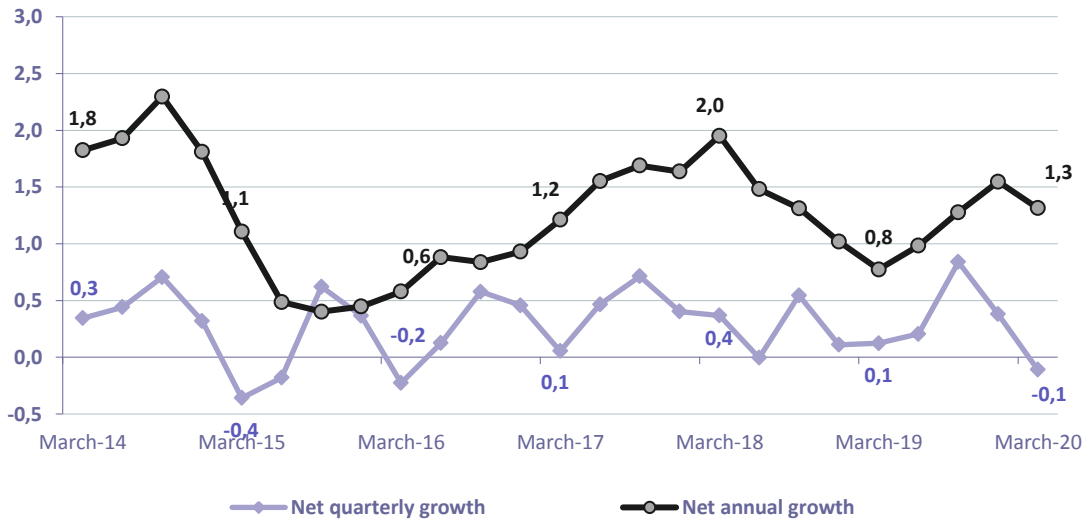
Number of metropolitan SIM cards

in millions



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

in millions



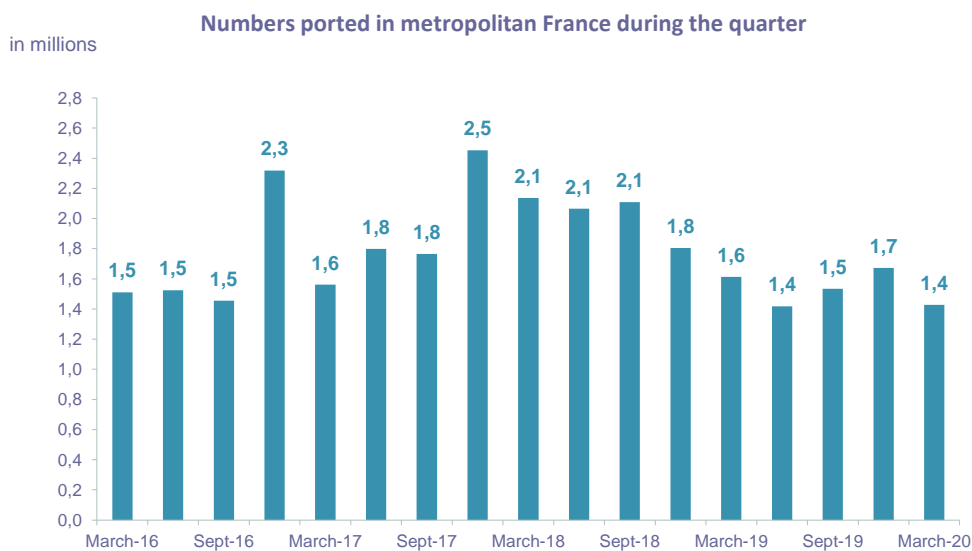
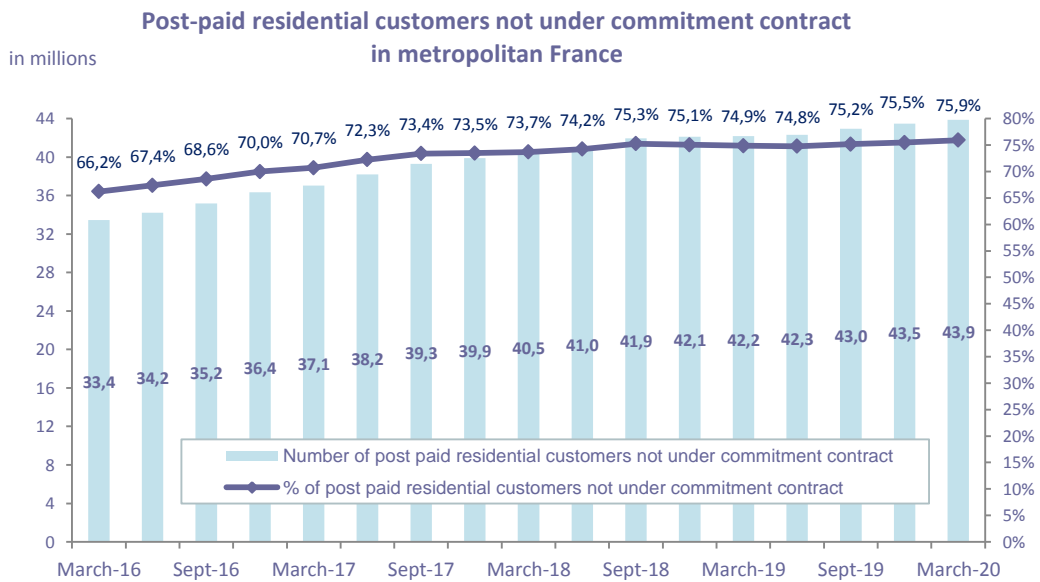
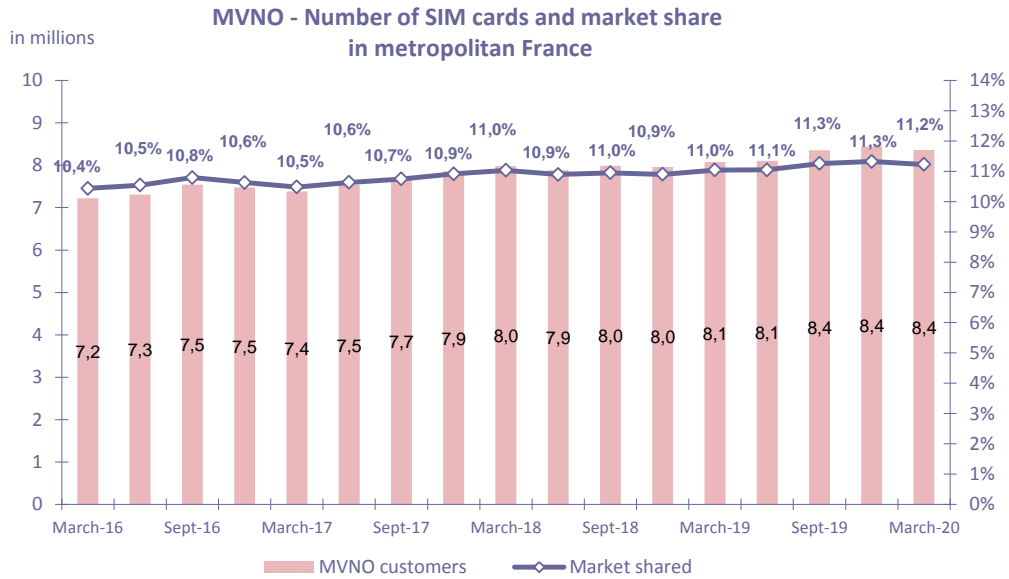
II.2 Virtual mobile network operators (MVNO) market share



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Mobile networks operators (MNOs) customers	65,068	65,245	65,837	66,125	66,098
- Among which postpaid customers	61,089	61,319	61,868	62,286	62,466
- Quarterly Net Adds	0,006	0,176	0,592	0,288	-0,027
- Year on year net growth (in %)	1,1%	1,2%	1,4%	1,6%	1,6%
MVNOs customers	8,077	8,106	8,353	8,444	8,362
- Quarterly Net Adds	4,086	4,225	4,290	4,420	4,509
- Year on year net growth (in %)	0,117	0,029	0,247	0,092	-0,083
- Year on year net growth (in %)	1,2%	2,8%	4,6%	6,1%	3,5%
MVNO Market share	11,0%	11,1%	11,3%	11,3%	11,2%
MVNO Market share of gross postpaid sales	9,7%	13,3%	8,8%	11,6%	11,8%
MVNO Market share of gross prepaid sales	66,3%	65,6%	63,7%	64,3%	63,2%

II.3 Market fluidity

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Quarterly postpaid cancellation rate	4,2%	3,7%	3,9%	4,1%	3,5%
Quarterly prepaid cancellation rate	25,6%	28,6%	27,1%	29,7%	28,8%
Numbers ported during the quarter	1,614	1,417	1,535	1,673	1,427
- Year on year net growth (in %)	-24,5%	-31,4%	-27,2%	-7,3%	-11,6%
Post-paid residential customers not under commitment	42,168	42,311	42,957	43,480	43,861
- % of customers not under commitment contract	74,9%	74,8%	75,2%	75,5%	75,9%
Post-paid customers not under commitment contract	45,722	45,867	46,549	47,109	47,464
- % of customers not under commitment contract	70,2%	70,0%	70,4%	70,6%	70,9%



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET



III.1 Residential market - Total customers segmentation

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total residential customers	64,292	64,395	65,175	65,464	65,259
- Quarterly Net Adds	2,006	1,985	1,982	1,960	1,986
- Quarterly Net Adds	0,074	0,103	0,780	0,289	-0,204
- Year on year net growth (in %)	0,8%	1,0%	1,5%	1,9%	1,5%
Postpaid residential customers	56,322	56,589	57,143	57,601	57,775
- Quarterly gross sales	2,539	2,347	2,822	2,825	2,239
- Quarterly Net Adds	0,203	0,268	0,554	0,458	0,174
- Year on year net growth (in %)	2,6%	2,5%	2,6%	2,6%	2,6%
Prepaid residential customers	7,970	7,805	8,031	7,863	7,484
- Quarterly gross sales	1,930	2,091	2,379	2,193	1,836
- Quarterly Net Adds	-0,129	-0,165	0,226	-0,169	-0,379
- Year on year net growth (in %)	-10,4%	-8,6%	-5,2%	-2,9%	-6,1%

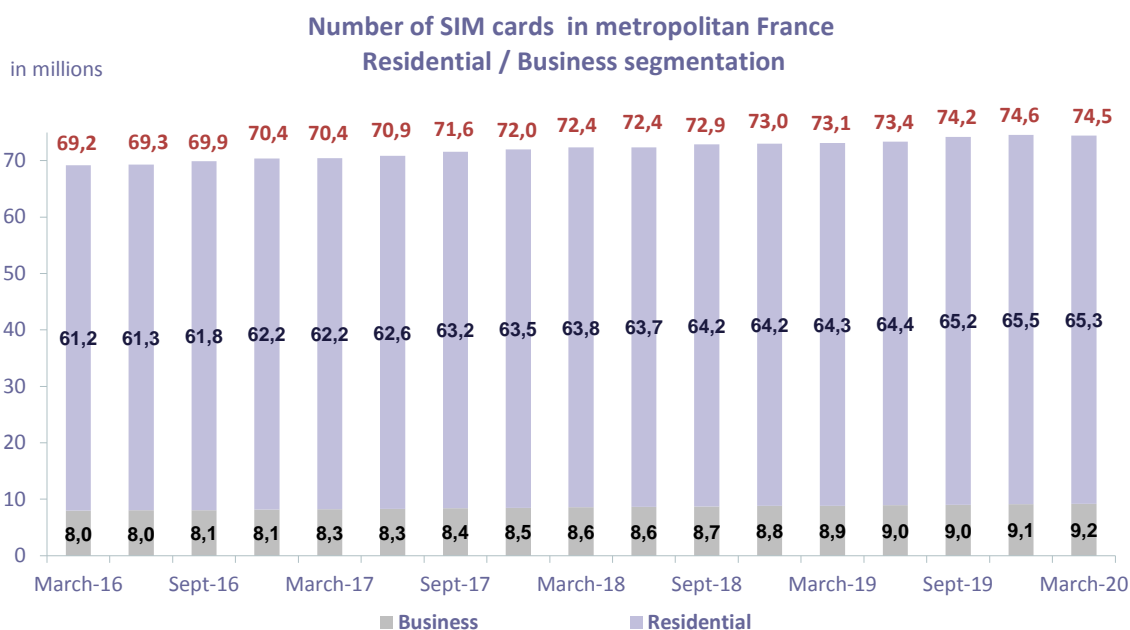
III.2 Residential market - Mobile Virtual Network Operators market share

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
MNOs	56,655	56,745	57,291	57,501	57,391
- Quarterly Net Adds	-0,034	0,090	0,546	0,210	-0,110
- Year on year net growth (in %)	0,8%	0,9%	1,2%	1,4%	1,3%
MVNOs	7,637	7,650	7,884	7,963	7,868
- Quarterly Net Adds	0,108	0,013	0,234	0,079	-0,094
- Year on year net growth (in %)	0,7%	2,4%	4,3%	5,8%	3,0%
MVNO Market share	11,9%	11,9%	12,1%	12,2%	12,1%
MVNO Market share of gross postpaid sales	9,9%	14,1%	8,8%	12,3%	12,4%

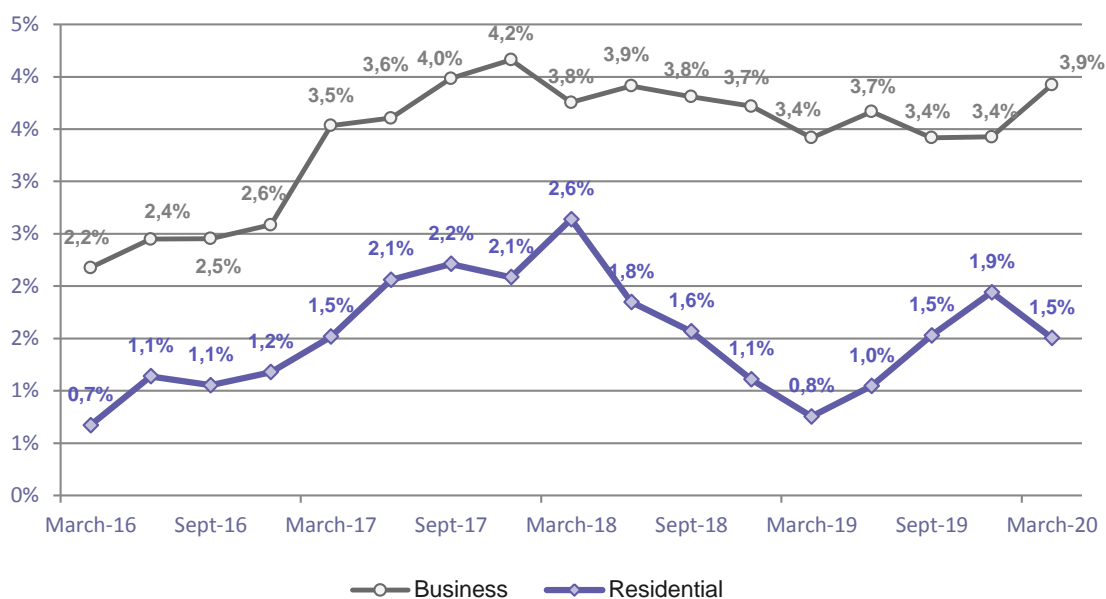
III.3 Business market - total customers MtoM SIM cards excluded

Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
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Postpaid business customers	8,853	8,955	9,015	9,106	9,200
among which Internet SIM cards	1,275	1,305	1,314	1,325	1,347
- Quarterly Net Adds	0,049	0,102	0,060	0,091	0,095
- Year on year net growth (in %)	3,4%	3,7%	3,4%	3,4%	3,9%



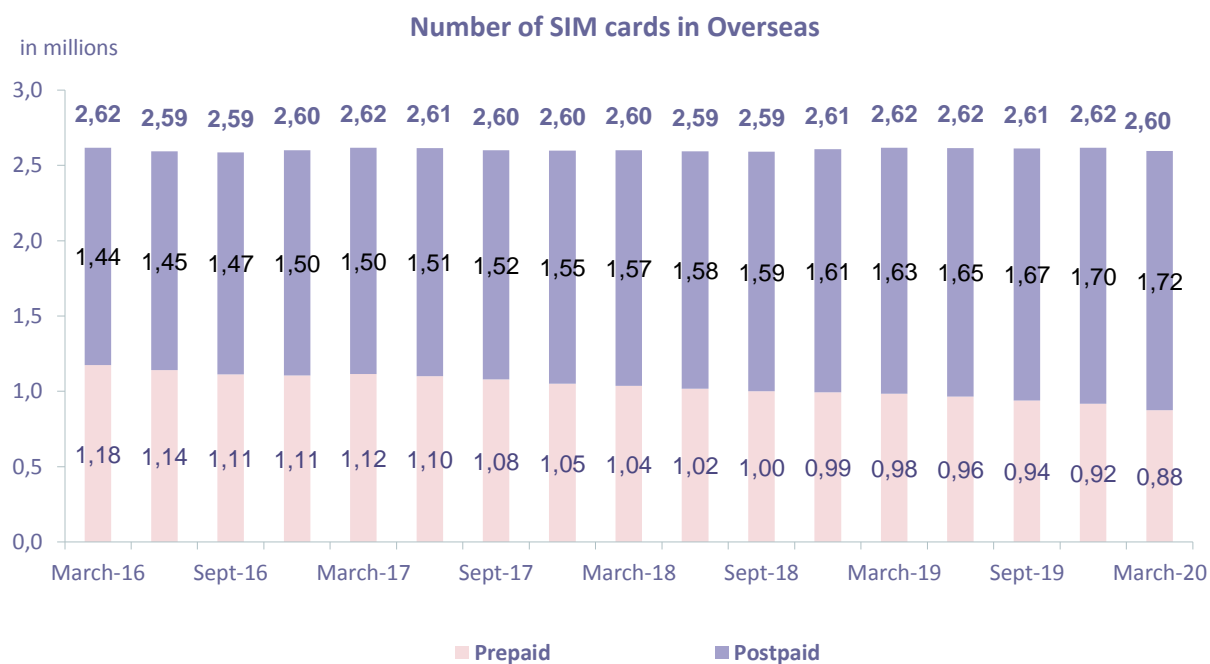
Year on year net growth of residential and business SIM cards



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

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

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	2,617	2,615	2,614	2,618	2,596
- Quarterly Net Adds	0,010	-0,002	-0,001	0,004	-0,021
- Year on year net growth (in %)	0,6%	0,8%	0,9%	0,4%	-0,8%
Penetration Rate	118,5%	118,4%	118,4%	118,5%	117,1%
Population at January the 1st of previous year (source: Insee)	2,208				2,217
Postpaid customers	1,633	1,650	1,674	1,701	1,720
- Quarterly Net Adds	0,019	0,017	0,024	0,026	0,020
- Year on year net growth (in %)	4,3%	4,7%	5,2%	5,3%	5,3%
Prepaid customers	0,984	0,965	0,940	0,917	0,876
- Quarterly Net Adds	-0,009	-0,019	-0,025	-0,023	-0,041
- Year on year net growth (in %)	-5,1%	-5,2%	-6,0%	-7,6%	-11,0%
Total active customers	2,346	2,348	2,352	2,375	2,347
- as a % of total customers	89,6%	89,8%	90,0%	90,7%	90,4%
- Quarterly Net Adds	0,004	0,002	0,005	0,023	-0,028
- Year on year net growth (in %)	-0,6%	0,3%	1,1%	1,4%	0,0%



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



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	0,626	0,628	0,624	0,623	0,618
- Quarterly Net Adds	0,007	0,003	-0,004	0,000	-0,006
- Year on year net growth (in %)	-0,8%	1,1%	0,7%	0,9%	-1,3%
Penetration Rate	146,2%	146,9%	145,9%	145,8%	146,2%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,428				0,422
Postpaid customers	0,363	0,365	0,367	0,371	0,376
- Quarterly Net Adds	0,004	0,002	0,002	0,005	0,004
- Year on year net growth (in %)	2,9%	3,1%	3,2%	3,4%	3,6%
Prepaid customers	0,263	0,263	0,257	0,252	0,242
- Quarterly Net Adds	0,004	0,000	-0,006	-0,005	-0,010
- Year on year net growth (in %)	-5,5%	-1,6%	-2,6%	-2,6%	-8,0%
Total active customers	0,538	0,539	0,534	0,538	0,528
- as a % of total customers	86,0%	85,9%	85,6%	86,3%	85,5%
- Quarterly Net Adds	0,001	0,001	-0,005	0,004	-0,010
- Year on year net growth (in %)	-3,5%	-1,4%	-0,2%	0,2%	-1,8%

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



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	0,301	0,303	0,299	0,298	0,293
- Quarterly Net Adds	0,004	0,002	-0,004	-0,001	-0,004
- Year on year net growth (in %)	2,6%	1,8%	1,2%	0,1%	-2,6%
Penetration Rate	106,2%	106,8%	105,3%	104,9%	100,9%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,284				0,291
Postpaid customers	0,130	0,131	0,133	0,136	0,139
- Quarterly Net Adds	0,002	0,001	0,002	0,003	0,003
- Year on year net growth (in %)	5,3%	5,0%	6,2%	6,1%	7,0%
Prepaid customers	0,171	0,171	0,166	0,161	0,154
- Quarterly Net Adds	0,002	0,000	-0,006	-0,004	-0,007
- Year on year net growth (in %)	0,6%	-0,5%	-2,4%	-4,4%	-9,9%
Total active customers	0,260	0,261	0,260	0,262	0,256
- as a % of total customers	86,3%	86,2%	86,9%	88,2%	87,3%
- Quarterly Net Adds	-0,001	0,001	-0,001	0,003	-0,006
- Year on year net growth (in %)	0,2%	0,2%	0,6%	0,6%	-1,5%

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



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	0,531	0,533	0,533	0,530	0,523
- Quarterly Net Adds	0,002	0,002	-0,001	-0,003	-0,006
- Year on year net growth (in %)	0,8%	1,2%	1,2%	0,0%	-1,5%
Penetration Rate	146,2%	146,7%	146,6%	145,7%	145,9%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,363				0,359
Postpaid customers	0,332	0,334	0,336	0,339	0,341
- Quarterly Net Adds	0,004	0,002	0,002	0,003	0,003
- Year on year net growth (in %)	2,5%	2,6%	3,2%	3,1%	2,7%
Prepaid customers	0,199	0,199	0,197	0,191	0,182
- Quarterly Net Adds	-0,002	0,000	-0,002	-0,006	-0,009
- Year on year net growth (in %)	-1,7%	-1,1%	-2,1%	-5,1%	-8,6%
Total active customers	0,448	0,449	0,446	0,447	0,441
- as a % of total customers	84,4%	84,1%	83,7%	84,5%	84,2%
- Quarterly Net Adds	0,003	0,000	-0,003	0,001	-0,007
- Year on year net growth (in %)	-2,3%	-0,9%	0,3%	0,4%	-1,7%

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



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	0,287	0,277	0,276	0,277	0,271
- Quarterly Net Adds	-0,005	-0,009	-0,001	0,001	-0,007
- Year on year net growth (in %)	2,5%	-1,2%	-2,4%	-4,9%	-5,5%
Penetration Rate	106,3%	102,9%	102,4%	102,9%	96,9%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,269				0,279
Postpaid customers	0,066	0,065	0,066	0,067	0,068
- Quarterly Net Adds	0,000	0,000	0,001	0,002	0,000
- Year on year net growth (in %)	-0,1%	-0,1%	1,1%	2,9%	3,3%
Prepaid customers	0,221	0,212	0,210	0,210	0,203
- Quarterly Net Adds	-0,005	-0,009	-0,002	0,000	-0,007
- Year on year net growth (in %)	3,3%	-1,6%	-3,4%	-7,2%	-8,1%
Total active customers	0,250	0,246	0,249	0,254	0,249
- as a % of total customers	87,2%	88,6%	90,3%	91,4%	92,0%
- Quarterly Net Adds	-0,002	-0,004	0,004	0,004	-0,004
- Year on year net growth (in %)	3,4%	1,7%	0,9%	0,6%	-0,2%

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



	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
Total customers	0,867	0,868	0,877	0,885	0,886
- Quarterly Net Adds	0,001	0,001	0,009	0,007	0,001
- Year on year net growth (in %)	0,1%	0,8%	1,8%	2,2%	2,1%
Penetration Rate	101,1%	101,2%	102,3%	103,1%	103,0%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,858				0,860
Postpaid customers	0,738	0,750	0,767	0,782	0,791
- Quarterly Net Adds	0,010	0,012	0,017	0,014	0,009
- Year on year net growth (in %)	6,2%	6,9%	7,3%	7,4%	7,2%
Prepaid customers	0,130	0,119	0,110	0,103	0,095
- Quarterly Net Adds	-0,008	-0,011	-0,009	-0,007	-0,008
- Year on year net growth (in %)	-24,6%	-26,0%	-25,4%	-25,5%	-27,0%
Total active customers	0,845	0,847	0,858	0,868	0,867
- as a % of total customers	97,4%	97,6%	97,8%	98,2%	97,9%
- Quarterly Net Adds	0,003	0,003	0,010	0,011	-0,001
- Year on year net growth (in %)	1,0%	1,7%	2,5%	3,2%	2,7%

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

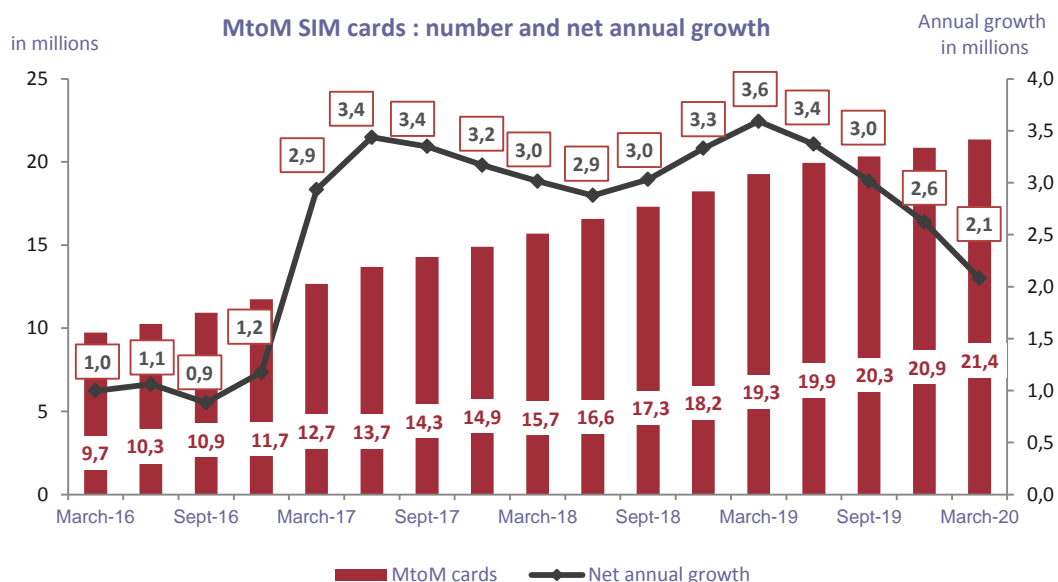
	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
MtoM SIM cards	19,283	19,940	20,327	20,862	21,362
-Gross sales for the quarter	1,161	0,808	0,646	0,752	0,727
- Quarterly Net Adds	1,045	0,657	0,387	0,535	0,500
- Year on year net growth (in %)	22,9%	20,3%	17,4%	14,4%	10,8%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
MtoM SIM cards	19,247	19,904	20,293	20,827	21,327
- Quarterly Net Adds	1,045	0,656	0,389	0,534	0,500
- Year on year net growth (in %)	22,9%	20,4%	17,4%	14,4%	10,8%

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	Mar-19	Jun-19	Sept-19	Dec-19	Mar-20
MtoM SIM cards	0,035	0,036	0,034	0,035	0,035
- Quarterly Net Adds	0,001	0,000	-0,002	0,000	0,000
- Year on year net growth (in %)	9,8%	8,1%	2,3%	-0,4%	-2,1%



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 2020, comes from estimates published in January 2020 (and therefore of the population for January 1st, 2019).

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.