



autorité de régulation
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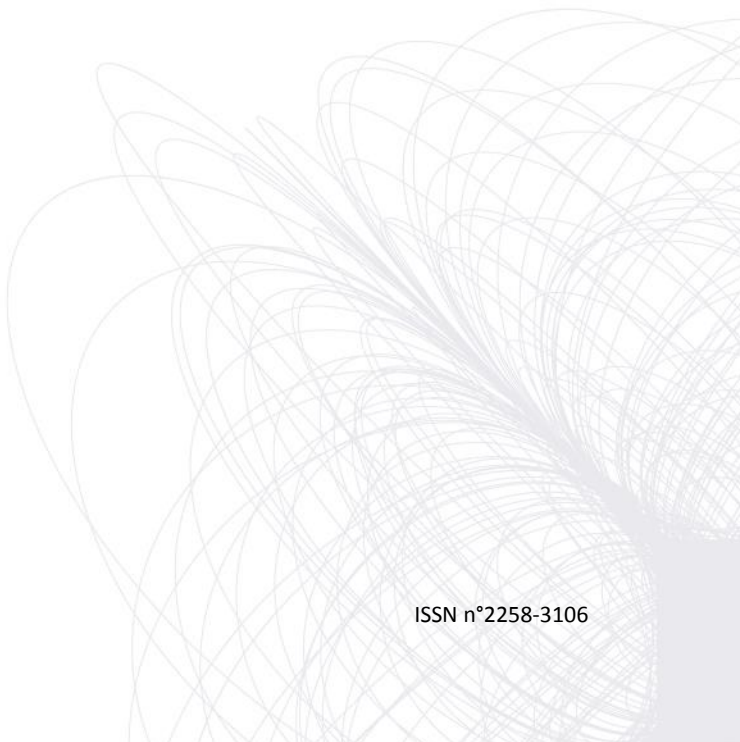
RÉPUBLIQUE FRANÇAISE

MOBILES SERVICES

2ND QUARTER 2020

ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

July 30, 2020

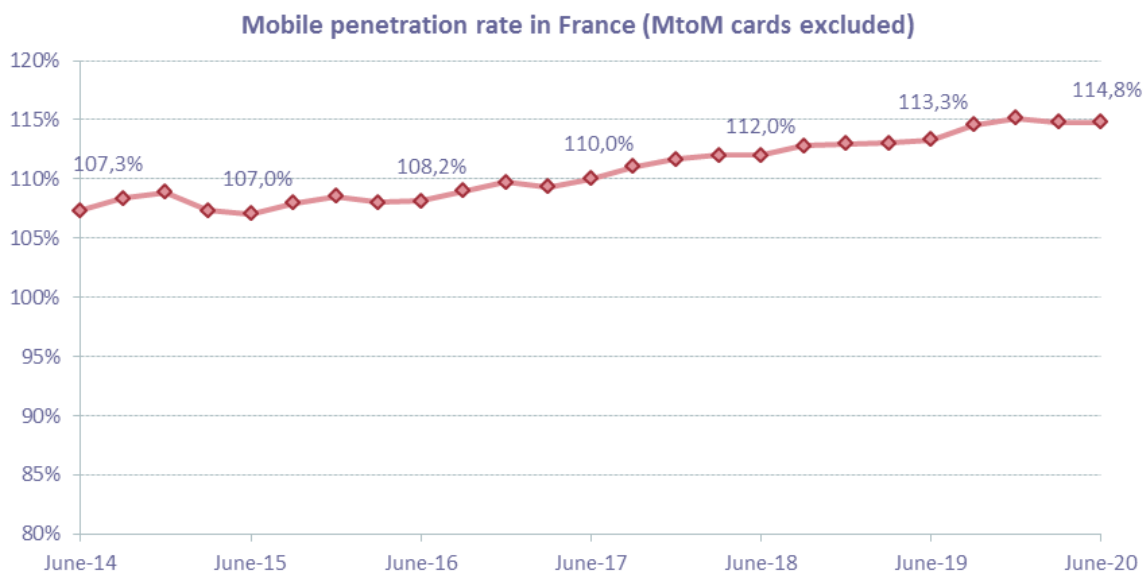
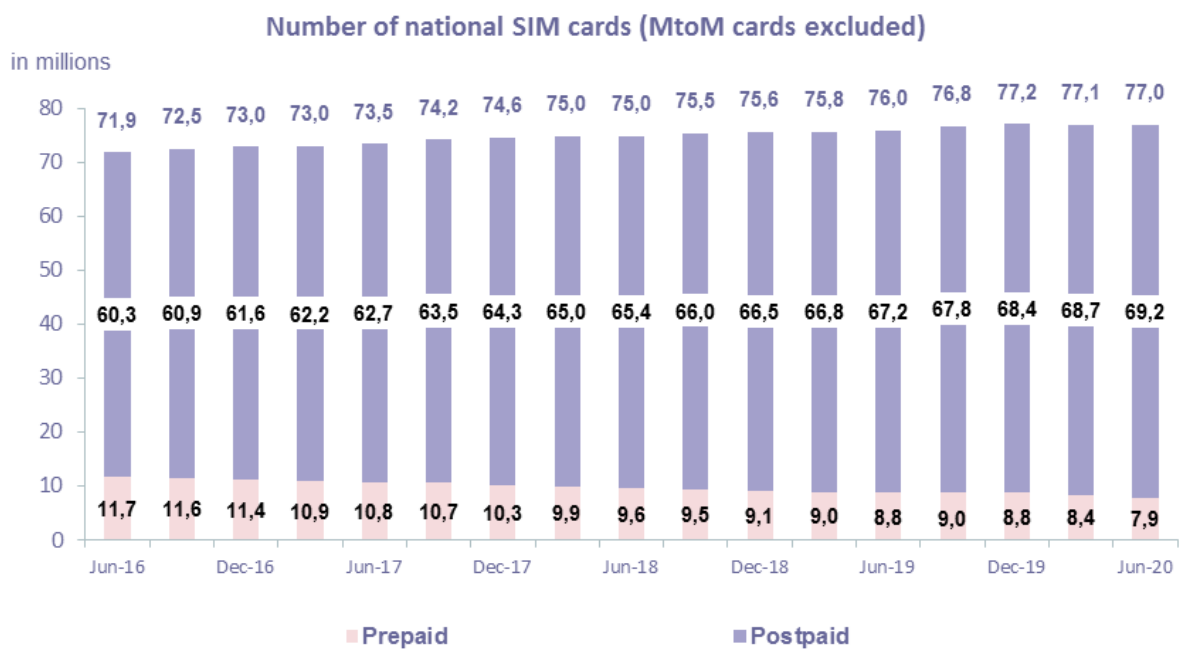
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The quarterly figures relating to the sales turnover and traffic are published three months after the end of the quarter within the [telecommunications observatory in France](#). Except opposite mention, indicators are in millions of units



II. METROPOLITAN REPORT

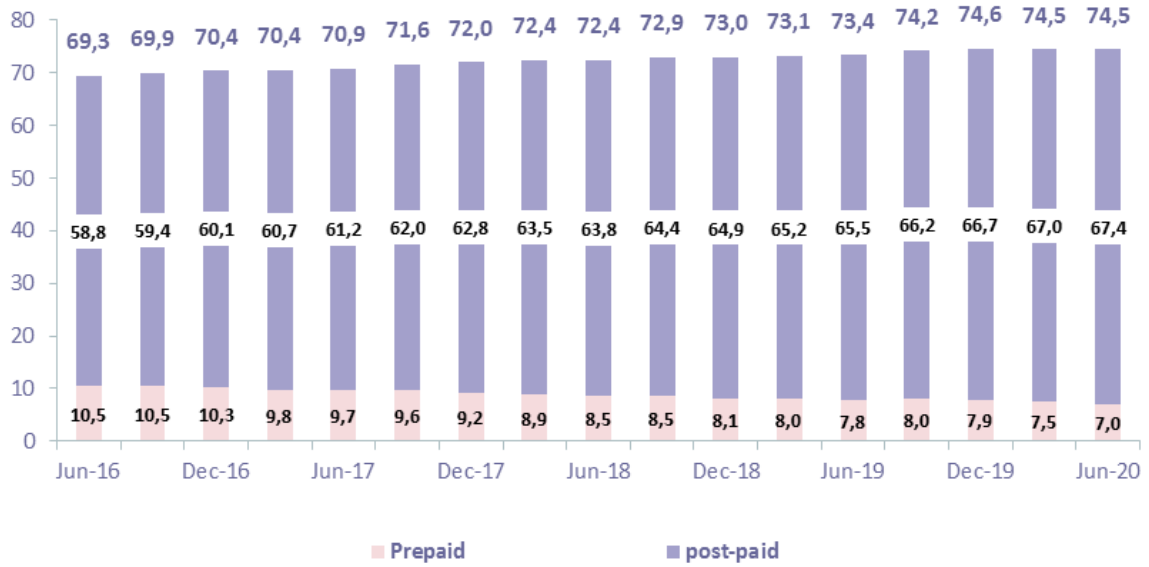
II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	73,350	74,189	74,567	74,459	74,453
among which Internet SIM cards	3,292	3,296	3,285	3,333	3,316
- Quarterly Net Adds	0,205	0,839	0,378	-0,108	-0,007
- Year on year net growth (in %)	1,4%	1,8%	2,1%	1,8%	1,5%
Penetration Rate	113,2%	114,5%	115,0%	114,7%	114,7%
Population at January the 1st of previous year (source: Insee)	64,822			64,898	
Postpaid customers	65,545	66,158	66,704	66,975	67,432
among which Internet SIM cards	2,852	2,849	2,840	2,855	2,886
- Quarterly gross sales	2,781	3,160	3,258	2,640	2,333
- Quarterly Net Adds	0,370	0,613	0,546	0,271	0,457
- Year on year net growth (in %)	2,7%	2,7%	2,7%	2,8%	2,9%
	-0,17826	-0,14202	-0,05338	-0,11692	-0,16088
Prepaid customers	7,805	8,031	7,863	7,484	7,021
among which Internet SIM cards	0,440	0,447	0,445	0,478	0,430
- Quarterly gross sales	2,091	2,379	2,193	1,836	1,270
- Quarterly Net Adds	-0,165	0,226	-0,169	-0,379	-0,464
- Year on year net growth (in %)	-8,6%	-5,2%	-2,9%	-6,1%	-10,1%
	0,065	0,108	0,091	- 0,049	- 0,393
Total active customers	71,671	72,399	72,709	72,514	72,382
- as a % of total customers	97,7%	97,6%	97,5%	97,4%	97,2%
- Quarterly Net Adds	0,449	0,728	0,310	-0,195	-0,132
- Year on year net growth (in %)	2,0%	2,3%	2,2%	1,8%	1,0%
Adjusted figure					

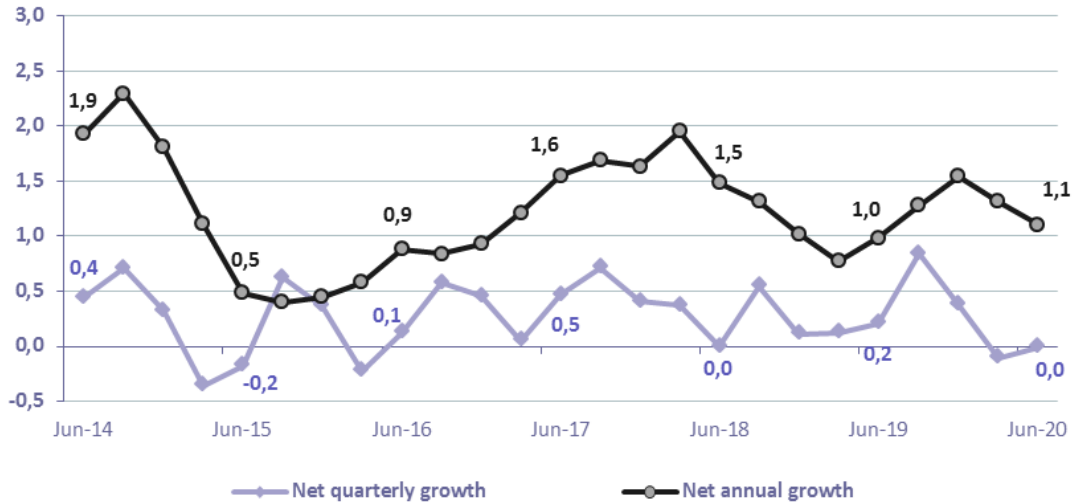
Number of metropolitan SIM cards

in millions



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

in millions



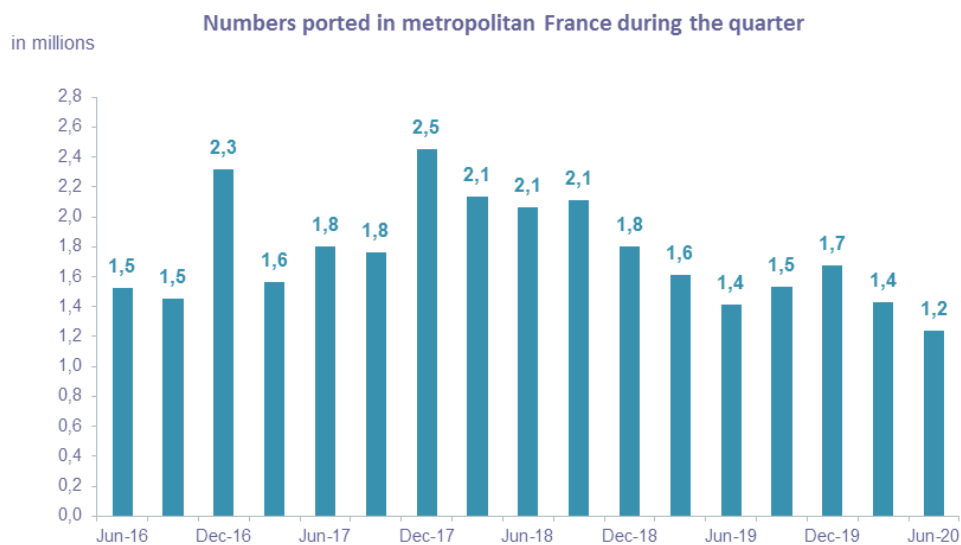
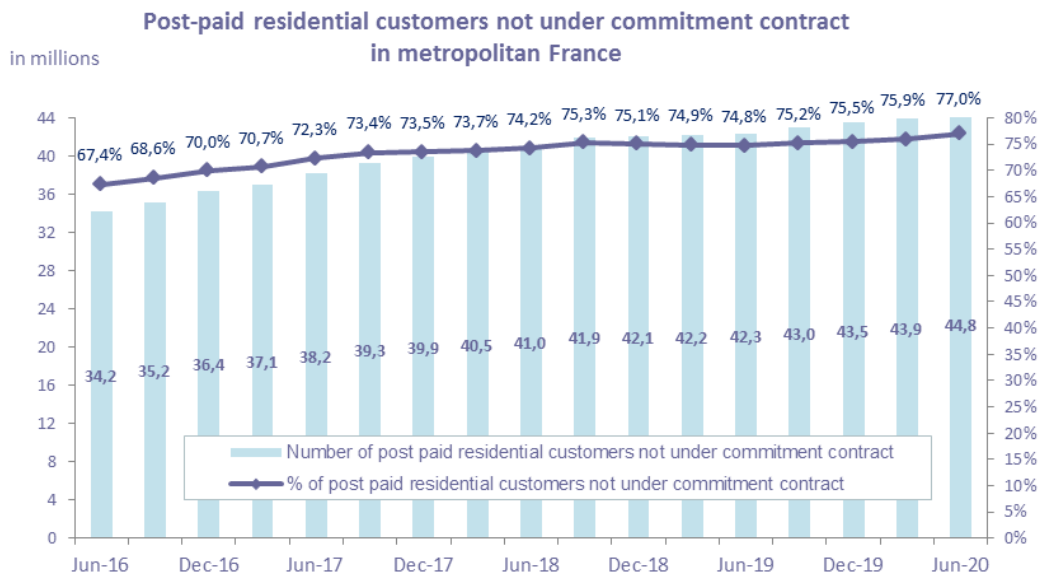
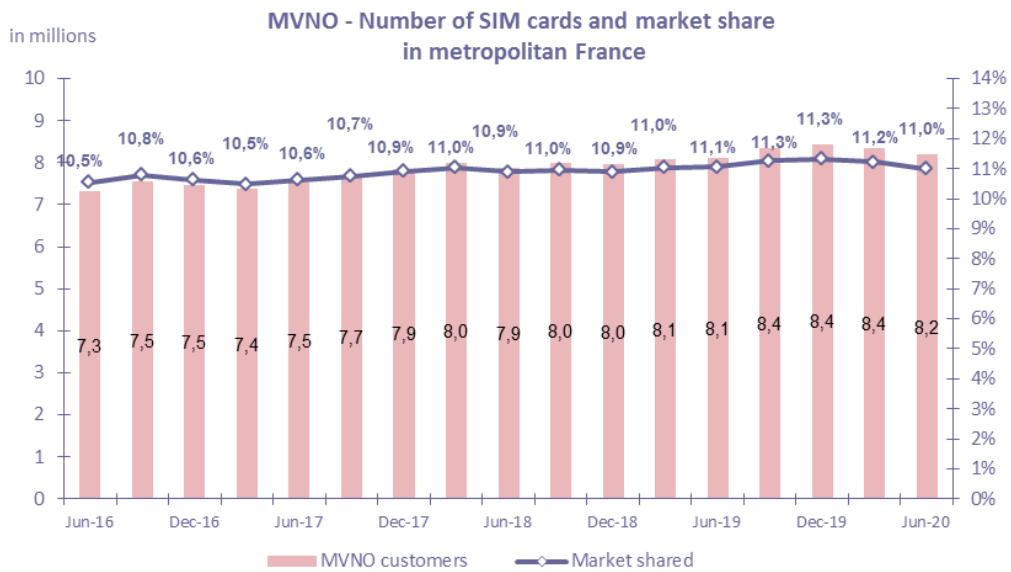
II.2 Virtual mobile network operators (MVNO) market share



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Mobile networks operators (MNOs) customers	65,245	65,837	66,125	66,098	66,261
- Among which postpaid customers	61,319	61,868	62,286	62,466	62,884
- Quarterly Net Adds	0,176	0,592	0,288	-0,027	0,163
- Year on year net growth (in %)	1,2%	1,4%	1,6%	1,6%	1,6%
MVNOs customers	8,106	8,353	8,442	8,362	8,192
- Quarterly Net Adds	4,225	4,290	4,418	4,509	4,549
- Year on year net growth (in %)	0,029	0,247	0,090	-0,081	-0,169
- Year on year net growth (in %)	2,8%	4,6%	6,1%	3,5%	1,1%
MVNO Market share	11,1%	11,3%	11,3%	11,2%	11,0%
MVNO Market share of gross postpaid sales	13,3%	8,8%	11,6%	11,8%	8,9%
MVNO Market share of gross prepaid sales	65,6%	63,7%	64,3%	63,2%	62,7%

II.3 Market fluidity

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Quarterly postpaid cancellation rate	3,7%	3,9%	4,1%	3,5%	2,8%
Quarterly prepaid cancellation rate	28,6%	27,1%	29,7%	28,8%	23,9%
Numbers ported during the quarter	1,417	1,535	1,673	1,427	1,236
- Year on year net growth (in %)	-31,4%	-27,2%	-7,3%	-11,6%	-12,7%
Post-paid residential customers not under commitment	42,311	42,957	43,480	43,861	44,759
- % of customers not under commitment contract	74,8%	75,2%	75,5%	75,9%	77,0%
Post-paid customers not under commitment contract	45,867	46,549	47,109	47,464	48,498
- % of customers not under commitment contract	70,0%	70,4%	70,6%	70,9%	71,9%



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET



III.1 Residential market - Total customers segmentation

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total residential customers	64,395	65,175	65,464	65,259	65,125
- Quarterly Net Adds	1,987	1,982	1,960	1,986	1,936
- Quarterly Net Adds	0,103	0,780	0,289	-0,204	-0,134
- Year on year net growth (in %)	1,0%	1,5%	1,9%	1,5%	1,1%
Postpaid residential customers	56,589	57,143	57,601	57,775	58,105
- Quarterly gross sales	2,347	2,822	2,825	2,239	2,009
- Quarterly Net Adds	0,268	0,554	0,458	0,174	0,330
- Year on year net growth (in %)	2,5%	2,6%	2,6%	2,6%	2,7%
Prepaid residential customers	7,805	8,031	7,863	7,484	7,021
- Quarterly gross sales	2,091	2,379	2,193	1,836	1,270
- Quarterly Net Adds	-0,165	0,226	-0,169	-0,379	-0,464
- Year on year net growth (in %)	-8,6%	-5,2%	-2,9%	-6,1%	-10,1%

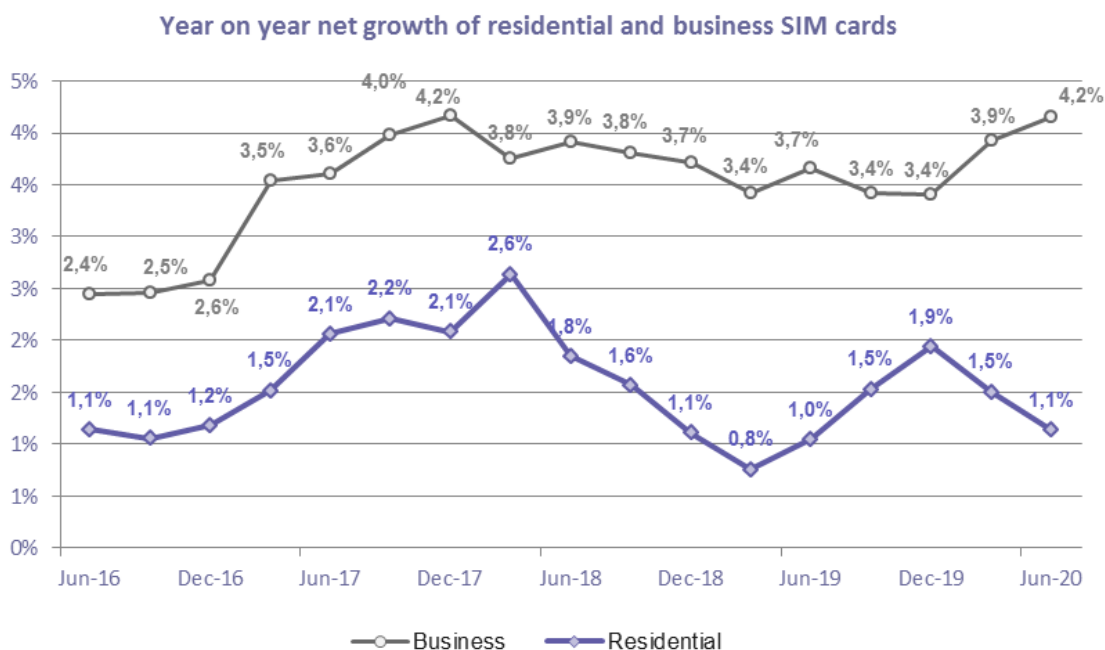
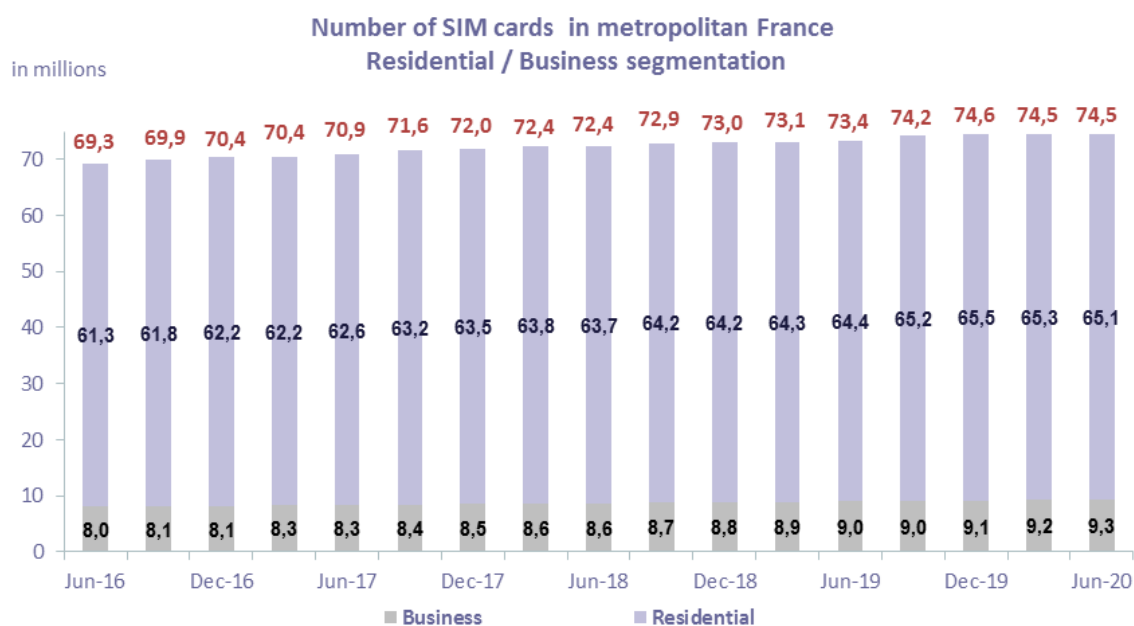
III.2 Residential market - Mobile Virtual Network Operators market share

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
MNOs	56,745	57,291	57,501	57,391	57,441
- Quarterly Net Adds	0,090	0,546	0,210	-0,110	0,050
- Year on year net growth (in %)	0,9%	1,2%	1,4%	1,3%	1,2%
MVNOs	7,650	7,884	7,963	7,868	7,684
- Quarterly Net Adds	0,013	0,234	0,079	-0,094	-0,184
- Year on year net growth (in %)	2,4%	4,3%	5,8%	3,0%	0,5%
MVNO Market share	11,9%	12,1%	12,2%	12,1%	11,8%
MVNO Market share of gross postpaid sales	14,1%	8,8%	12,3%	12,4%	9,0%

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

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
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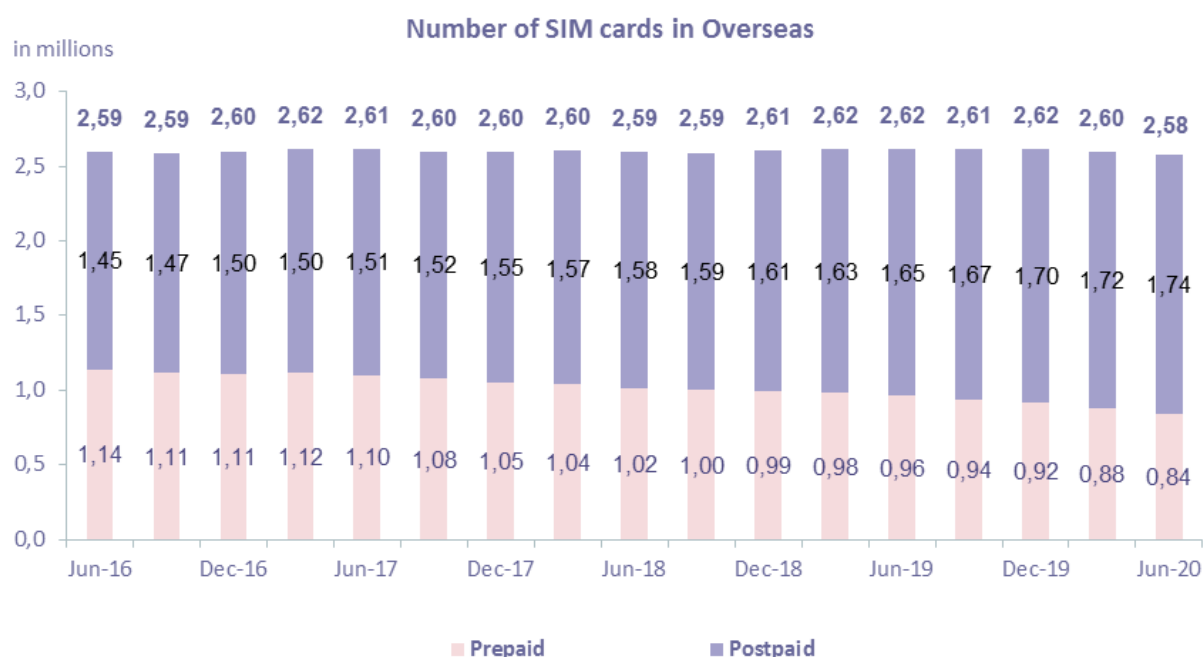
Postpaid business customers	8,955	9,015	9,104	9,200	9,327
among which Internet SIM cards	1,305	1,314	1,325	1,347	1,380
- Quarterly Net Adds	0,102	0,060	0,089	0,097	0,127
- Year on year net growth (in %)	3,7%	3,4%	3,4%	3,9%	4,2%



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

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

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	2,615	2,614	2,618	2,596	2,577
- Quarterly Net Adds	-0,002	-0,001	0,004	-0,021	-0,019
- Year on year net growth (in %)	0,8%	0,9%	0,4%	-0,8%	-1,4%
Penetration Rate	118,4%	118,4%	118,5%	117,1%	116,2%
Population at January the 1st of previous year (source: Insee)	2,208			2,217	
Postpaid customers	1,650	1,674	1,701	1,720	1,738
- Quarterly Net Adds	0,017	0,024	0,026	0,020	0,018
- Year on year net growth (in %)	4,7%	5,2%	5,3%	5,3%	5,3%
Prepaid customers	0,965	0,940	0,917	0,876	0,840
- Quarterly Net Adds	-0,019	-0,025	-0,023	-0,041	-0,036
- Year on year net growth (in %)	-5,2%	-6,0%	-7,6%	-11,0%	-13,0%
Total active customers	2,348	2,352	2,375	2,347	2,344
- as a % of total customers	89,8%	90,0%	90,7%	90,4%	90,9%
- Quarterly Net Adds	0,002	0,005	0,023	-0,028	-0,003
- Year on year net growth (in %)	0,3%	1,1%	1,4%	0,0%	-0,1%



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



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	0,628	0,624	0,623	0,618	0,613
- Quarterly Net Adds	0,003	-0,004	0,000	-0,006	-0,004
- Year on year net growth (in %)	1,1%	0,7%	0,9%	-1,3%	-2,4%
Penetration Rate	146,9%	145,9%	145,8%	146,2%	145,2%
Population at January the 1st of previous year (source: Insee)	0,428			0,422	
Postpaid customers	0,365	0,367	0,371	0,376	0,381
- Quarterly Net Adds	0,002	0,002	0,005	0,004	0,005
- Year on year net growth (in %)	3,1%	3,2%	3,4%	3,6%	4,3%
Prepaid customers	0,263	0,257	0,252	0,242	0,233
- Quarterly Net Adds	0,000	-0,006	-0,005	-0,010	-0,009
- Year on year net growth (in %)	-1,6%	-2,6%	-2,6%	-8,0%	-11,6%
Total active customers	0,539	0,534	0,538	0,528	0,532
- as a % of total customers	85,9%	85,6%	86,3%	85,5%	86,7%
- Quarterly Net Adds	0,001	-0,005	0,004	-0,010	0,004
- Year on year net growth (in %)	-1,4%	-0,2%	0,2%	-1,8%	-1,5%

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



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	0,303	0,299	0,298	0,293	0,290
- Quarterly Net Adds	0,002	-0,004	-0,001	-0,004	-0,004
- Year on year net growth (in %)	1,8%	1,2%	0,1%	-2,6%	-4,3%
Penetration Rate	106,8%	105,3%	104,9%	100,9%	99,6%
Population at January the 1st of previous year (source: Insee)	0,284			0,291	
Postpaid customers	0,131	0,133	0,136	0,139	0,143
- Quarterly Net Adds	0,001	0,002	0,003	0,003	0,004
- Year on year net growth (in %)	5,0%	6,2%	6,1%	7,0%	9,2%
Prepaid customers	0,171	0,166	0,161	0,154	0,146
- Quarterly Net Adds	0,000	-0,006	-0,004	-0,007	-0,008
- Year on year net growth (in %)	-0,5%	-2,4%	-4,4%	-9,9%	-14,7%
Total active customers	0,261	0,260	0,262	0,256	0,255
- as a % of total customers	86,2%	86,9%	88,2%	87,3%	88,1%
- Quarterly Net Adds	0,001	-0,001	0,003	-0,006	-0,001
- Year on year net growth (in %)	0,2%	0,6%	0,6%	-1,5%	-2,2%

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



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	0,533	0,533	0,530	0,523	0,524
- Quarterly Net Adds	0,002	-0,001	-0,003	-0,006	0,001
- Year on year net growth (in %)	1,2%	1,2%	0,0%	-1,5%	-1,7%
Penetration Rate	146,7%	146,6%	145,7%	145,9%	146,1%
Population at January the 1st of previous year (source: Insee)	0,363			0,359	
Postpaid customers	0,334	0,336	0,339	0,341	0,344
- Quarterly Net Adds	0,002	0,002	0,003	0,003	0,002
- Year on year net growth (in %)	2,6%	3,2%	3,1%	2,7%	2,9%
Prepaid customers	0,199	0,197	0,191	0,182	0,180
- Quarterly Net Adds	0,000	-0,002	-0,006	-0,009	-0,002
- Year on year net growth (in %)	-1,1%	-2,1%	-5,1%	-8,6%	-9,5%
Total active customers	0,449	0,446	0,447	0,441	0,446
- as a % of total customers	84,1%	83,7%	84,5%	84,2%	85,1%
- Quarterly Net Adds	0,000	-0,003	0,001	-0,007	0,006
- Year on year net growth (in %)	-0,9%	0,3%	0,4%	-1,7%	-0,6%

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



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	0,277	0,276	0,277	0,271	0,264
- Quarterly Net Adds	-0,009	-0,001	0,001	-0,007	-0,007
- Year on year net growth (in %)	-1,2%	-2,4%	-4,9%	-5,5%	-4,9%
Penetration Rate	102,9%	102,4%	102,9%	96,9%	94,4%
Population at January the 1st of previous year (source: Insee)	0,269			0,279	
Postpaid customers	0,065	0,066	0,067	0,068	0,069
- Quarterly Net Adds	0,000	0,001	0,002	0,000	0,001
- Year on year net growth (in %)	-0,1%	1,1%	2,9%	3,3%	5,7%
Prepaid customers	0,212	0,210	0,210	0,203	0,195
- Quarterly Net Adds	-0,009	-0,002	0,000	-0,007	-0,008
- Year on year net growth (in %)	-1,6%	-3,4%	-7,2%	-8,1%	-8,1%
Total active customers	0,246	0,249	0,254	0,249	0,242
- as a % of total customers	88,6%	90,3%	91,4%	92,0%	91,8%
- Quarterly Net Adds	-0,004	0,004	0,004	-0,004	-0,007
- Year on year net growth (in %)	1,7%	0,9%	0,6%	-0,2%	-1,4%

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



	Jun-19	Sept-19	Dec-19	March-20	Jun-20
Total customers	0,868	0,877	0,885	0,886	0,881
- Quarterly Net Adds	0,001	0,009	0,007	0,001	-0,004
- Year on year net growth (in %)	0,8%	1,8%	2,2%	2,1%	1,5%
Penetration Rate	101,2%	102,3%	103,1%	103,0%	102,5%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,858			0,860	
Postpaid customers	0,750	0,767	0,782	0,791	0,796
- Quarterly Net Adds	0,012	0,017	0,014	0,009	0,005
- Year on year net growth (in %)	6,9%	7,3%	7,4%	7,2%	6,1%
Prepaid customers	0,119	0,110	0,103	0,095	0,085
- Quarterly Net Adds	-0,011	-0,009	-0,007	-0,008	-0,009
- Year on year net growth (in %)	-26,0%	-25,4%	-25,5%	-27,0%	-28,0%
Total active customers	0,847	0,858	0,868	0,867	0,863
- as a % of total customers	97,6%	97,8%	98,2%	97,9%	98,0%
- Quarterly Net Adds	0,003	0,010	0,011	-0,001	-0,004
- Year on year net growth (in %)	1,7%	2,5%	3,2%	2,7%	1,9%

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

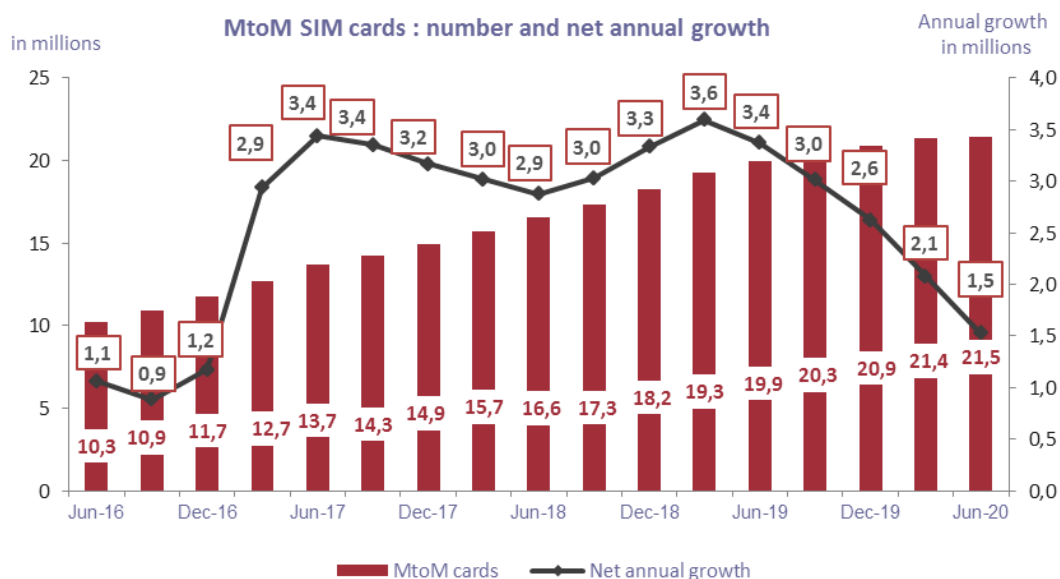
	Jun-19	Sept-19	Dec-19	March-20	Jun-20
MtoM SIM cards	19,940	20,327	20,862	21,362	21,469
-Gross sales for the quarter	0,808	0,646	0,752	0,727	0,427
- Quarterly Net Adds	0,657	0,387	0,535	0,500	0,106
- Year on year net growth (in %)	20,3%	17,4%	14,4%	10,8%	7,7%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	Jun-19	Sept-19	Dec-19	March-20	Jun-20
MtoM SIM cards	19,904	20,293	20,827	21,327	21,434
- Quarterly Net Adds	0,656	0,389	0,534	0,500	0,107
- Year on year net growth (in %)	20,4%	17,4%	14,4%	10,8%	7,7%

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

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



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.