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MOBILES SERVICES

1ST QUARTER 2021

ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

May 6, 2021

A large, abstract graphic in the bottom right corner of the page, consisting of numerous overlapping, light grey lines that form a complex, organic, and somewhat chaotic shape, resembling a stylized flower or a network of connections.

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SUMMARY

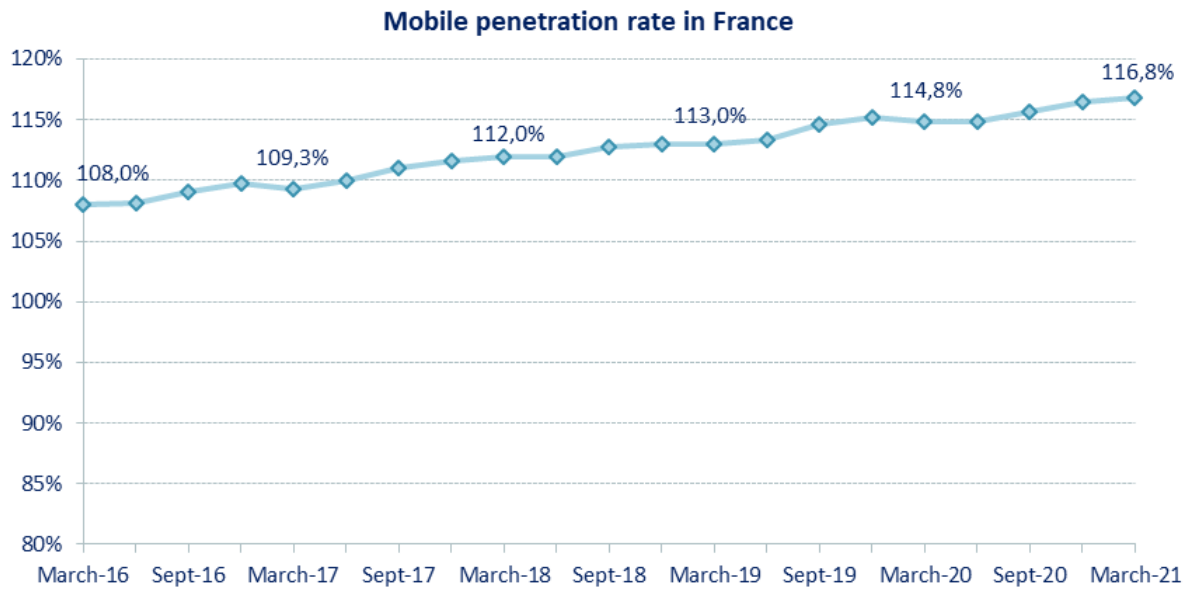
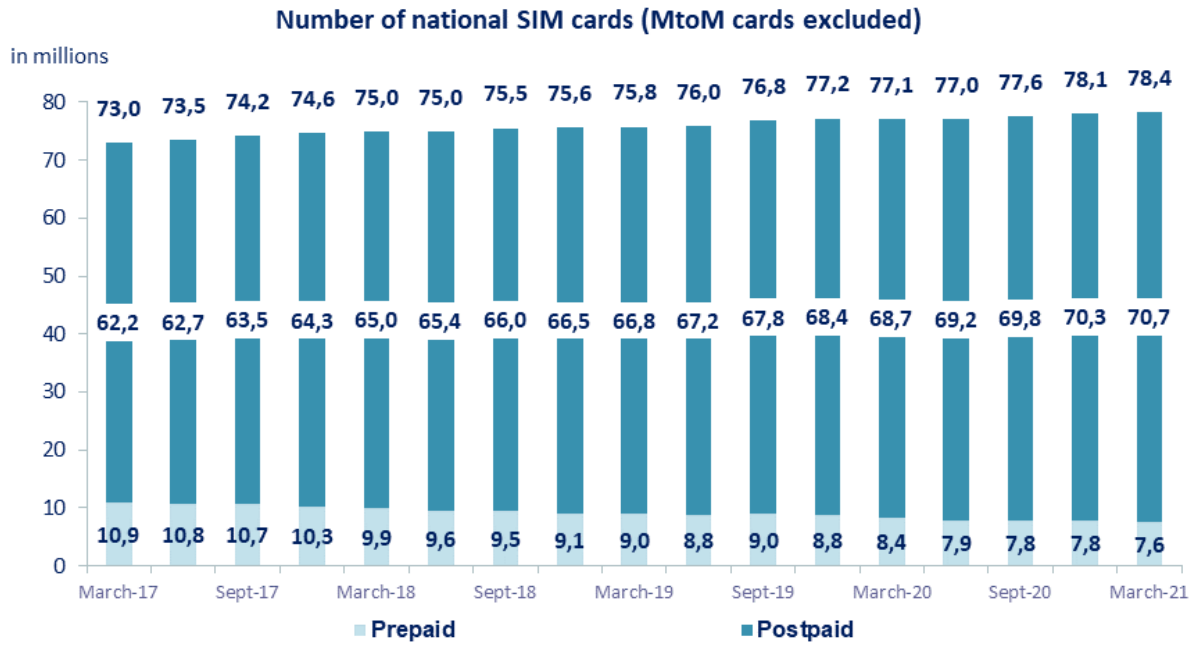
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The quarterly figures relating to the sales turnover and traffic are published three months after the end of the quarter within the [telecommunications observatory in France](#). Except opposite mention, indicators are in millions of units.

A. Mobiles services market - MtoM SIM cards excluded

I. National Report - Total customers and active customers

	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	77,072	77,044	77,609	78,130	78,368
- Quarterly Net Adds	-0,123	-0,027	0,565	0,521	0,238
- Year on year net growth (in %)	1,7%	1,4%	1,0%	1,2%	1,7%
Penetration Rate	114,8%	114,8%	115,6%	116,4%	116,8%
<i>Population at January the 1st of previous year (source: Insee)</i>		67,115			67,473
Postpaid customers	68,711	69,188	69,808	70,335	70,747
- Quarterly Net Adds	0,296	0,476	0,620	0,527	0,412
- Year on year net growth (in %)	2,8%	3,0%	2,9%	2,8%	3,0%
Prepaid customers	8,360	7,857	7,801	7,795	7,621
- Quarterly Net Adds	-0,420	-0,504	-0,055	-0,006	-0,174
- Year on year net growth (in %)	-6,6%	-10,4%	-13,0%	-11,2%	-8,8%
	March-20	Jun-20	Sept-20	Dec-20	March-21
Total active customers	74,877	74,744	75,492	75,917	76,212
- as a % of total customers	97,2%	97,0%	97,3%	97,2%	97,2%
- Quarterly Net Adds	-0,218	-0,133	0,748	0,426	0,295
- Year on year net growth (in %)	1,8%	1,0%	1,0%	1,1%	1,8%
Adjusted figure					



II. Metropolitan report

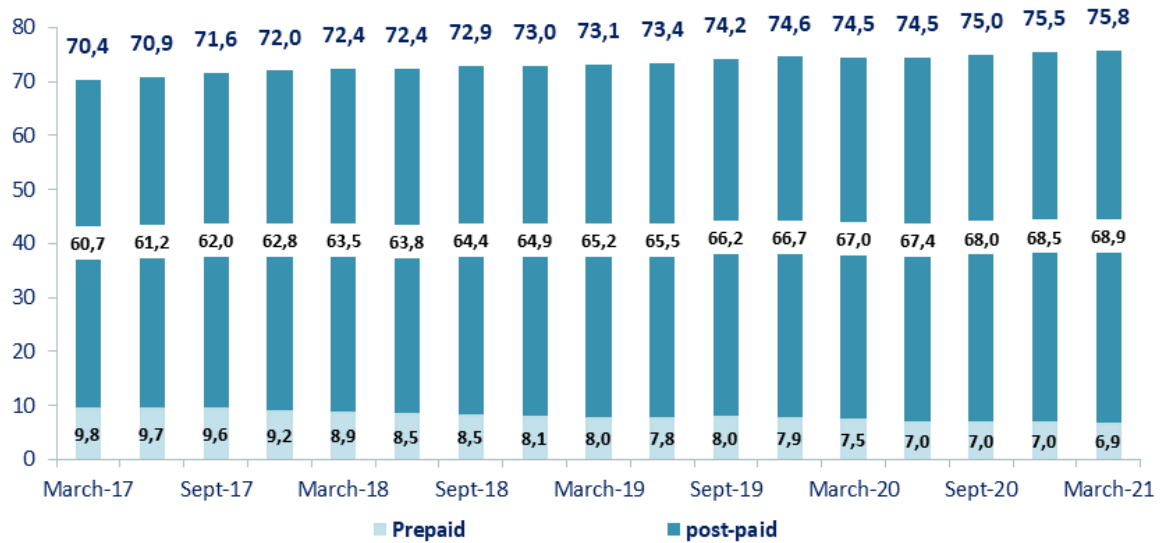


1. Total customers segmentation and total active customers (excluding MtoM SIM cards)

	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	74,475	74,464	75,043	75,539	75,763
among which Internet SIM cards	3,333	3,316	3,353	3,438	3,477
- Quarterly Net Adds	-0,102	-0,012	0,579	0,497	0,224
- Year on year net growth (in %)	1,8%	1,5%	1,1%	1,3%	1,7%
Penetration Rate	114,8%	114,7%	115,6%	116,4%	116,7%
<i>Population at January the 1st of previous year (source: Insee)</i>		64,898			65,250
Postpaid customers	66,991	67,447	68,032	68,511	68,893
among which Internet SIM cards	2,855	2,886	2,880	2,929	2,959
- Quarterly gross sales	2,640	2,333	3,172	3,373	3,126
- Quarterly Net Adds	0,277	0,456	0,586	0,478	0,382
- Year on year net growth (in %)	2,8%	2,9%	2,8%	2,7%	2,8%
Prepaid customers	7,484	7,017	7,010	7,029	6,870
among which Internet SIM cards	0,478	0,430	0,473	0,510	0,518
- Quarterly gross sales	1,836	1,270	1,749	1,661	1,571
- Quarterly Net Adds	-0,379	-0,467	-0,007	0,018	-0,159
- Year on year net growth (in %)	-6,1%	-10,1%	-12,7%	-10,6%	-8,2%
Total active customers	72,530	72,396	73,138	73,527	73,786
- as a % of total customers	97,4%	97,2%	97,5%	97,3%	97,4%
- Quarterly Net Adds	-0,189	-0,134	0,742	0,389	0,259
- Year on year net growth (in %)	1,8%	1,0%	1,0%	1,1%	1,7%
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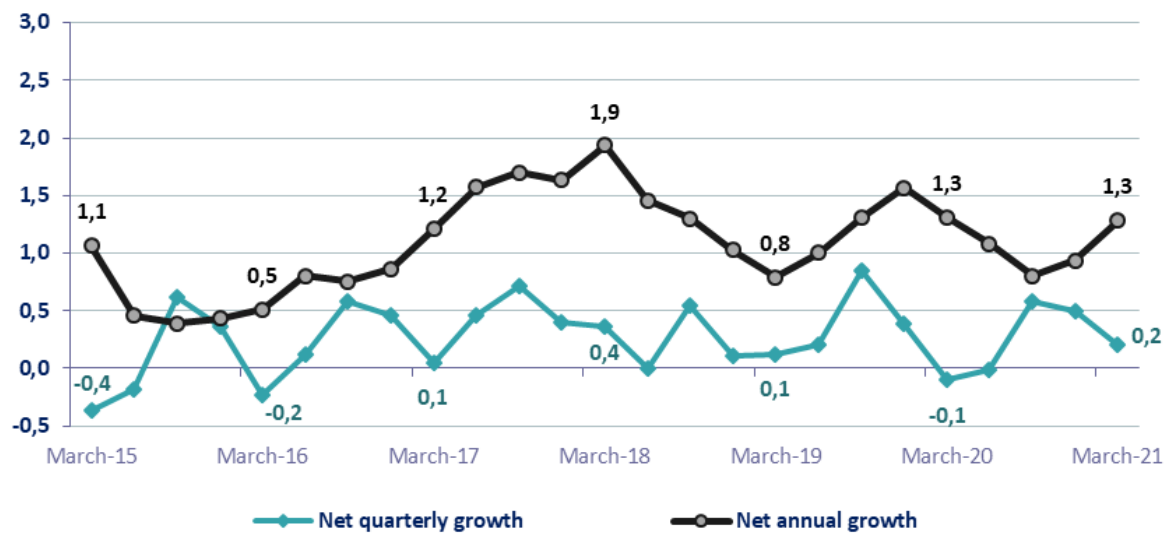
Number of metropolitan SIM cards

in millions



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

in millions



2. Virtual mobile network operators (MVNO) market share

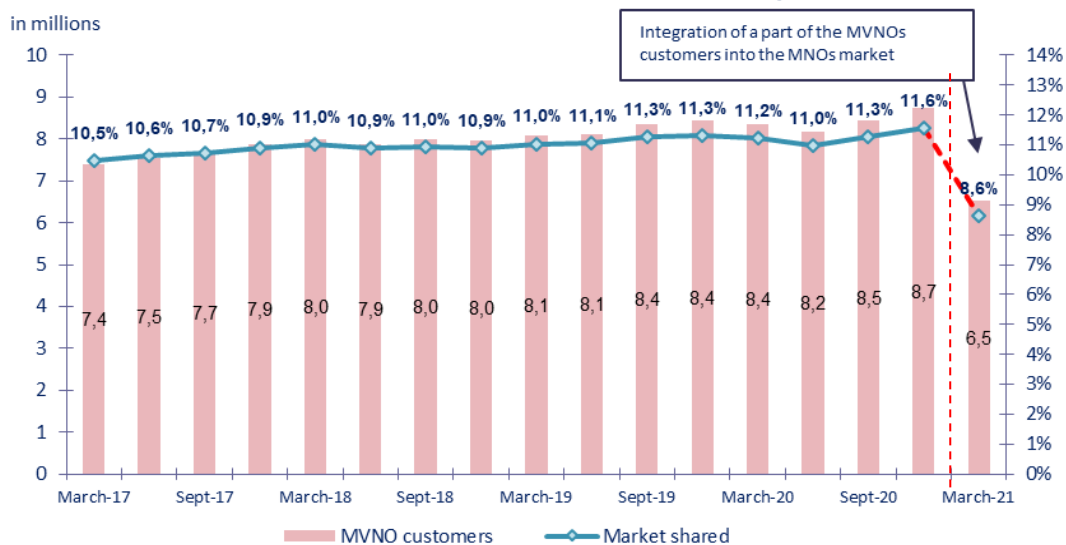


	March-20	Jun-20	Sept-20	Dec-20	March-21
Mobile networks operators (MNOs) customers	66,114	66,280	66,588	66,801	69,009
- Among which postpaid customers	62,482	62,903	63,350	63,621	65,893
- Quarterly Net Adds	-0,021	0,166	0,308	0,213	2,209
- Year on year net growth (in %)	1,6%	1,6%	1,1%	1,0%	4,4%
MVNOs customers	8,362	8,184	8,455	8,738	6,753
- Among which postpaid customers	4,509	4,544	4,683	4,890	3,000
- Quarterly Net Adds	-0,081	-0,178	0,271	0,284	-1,985
- Year on year net growth (in %)	3,5%	1,0%	1,2%	3,5%	-19,2%
MVNO Market share	11,2%	11,0%	11,3%	11,6%	8,9%
MVNO Market share of gross postpaid sales	11,8%	8,9%	10,8%	13,7%	8,0%
MVNO Market share of gross prepaid sales	63,2%	62,7%	61,2%	59,1%	57,4%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

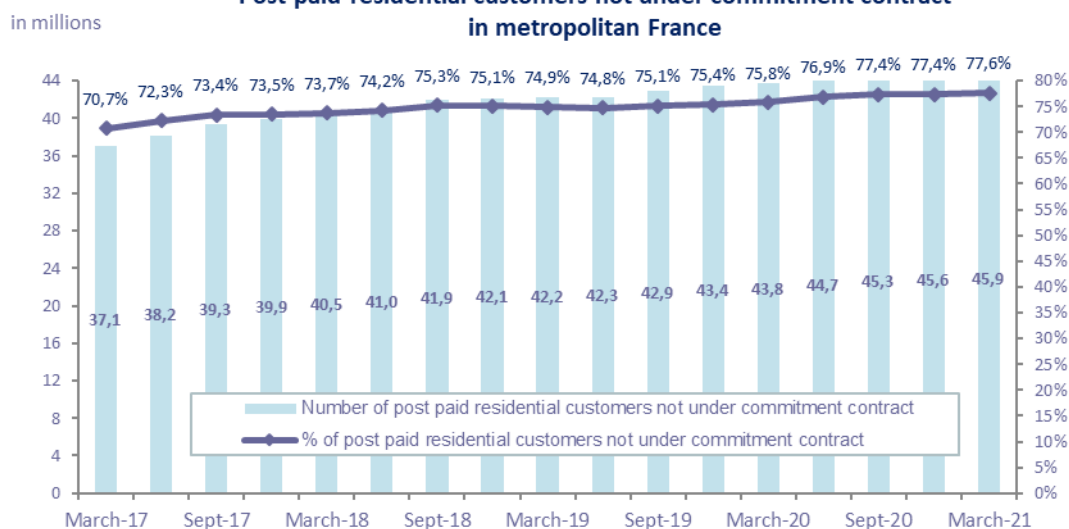
3. Market fluidity

	March-20	Jun-20	Sept-20	Dec-20	March-21
Quarterly postpaid cancellation rate	3,5%	2,8%	3,8%	4,3%	4,0%
Quarterly prepaid cancellation rate	28,8%	23,9%	24,9%	23,3%	24,8%
Numbers ported during the quarter	1,427	1,138	1,509	1,716	1,733
- Year on year net growth (in %)	-11,6%	-19,6%	-1,7%	2,6%	21,4%
Post-paid residential customers not under commitment	43,802	44,669	45,340	45,586	45,901
- % of customers not under commitment contract	75,8%	76,9%	77,4%	77,4%	77,6%
Post-paid customers not under commitment contract	47,244	48,217	48,920	49,129	49,517
- % of customers not under commitment contract	70,5%	71,5%	71,9%	71,7%	71,9%
Adjusted figure					

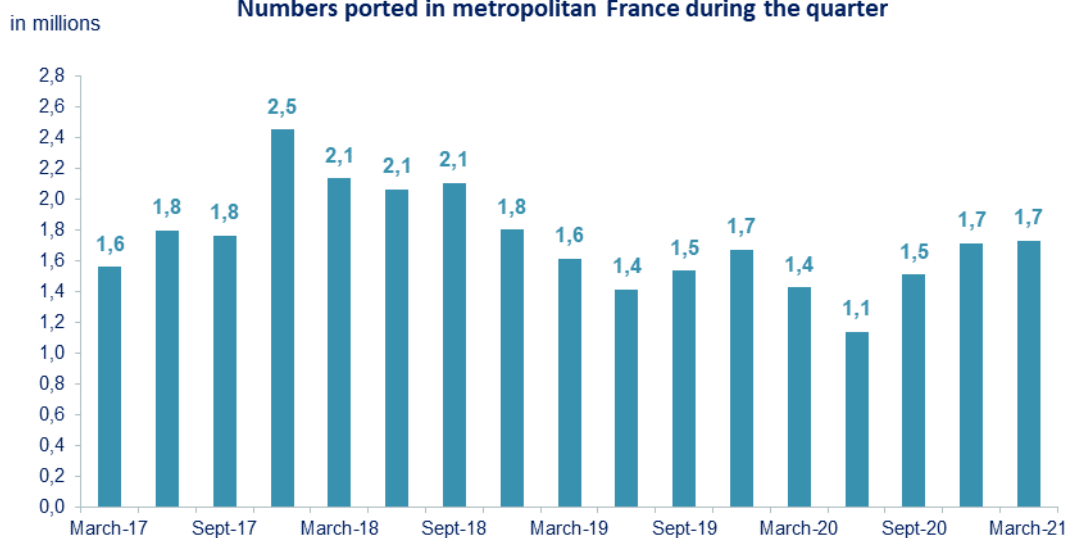
MVNO - Number of SIM cards and market share in metropolitan France



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-20	Jun-20	Sept-20	Dec-20	March-21
Total residential customers	65,274	65,141	65,621	65,944	66,015
among which Internet SIM cards	1,986	1,936	1,977	2,018	2,041
- Quarterly Net Adds	-0,199	-0,133	0,480	0,322	0,071
- Year on year net growth (in %)	1,5%	1,2%	0,7%	0,7%	1,1%
Postpaid residential customers	57,790	58,124	58,611	58,915	59,145
- Quarterly gross sales	2,239	2,009	2,766	2,814	2,628
- Quarterly Net Adds	0,180	0,334	0,487	0,304	0,230
- Year on year net growth (in %)	2,6%	2,7%	2,6%	2,3%	2,3%
Prepaid residential customers	7,484	7,017	7,010	7,029	6,870
- Quarterly gross sales	1,836	1,270	1,749	1,661	1,571
- Quarterly Net Adds	-0,379	-0,467	-0,007	0,018	-0,159
- Year on year net growth (in %)	-6,1%	-10,1%	-12,7%	-10,6%	-8,2%

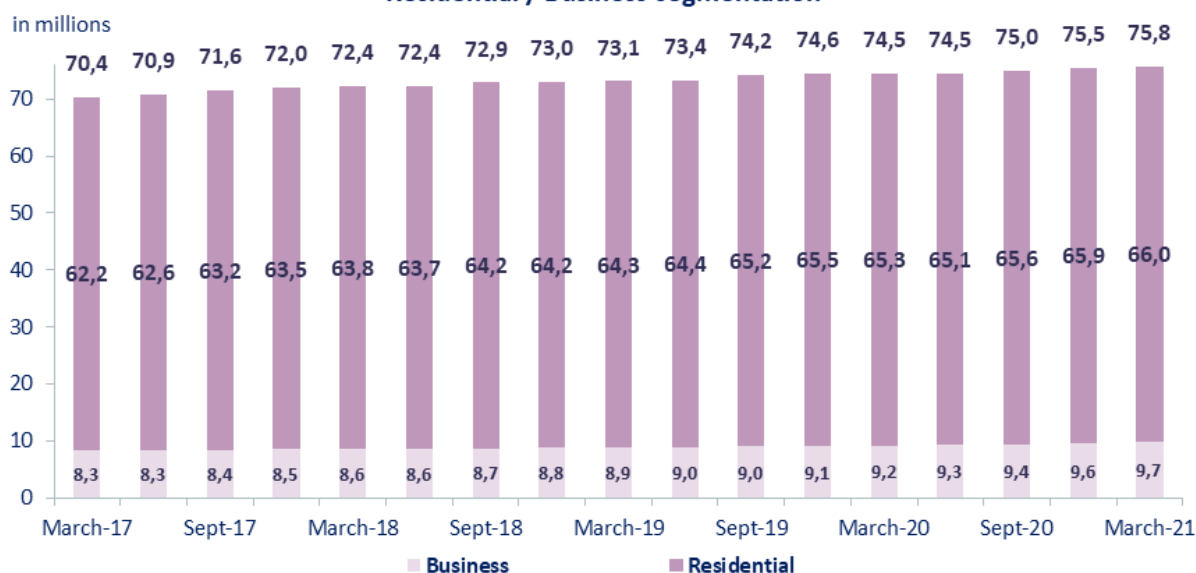
2. Residential market - Mobile Virtual Network Operators market share

	March-20	Jun-20	Sept-20	Dec-20	March-21
MNOs	57,406	57,459	57,677	57,731	59,746
- Quarterly Net Adds	-0,104	0,053	0,218	0,054	2,015
- Year on year net growth (in %)	1,3%	1,3%	0,7%	0,4%	4,1%
MVNOs	7,868	7,682	7,944	8,213	6,269
- Quarterly Net Adds	-0,094	-0,186	0,262	0,269	-1,944
- Year on year net growth (in %)	3,0%	0,4%	0,8%	3,1%	-20,3%
MVNO Market share	12,1%	11,8%	12,1%	12,5%	9,5%
MVNO Market share of gross postpaid sales	12,4%	9,0%	11,9%	15,4%	8,2%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

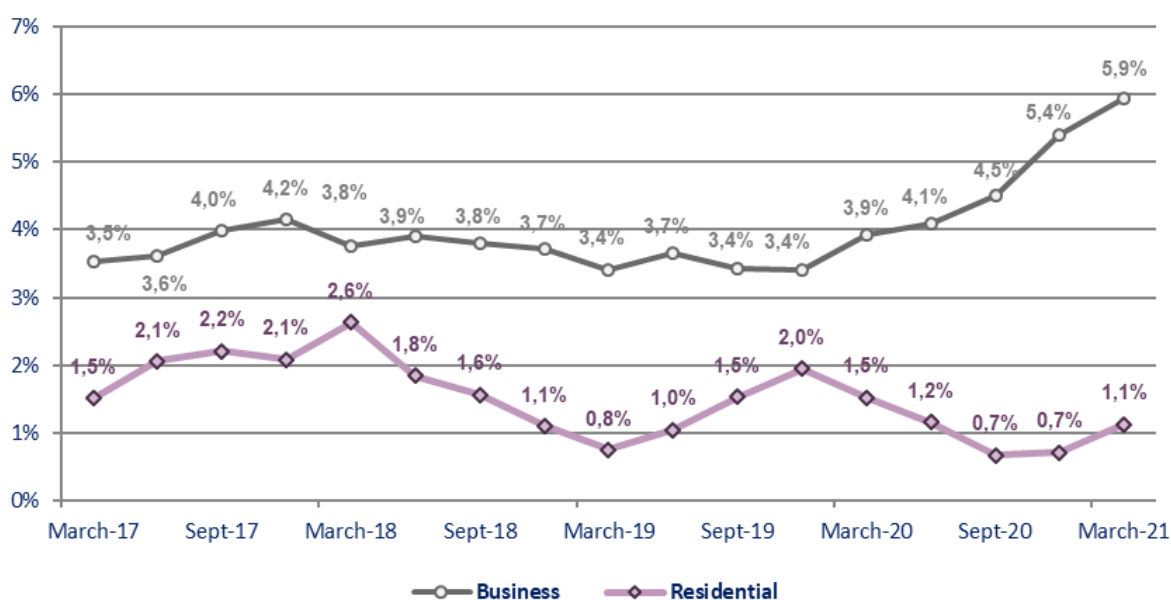
3. Business market - total customers MtoM SIM cards excluded

	March-20	Jun-20	Sept-20	Dec-20	March-21
Postpaid business customers	9,201	9,323	9,421	9,596	9,748
among which Internet SIM cards	1,347	1,380	1,377	1,420	1,436
- Quarterly Net Adds	0,097	0,121	0,099	0,174	0,153
- Year on year net growth (in %)	3,9%	4,1%	4,5%	5,4%	5,9%
Adjusted figure					

Number of SIM cards in metropolitan France Residential / Business segmentation



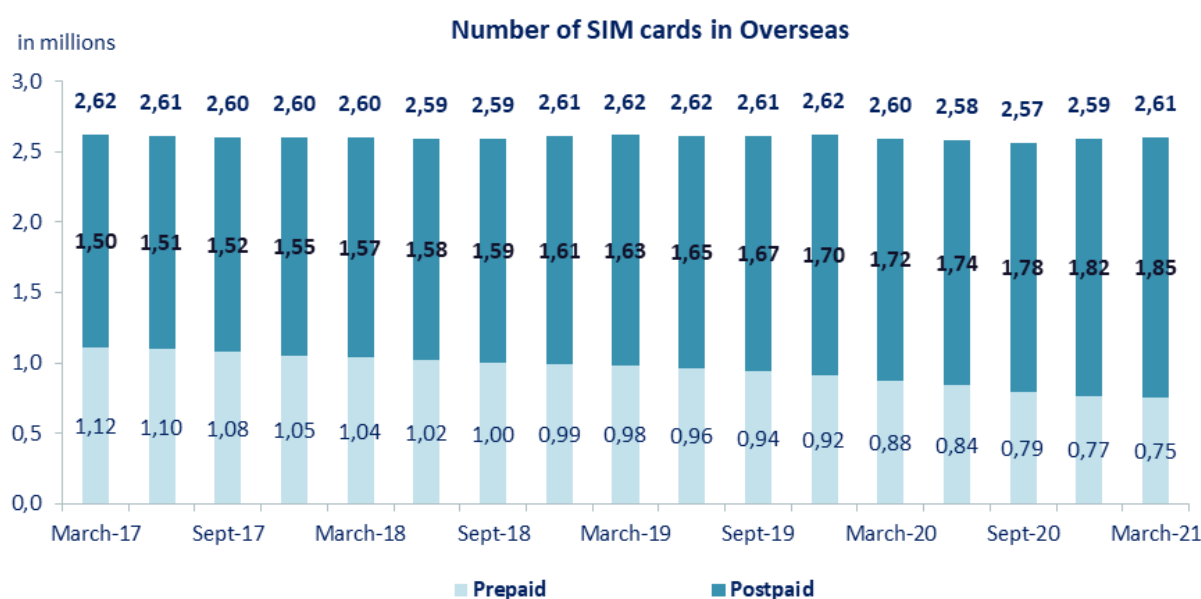
Year on year net growth of residential and business SIM cards



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

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

	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	2,596	2,581	2,566	2,591	2,606
- Quarterly Net Adds	-0,021	-0,015	-0,014	0,025	0,015
- Year on year net growth (in %)	-0,8%	-1,3%	-1,8%	-1,0%	0,4%
Penetration Rate	117,1%	116,4%	115,7%	116,9%	117,5%
<i>Population at January the 1st of previous year (source: Insee)</i>	2,217				2,224
Postpaid customers	1,720	1,741	1,775	1,825	1,855
- Quarterly Net Adds	0,020	0,021	0,034	0,049	0,030
- Year on year net growth (in %)	5,3%	5,5%	6,0%	7,3%	7,8%
Prepaid customers	0,876	0,840	0,791	0,766	0,751
- Quarterly Net Adds	-0,041	-0,036	-0,048	-0,025	-0,016
- Year on year net growth (in %)	-11,0%	-13,0%	-15,8%	-16,4%	-14,3%
Total active customers	2,347	2,347	2,354	2,390	2,426
- as a % of total customers	90,4%	91,0%	91,7%	92,3%	93,1%
- Quarterly Net Adds	-0,028	0,001	0,006	0,037	0,036
- Year on year net growth (in %)	0,0%	0,0%	0,1%	0,7%	3,4%
Adjusted figure					



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



	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	0,618	0,613	0,607	0,603	0,610
- Quarterly Net Adds	-0,006	-0,004	-0,006	-0,003	0,007
- Year on year net growth (in %)	-1,3%	-2,4%	-2,8%	-3,2%	-1,2%
Penetration Rate	146,2%	145,2%	143,6%	142,8%	144,5%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,422			0,421
Postpaid customers	0,376	0,381	0,390	0,399	0,406
- Quarterly Net Adds	0,004	0,005	0,010	0,008	0,007
- Year on year net growth (in %)	3,6%	4,3%	6,5%	7,4%	8,0%
Prepaid customers	0,242	0,233	0,216	0,205	0,205
- Quarterly Net Adds	-0,010	-0,009	-0,016	-0,012	0,000
- Year on year net growth (in %)	-8,0%	-11,6%	-15,9%	-18,9%	-15,4%
Total active customers	0,528	0,532	0,533	0,536	0,541
- as a % of total customers	85,5%	86,7%	87,9%	88,8%	88,6%
- Quarterly Net Adds	-0,010	0,004	0,002	0,002	0,005
- Year on year net growth (in %)	-1,8%	-1,5%	-0,2%	-0,5%	2,4%

3. Guyane: total customers and total active customers segmentation



	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	0,293	0,290	0,284	0,280	0,282
- Quarterly Net Adds	-0,004	-0,004	-0,006	-0,003	0,001
- Year on year net growth (in %)	-2,6%	-4,3%	-5,1%	-5,8%	-4,1%
Penetration Rate	100,9%	99,6%	97,5%	96,4%	96,8%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,291			0,294
Postpaid customers	0,139	0,143	0,150	0,158	0,165
- Quarterly Net Adds	0,003	0,004	0,007	0,008	0,007
- Year on year net growth (in %)	7,0%	9,2%	12,9%	16,2%	18,8%
Prepaid customers	0,154	0,146	0,133	0,122	0,116
- Quarterly Net Adds	-0,007	-0,008	-0,013	-0,011	-0,006
- Year on year net growth (in %)	-9,9%	-14,7%	-19,6%	-24,4%	-24,7%
Total active customers	0,256	0,255	0,261	0,266	0,267
- as a % of total customers	87,3%	88,1%	92,1%	94,8%	94,9%
- Quarterly Net Adds	-0,006	-0,001	0,006	0,004	0,002
- Year on year net growth (in %)	-1,5%	-2,2%	0,6%	1,2%	4,3%

4. Martinique: total customers and total active customers segmentation



	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	0,523	0,524	0,517	0,509	0,513
- Quarterly Net Adds	-0,006	0,001	-0,008	-0,007	0,004
- Year on year net growth (in %)	-1,5%	-1,7%	-3,1%	-3,8%	-2,0%
Penetration Rate	145,9%	146,1%	144,0%	141,9%	143,0%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,359			0,355
Postpaid customers	0,341	0,344	0,350	0,356	0,360
- Quarterly Net Adds	0,003	0,002	0,007	0,006	0,004
- Year on year net growth (in %)	2,7%	2,9%	4,2%	5,0%	5,4%
Prepaid customers	0,182	0,180	0,166	0,153	0,153
- Quarterly Net Adds	-0,009	-0,002	-0,014	-0,013	0,000
- Year on year net growth (in %)	-8,6%	-9,5%	-15,5%	-19,5%	-15,9%
Total active customers	0,441	0,446	0,444	0,446	0,447
- as a % of total customers	84,2%	85,1%	86,0%	87,6%	87,1%
- Quarterly Net Adds	-0,007	0,006	-0,002	0,001	0,001
- Year on year net growth (in %)	-1,7%	-0,6%	-0,4%	-0,3%	1,4%

5. Mayotte: total customers and total active customers segmentation



	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	0,271	0,264	0,267	0,289	0,288
- Quarterly Net Adds	-0,007	-0,007	0,003	0,022	-0,001
- Year on year net growth (in %)	-5,5%	-4,9%	-3,3%	4,1%	6,3%
Penetration Rate	96,9%	94,4%	95,4%	103,2%	102,9%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,279			0,289
Postpaid customers	0,068	0,069	0,070	0,077	0,080
- Quarterly Net Adds	0,000	0,001	0,001	0,007	0,002
- Year on year net growth (in %)	3,3%	5,7%	6,4%	14,7%	17,6%
Prepaid customers	0,203	0,195	0,197	0,211	0,208
- Quarterly Net Adds	-0,007	-0,008	0,002	0,015	-0,003
- Year on year net growth (in %)	-8,1%	-8,1%	-6,4%	0,6%	2,5%
Total active customers	0,249	0,242	0,236	0,249	0,259
- as a % of total customers	92,0%	91,8%	88,6%	86,3%	89,9%
- Quarterly Net Adds	-0,004	-0,007	-0,006	0,013	0,010
- Year on year net growth (in %)	-0,2%	-1,4%	-5,2%	-1,8%	3,8%

6. Réunion: total customers and total active customers segmentation



	March-20	Jun-20	Sept-20	Dec-20	March-21
Total customers	0,886	0,885	0,888	0,904	0,908
- Quarterly Net Adds	0,001	-0,001	0,003	0,017	0,003
- Year on year net growth (in %)	2,1%	1,9%	1,2%	2,2%	2,5%
Penetration Rate	103,0%	102,9%	103,2%	105,2%	105,6%
<i>Population at January the 1st of previous year (source: Insee)</i>		0,860			0,858
Postpaid customers	0,791	0,799	0,809	0,829	0,839
- Quarterly Net Adds	0,009	0,008	0,010	0,020	0,009
- Year on year net growth (in %)	7,2%	6,6%	5,4%	6,1%	6,0%
Prepaid customers	0,095	0,085	0,078	0,075	0,069
- Quarterly Net Adds	-0,008	-0,009	-0,007	-0,004	-0,006
- Year on year net growth (in %)	-27,0%	-28,0%	-28,6%	-27,0%	-27,0%
Total active customers	0,867	0,867	0,873	0,889	0,907
- as a % of total customers	97,9%	98,0%	98,4%	98,3%	99,9%
- Quarterly Net Adds	-0,001	-0,001	0,006	0,016	0,018
- Year on year net growth (in %)	2,7%	2,3%	1,8%	2,4%	4,6%
Adjusted figure					

B. Internet of things: MtoM SIM cards

I. MtoM cards of French operators

	March-20	Jun-20	Sept-20	Dec-20	March-21
MtoM SIM cards	21,362	21,488	21,819	22,238	22,406
- Gross sales for the quarter	0,727	0,427	0,608	0,669	0,683
- Quarterly Net Adds	0,500	0,126	0,331	0,419	0,168
- Year on year net growth (in %)	10,8%	7,8%	7,3%	6,6%	4,9%

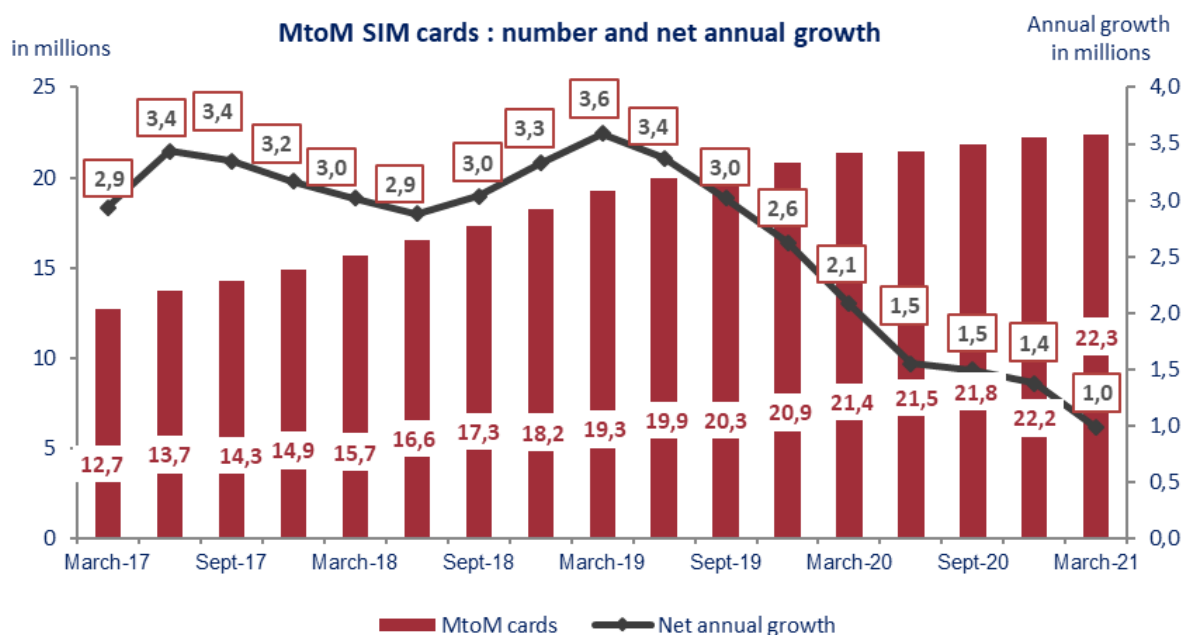
1. MtoM cards of French operators - Metropolitan

	March-20	Jun-20	Sept-20	Dec-20	March-21
MtoM SIM cards	21,327	21,453	21,785	22,205	22,372
- Quarterly Net Adds	0,500	0,126	0,332	0,420	0,167
- Year on year net growth (in %)	10,8%	7,8%	7,4%	6,6%	4,9%

2. MtoM cards of French operators - Overseas departments

	March-20	Jun-20	Sept-20	Dec-20	March-21
MtoM SIM cards	0,035	0,035	0,034	0,033	0,033
- Quarterly Net Adds	0,000	0,000	0,000	-0,001	0,000
- Year on year net growth (in %)	-2,1%	-3,8%	-0,2%	-4,3%	-4,0%

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, 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.