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ELECTRONIC COMMUNICATIONS MARKET OBSERVATORY

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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.

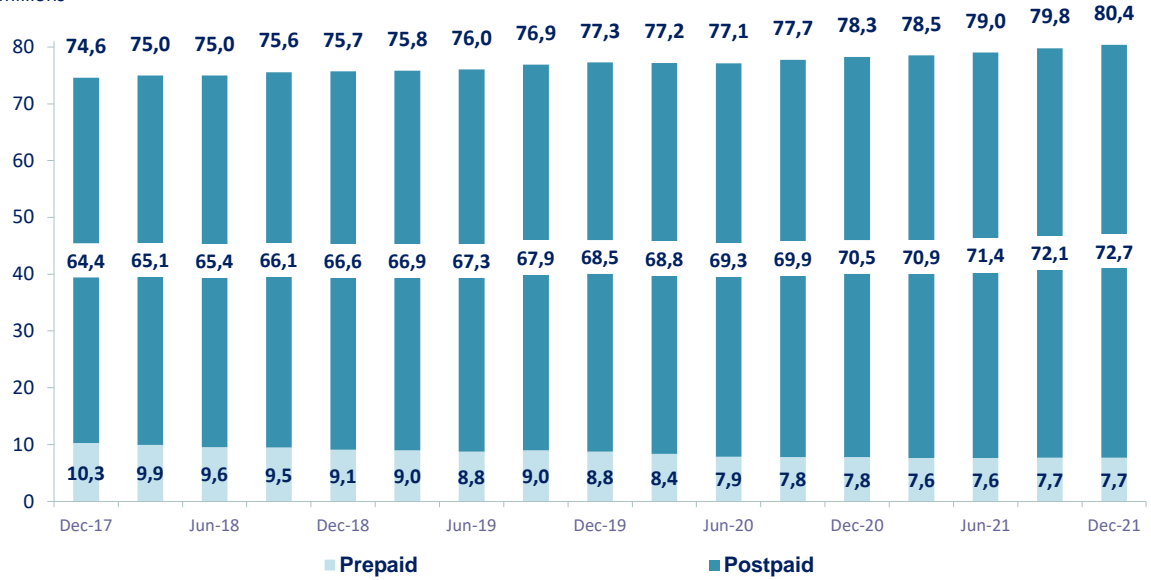
A. Mobiles services market - MtoM SIM cards excluded

I. National Report - Total customers and active customers

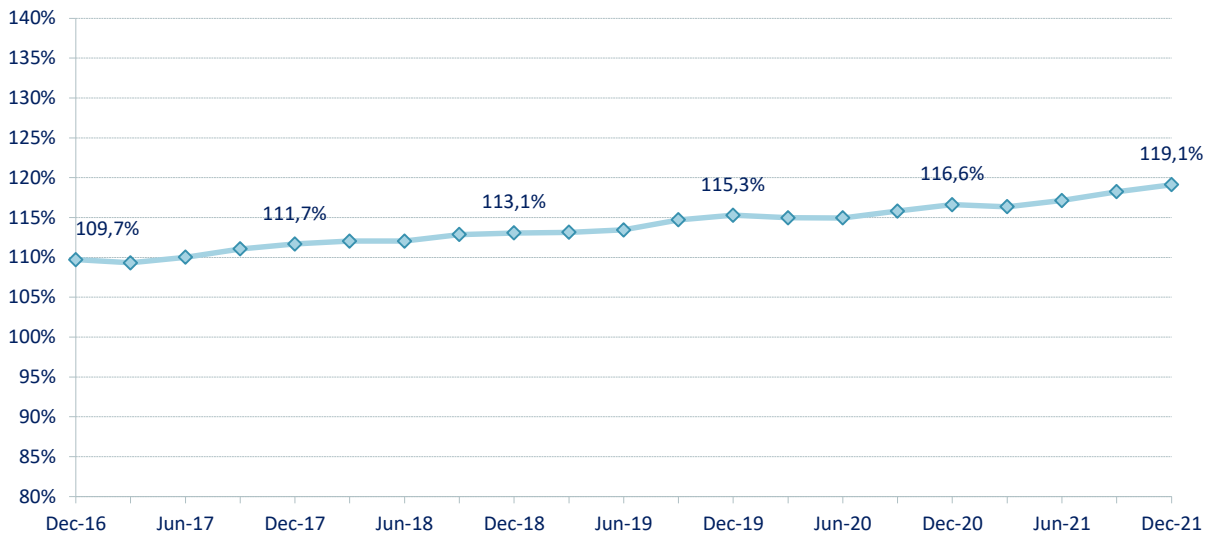
	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	78,263	78,512	79,042	79,786	80,379
- Quarterly Net Adds	0,533	0,249	0,531	0,743	0,593
- Year on year net growth (in %)	1,3%	1,7%	2,5%	2,6%	2,7%
Penetration Rate	116,6%	116,4%	117,1%	118,2%	119,1%
<i>Population at January the 1st of previous year (source: Insee)</i>	67,115		67,473		
Postpaid customers	70,467	70,890	71,421	72,080	72,693
- Quarterly Net Adds	0,540	0,423	0,530	0,659	0,614
- Year on year net growth (in %)	2,9%	3,0%	3,1%	3,1%	3,2%
Prepaid customers	7,795	7,621	7,622	7,706	7,685
- Quarterly Net Adds	-0,006	-0,174	0,000	0,084	-0,021
- Year on year net growth (in %)	-11,2%	-8,8%	-3,0%	-1,2%	-1,4%
	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total active customers	76,050	76,330	76,788	77,591	78,206
- as a % of total customers	97,2%	97,2%	97,1%	97,2%	97,3%
- Quarterly Net Adds	0,438	0,280	0,458	0,803	0,615
- Year on year net growth (in %)	1,1%	1,8%	2,6%	2,6%	2,8%
Adjusted figure					

Number of national SIM cards (MtoM cards excluded)

in millions



Mobile penetration rate in France (MtoM cards excluded)



II. Metropolitan report

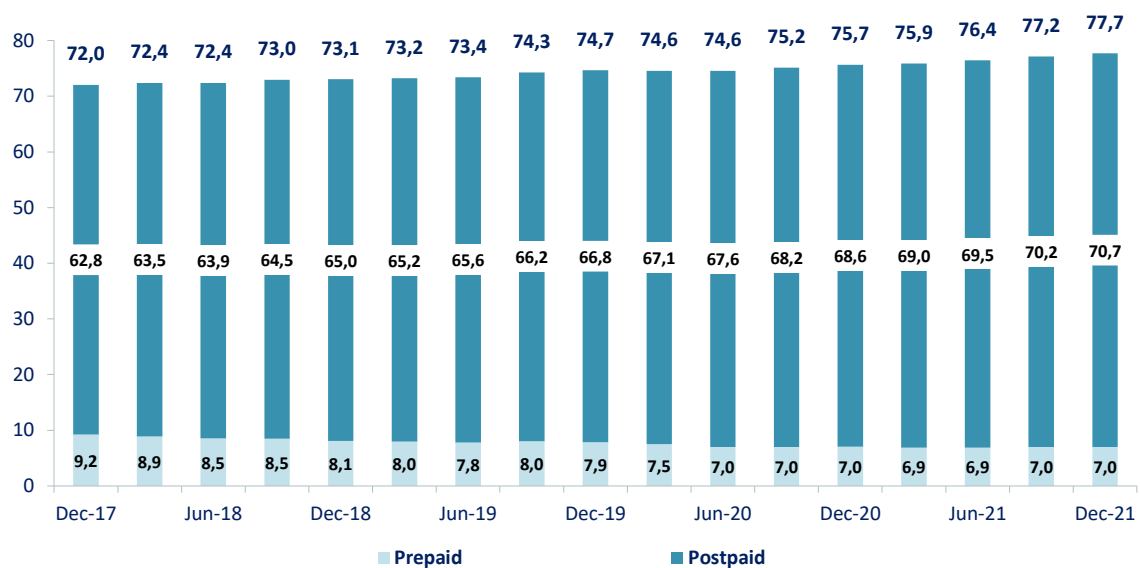


1. Total customers segmentation and total active customers (excluding MtoM SIM cards)

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	75,672	75,906	76,437	77,154	77,703
among which Internet SIM cards	3,439	3,484	3,586	3,641	3,650
- Quarterly Net Adds	0,509	0,234	0,531	0,717	0,550
- Year on year net growth (in %)	1,3%	1,8%	2,5%	2,6%	2,7%
Penetration Rate	116,6%	116,3%	117,1%	118,2%	119,1%
<i>Population at January the 1st of previous year (source: Insee)</i>	64,898		65,250		
Postpaid customers	68,643	69,036	69,533	70,154	70,733
among which Internet SIM cards	2,929	2,966	3,004	3,014	3,023
- Quarterly gross sales	3,394	3,145	3,214	3,291	3,498
- Quarterly Net Adds	0,490	0,393	0,498	0,621	0,579
- Year on year net growth (in %)	2,8%	2,9%	2,9%	2,9%	3,0%
Prepaid customers	7,029	6,870	6,904	7,000	6,970
among which Internet SIM cards	0,510	0,518	0,582	0,627	0,627
- Quarterly gross sales	1,661	1,571	1,556	1,871	1,807
- Quarterly Net Adds	0,019	-0,159	0,033	0,096	-0,030
- Year on year net growth (in %)	-10,6%	-8,2%	-1,6%	-0,2%	-0,8%
Total active customers	73,659	73,924	74,362	75,144	75,726
- as a % of total customers	97,3%	97,4%	97,3%	97,4%	97,5%
- Quarterly Net Adds	0,401	0,265	0,438	0,782	0,582
- Year on year net growth (in %)	1,2%	1,8%	2,6%	2,6%	2,8%
Adjusted figure					

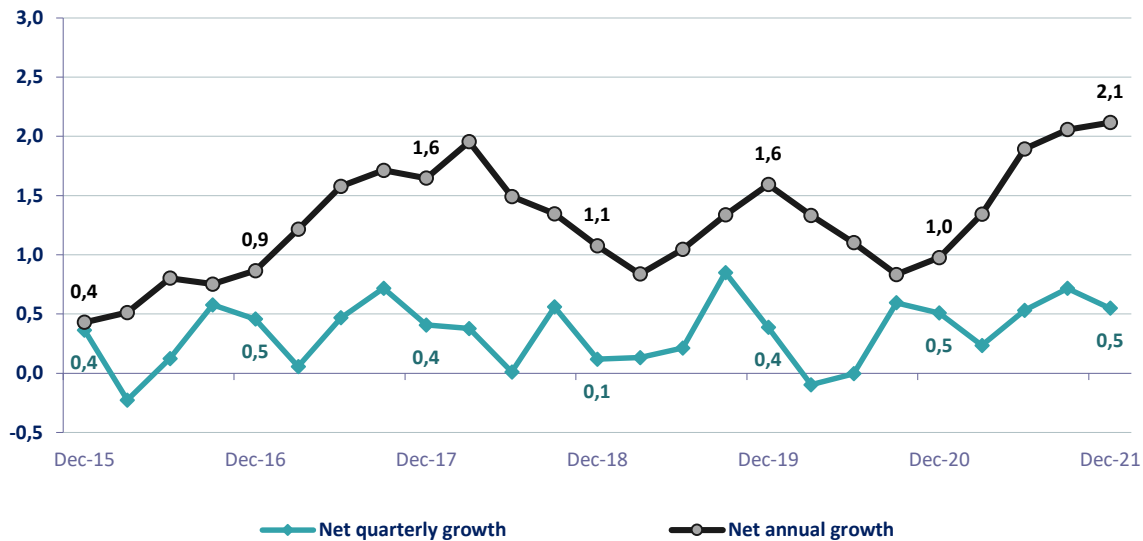
Number of metropolitan SIM cards (MtoM cards excluded)

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

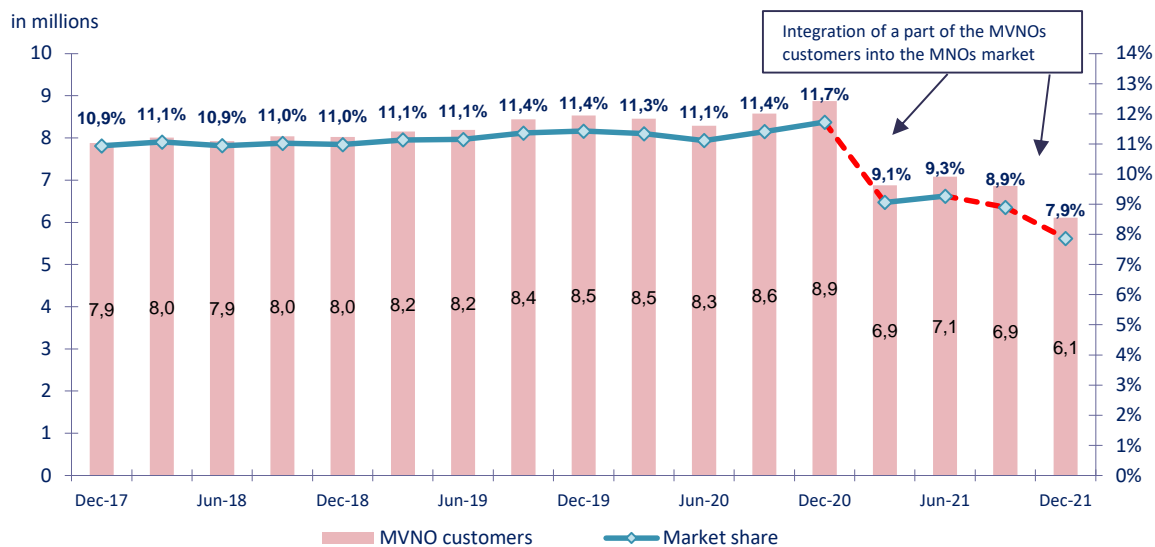


	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Mobile networks operators (MNOs) customers	66,802	69,026	69,353	70,291	71,590
- Among which postpaid customers	63,622	65,909	66,283	67,215	67,720
- Quarterly Net Adds	0,214	2,225	0,326	0,939	1,299
- Year on year net growth (in %)	1,0%	4,4%	4,6%	5,6%	7,2%
MVNOs customers	8,870	6,880	7,085	6,863	6,113
- Among which postpaid customers	5,021	3,126	3,250	2,939	3,013
- Quarterly Net Adds	0,295	-1,990	0,205	-0,222	-0,749
- Year on year net growth (in %)	3,9%	-18,7%	-14,5%	-20,0%	-31,1%
MVNO Market share	11,7%	9,1%	9,3%	8,9%	7,9%
MVNO Market share of gross postpaid sales	14,2%	8,6%	8,6%	5,4%	6,1%
MVNO Market share of gross prepaid sales	59,1%	57,4%	63,4%	62,0%	56,5%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

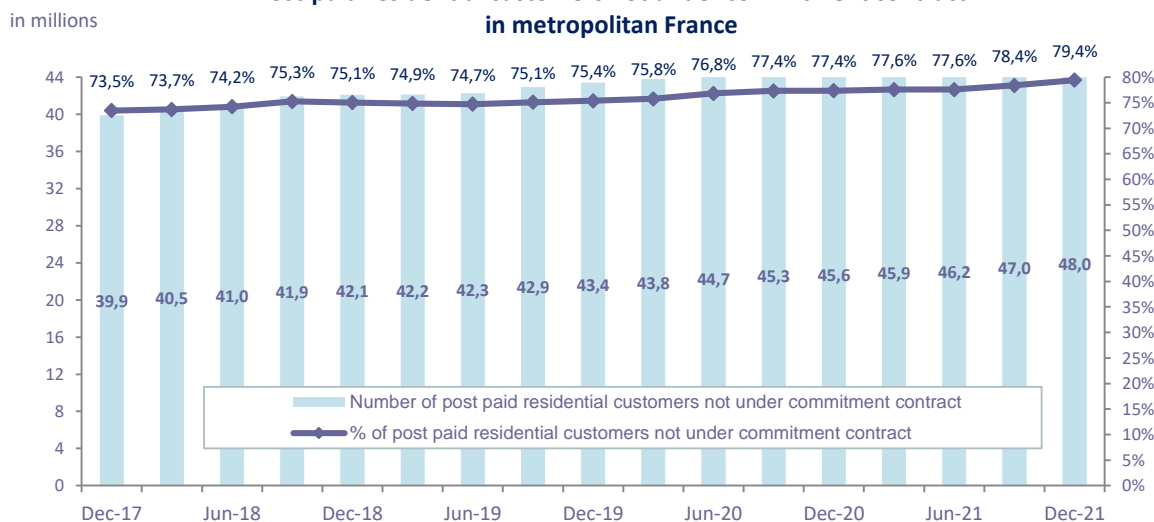
3. Market fluidity

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Quarterly postpaid cancellation rate	4,3%	4,0%	3,9%	3,8%	4,1%
Quarterly prepaid cancellation rate	23,3%	24,8%	22,0%	25,4%	26,2%
Numbers ported during the quarter	1,718	1,735	1,777	1,647	1,875
- Year on year net growth (in %)	2,6%	21,4%	55,8%	9,0%	9,2%
Post-paid residential customers not under commitment	45,581	45,895	46,160	47,033	47,998
- % of customers not under commitment contract	77,4%	77,6%	77,6%	78,4%	79,4%
Post-paid customers not under commitment contract	49,247	49,642	49,936	50,878	52,036
- % of customers not under commitment contract	71,7%	71,9%	71,8%	72,5%	73,6%
Adjusted figure					

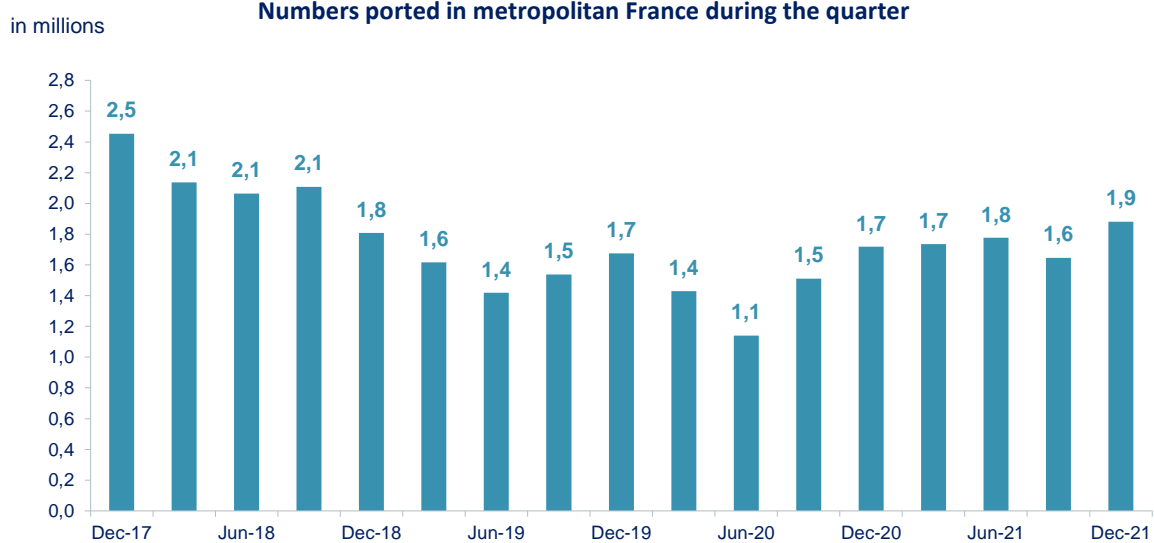
MVNO - Number of SIM cards and market share in metropolitan France



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

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total residential customers	65,944	66,015	66,394	66,991	67,383
among which Internet SIM cards	2,018	2,041	2,116	2,168	2,174
- Quarterly Net Adds	0,323	0,071	0,379	0,597	0,392
- Year on year net growth (in %)	0,7%	1,1%	1,9%	2,1%	2,2%
Postpaid residential customers	58,915	59,145	59,490	59,991	60,413
- Quarterly gross sales	2,814	2,628	2,695	2,887	3,036
- Quarterly Net Adds	0,304	0,230	0,345	0,501	0,422
- Year on year net growth (in %)	2,3%	2,3%	2,3%	2,4%	2,5%
Prepaid residential customers	7,029	6,870	6,904	7,000	6,970
- Quarterly gross sales	1,661	1,571	1,556	1,871	1,807
- Quarterly Net Adds	0,019	-0,159	0,033	0,096	-0,030
- Year on year net growth (in %)	-10,6%	-8,2%	-1,6%	-0,2%	-0,8%

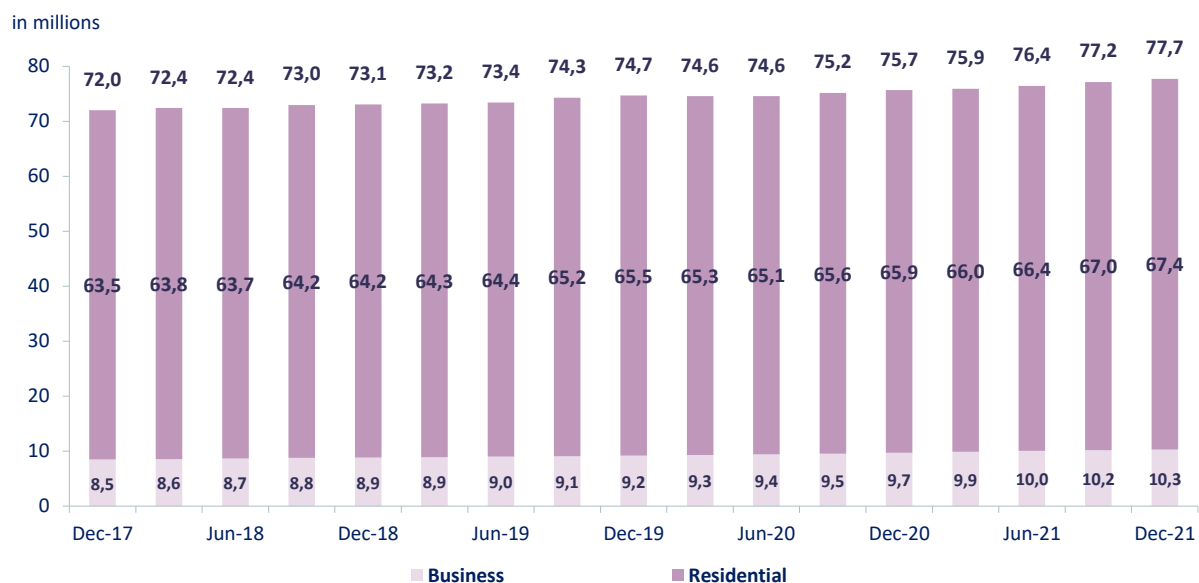
2. Residential market - Mobile Virtual Network Operators market share

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
MNOs	57,731	59,749	59,959	60,799	61,978
- Quarterly Net Adds	0,054	2,018	0,210	0,841	1,179
- Year on year net growth (in %)	0,4%	4,1%	4,4%	5,4%	7,4%
MVNOs	8,213	6,266	6,435	6,192	5,405
- Quarterly Net Adds	0,269	-1,947	0,169	-0,243	-0,787
- Year on year net growth (in %)	3,1%	-20,4%	-16,2%	-22,1%	-34,2%
MVNO Market share	12,5%	9,5%	9,7%	9,2%	8,0%
MVNO Market share of gross postpaid sales	15,4%	8,2%	8,1%	4,3%	4,8%
Irrelevant growth : Integration of a part of the MVNOs customers into the MNOs market					

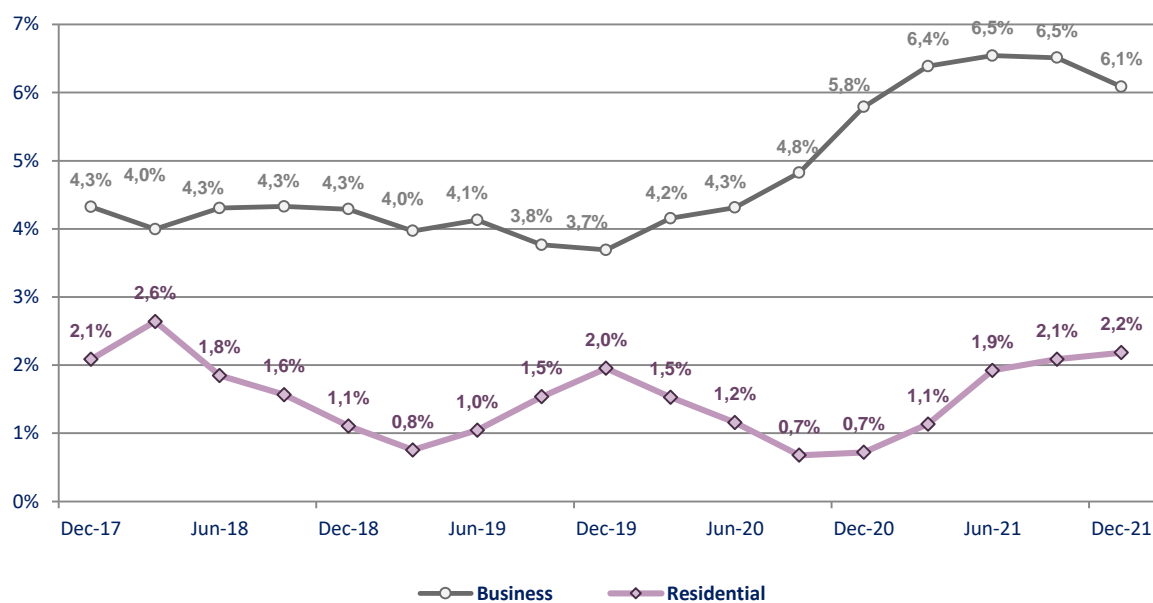
3. Business market - total customers MtoM SIM cards excluded

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Postpaid business customers	9,728	9,891	10,043	10,163	10,320
among which Internet SIM cards	1,421	1,443	1,470	1,473	1,476
- Quarterly Net Adds	0,186	0,163	0,152	0,119	0,157
- Year on year net growth (in %)	5,8%	6,4%	6,5%	6,5%	6,1%
Adjusted figure					

Number of SIM cards in metropolitan France Residential / Business segmentation



Year on year net growth of residential and business SIM cards

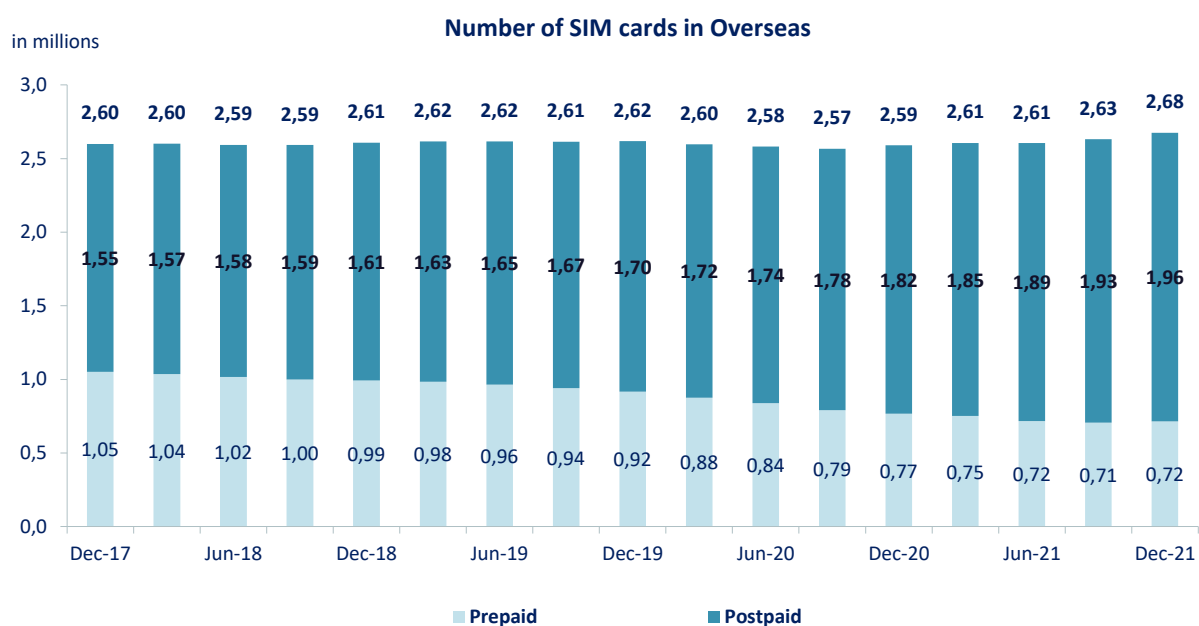


IV. Overseas report: DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

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

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	2,591	2,606	2,605	2,632	2,675
- Quarterly Net Adds	0,025	0,015	0,000	0,026	0,044
- Year on year net growth (in %)	-1,0%	0,4%	1,0%	2,5%	3,3%
Penetration Rate	116,9%	117,2%	117,2%	118,4%	120,3%
Population at January the 1 st of previous year (source: Insee)	2,217		2,224		
Postpaid customers	1,825	1,855	1,887	1,926	1,960
- Quarterly Net Adds	0,049	0,030	0,033	0,038	0,034
- Year on year net growth (in %)	7,3%	7,8%	8,4%	8,5%	7,4%
Prepaid customers	0,766	0,751	0,718	0,706	0,715
- Quarterly Net Adds	-0,025	-0,016	-0,033	-0,012	0,009
- Year on year net growth (in %)	-16,4%	-14,3%	-14,5%	-10,8%	-6,7%
Total active customers	2,390	2,406	2,426	2,447	2,480
- as a % of total customers	92,3%	92,3%	93,1%	93,0%	92,7%
- Quarterly Net Adds	0,037	0,015	0,020	0,021	0,034
- Year on year net growth (in %)	0,7%	2,5%	3,3%	3,9%	3,8%

Adjusted figure



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



	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	0,603	0,610	0,605	0,613	0,623
- Quarterly Net Adds	-0,003	0,007	-0,005	0,008	0,010
- Year on year net growth (in %)	-3,2%	-1,2%	-1,3%	1,0%	3,2%
Penetration Rate	142,8%	145,0%	143,8%	145,6%	148,0%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,422		0,421		
Postpaid customers	0,399	0,406	0,414	0,422	0,430
- Quarterly Net Adds	0,008	0,007	0,008	0,008	0,008
- Year on year net growth (in %)	7,4%	8,0%	8,8%	8,1%	7,7%
Prepaid customers	0,205	0,205	0,191	0,191	0,193
- Quarterly Net Adds	-0,012	0,000	-0,013	0,000	0,002
- Year on year net growth (in %)	-18,9%	-15,4%	-17,8%	-11,8%	-5,5%
Total active customers	0,536	0,541	0,547	0,546	0,553
- as a % of total customers	88,8%	88,6%	90,4%	89,1%	88,8%
- Quarterly Net Adds	0,002	0,005	0,006	-0,001	0,007
- Year on year net growth (in %)	-0,5%	2,4%	2,9%	2,5%	3,3%

3. Guyane: total customers and total active customers segmentation



	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	0,280	0,282	0,279	0,286	0,296
- Quarterly Net Adds	-0,003	0,001	-0,003	0,007	0,010
- Year on year net growth (in %)	-5,8%	-4,1%	-3,8%	0,8%	5,7%
Penetration Rate	96,4%	95,7%	94,8%	97,2%	100,7%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,291		0,294		
Postpaid customers	0,158	0,165	0,173	0,180	0,188
- Quarterly Net Adds	0,008	0,007	0,008	0,007	0,007
- Year on year net growth (in %)	16,2%	18,8%	20,9%	19,8%	18,6%
Prepaid customers	0,122	0,116	0,105	0,106	0,109
- Quarterly Net Adds	-0,011	-0,006	-0,011	0,000	0,003
- Year on year net growth (in %)	-24,4%	-24,7%	-27,9%	-20,7%	-11,0%
Total active customers	0,266	0,267	0,270	0,278	0,284
- as a % of total customers	94,8%	94,9%	96,9%	97,2%	95,9%
- Quarterly Net Adds	0,004	0,002	0,003	0,008	0,006
- Year on year net growth (in %)	1,2%	4,3%	5,9%	6,3%	7,0%

4. Martinique: total customers and total active customers segmentation



	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	0,509	0,513	0,516	0,514	0,521
- Quarterly Net Adds	-0,007	0,004	0,003	-0,002	0,007
- Year on year net growth (in %)	-3,8%	-2,0%	-1,6%	-0,4%	2,3%
Penetration Rate	141,9%	144,5%	145,3%	144,8%	146,8%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,359		0,355		
Postpaid customers	0,356	0,360	0,364	0,369	0,372
- Quarterly Net Adds	0,006	0,004	0,004	0,004	0,004
- Year on year net growth (in %)	5,0%	5,4%	6,0%	5,2%	4,6%
Prepaid customers	0,153	0,153	0,152	0,146	0,149
- Quarterly Net Adds	-0,013	0,000	-0,001	-0,006	0,003
- Year on year net growth (in %)	-19,5%	-15,9%	-16,0%	-12,4%	-2,9%
Total active customers	0,446	0,447	0,451	0,448	0,453
- as a % of total customers	87,6%	87,1%	87,5%	87,2%	86,9%
- Quarterly Net Adds	0,001	0,001	0,004	-0,003	0,005
- Year on year net growth (in %)	-0,3%	1,4%	1,1%	0,9%	1,6%

5. Mayotte: total customers and total active customers segmentation



	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	0,289	0,288	0,286	0,288	0,297
- Quarterly Net Adds	0,022	-0,001	-0,002	0,002	0,008
- Year on year net growth (in %)	4,1%	6,3%	8,4%	8,1%	2,8%
Penetration Rate	103,2%	99,6%	98,9%	99,8%	102,7%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,279		0,289		
Postpaid customers	0,077	0,080	0,082	0,086	0,090
- Quarterly Net Adds	0,007	0,002	0,002	0,003	0,004
- Year on year net growth (in %)	14,7%	17,6%	18,9%	22,1%	16,0%
Prepaid customers	0,211	0,208	0,204	0,203	0,207
- Quarterly Net Adds	0,015	-0,003	-0,004	-0,001	0,004
- Year on year net growth (in %)	0,6%	2,5%	4,6%	3,1%	-2,0%
Total active customers	0,249	0,248	0,250	0,255	0,262
- as a % of total customers	86,3%	86,2%	87,5%	88,3%	88,2%
- Quarterly Net Adds	0,013	-0,001	0,002	0,005	0,007
- Year on year net growth (in %)	-1,8%	-0,5%	3,3%	7,8%	5,1%

6. Réunion: total customers and total active customers segmentation



	Dec-20	March-21	Jun-21	Sept-21	Dec-21
Total customers	0,904	0,908	0,914	0,925	0,933
- Quarterly Net Adds	0,017	0,003	0,006	0,011	0,008
- Year on year net growth (in %)	2,2%	2,5%	3,4%	4,2%	3,2%
Penetration Rate	105,2%	105,8%	106,5%	107,8%	108,7%
<i>Population at January the 1st of previous year (source: Insee)</i>	0,860		0,858		
Postpaid customers	0,829	0,839	0,849	0,864	0,876
- Quarterly Net Adds	0,020	0,009	0,010	0,016	0,012
- Year on year net growth (in %)	6,1%	6,0%	6,2%	6,8%	5,6%
Prepaid customers	0,075	0,069	0,066	0,061	0,057
- Quarterly Net Adds	-0,004	-0,006	-0,003	-0,005	-0,004
- Year on year net growth (in %)	-27,0%	-27,0%	-23,1%	-22,5%	-23,8%
Total active customers	0,889	0,897	0,902	0,914	0,923
- as a % of total customers	98,3%	98,8%	98,7%	98,8%	98,9%
- Quarterly Net Adds	0,016	0,008	0,005	0,012	0,009
- Year on year net growth (in %)	2,4%	3,4%	4,1%	4,7%	3,8%
Adjusted figure					

B. Internet of things: MtoM SIM cards

I. MtoM cards of French operators

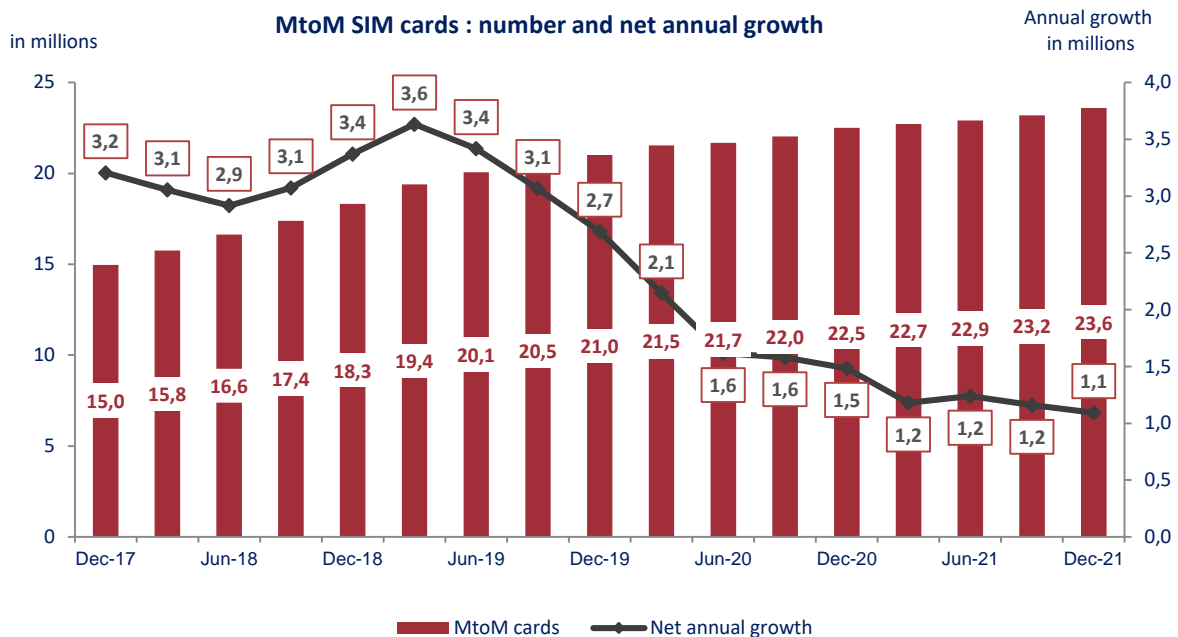
	Dec-20	March-21	Jun-21	Sept-21	Dec-21
MtoM SIM cards	22,505	22,715	22,916	23,201	23,598
- Gross sales for the quarter	0,669	0,683	0,706	0,505	0,549
- Quarterly Net Adds	0,464	0,210	0,200	0,285	0,397
- Year on year net growth (in %)	7,1%	5,5%	5,7%	5,3%	4,9%

1. MtoM cards of French operators - Metropolitan

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
MtoM SIM cards	22,472	22,682	22,884	23,170	23,569
- Quarterly Net Adds	0,465	0,210	0,202	0,286	0,398
- Year on year net growth (in %)	7,1%	5,5%	5,7%	5,3%	4,9%

2. MtoM cards of French operators - Overseas departments

	Dec-20	March-21	Jun-21	Sept-21	Dec-21
MtoM SIM cards	0,033	0,033	0,031	0,030	0,029
- Quarterly Net Adds	-0,001	0,000	-0,002	-0,001	-0,001
- Year on year net growth (in %)	-4,3%	-4,0%	-9,1%	-11,4%	-13,0%



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.