



Telecommunications observatory (mobile market)

1st quarter 2013 - provisional results

Summary:

➤ **National**

- page 3 : customers base and multimedia
- page 4 : customers geographic distribution

➤ **Metropolitan France**

- pages 5 to 6: customers base, multimedia, penetration rate
- page 7: panel of competition
- page 8: metropolitan residential market

➤ **Overseas**

- page 9: customers base
- page 10: Antilles-Guyana
- page 11: Reunion-Mayotte

➤ **Appendix (page 12)**

The figures relating to the sales turnover and the traffic are published within the “Telecommunications Observatory in France” to the following address:

<http://www.arcep.fr/index.php?id=36>

Except opposite mention, indicators are in millions of units.

I. NATIONAL REPORT

Mobile Network Operators (1) and Mobile Virtual Network Operators (1')

31st March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid customers (2)	50,653	52,074	53,457	54,893	56,351
- Quarterly Net Adds (4)	1,634	1,421	1,384	1,436	1,458
- Quarterly net growth as a %	3,3 %	2,8 %	2,7 %	2,7 %	2,7 %
- Year on year net growth (4)	8,2 %	10,0 %	11,1 %	12,0 %	11,2 %

Prepaid customers (2)	18,824	18,387	18,475	18,244	17,319
- Quarterly Net Adds (4)	-0,730	-0,437	0,088	-0,231	-0,925
- Quarterly net growth as a %	-3,7 %	-2,3 %	0,5 %	-1,2 %	-5,1 %
- Year on year net growth (4)	0,7 %	-1,4 %	-2,2 %	-6,7 %	-8,0 %

Total customers (2)	69,477	70,460	71,932	73,137	73,670
- Quarterly Net Adds (4)	0,903	0,984	1,472	1,205	0,533
- Quarterly net growth as a %	1,3 %	1,4 %	2,1 %	1,7 %	0,7 %
- Year on year net growth (4)	6,1 %	6,8 %	7,4 %	6,7 %	6,0 %

Penetration Rate (5)	106,5%	108,0%	110,2%	112,1%	112,4%
Population at January the 1 st of previous year (source: INSEE)	65,259	65,259	65,259	65,259	65,551

Active customers*(7)	67,093	67,868	69,163	70,476	70,905
- as a % of total customers	96,6 %	96,3 %	96,2 %	96,4 %	96,2 %
- Quarterly Net Adds (4)	0,768	0,774	1,295	1,313	0,429
- Quarterly net growth as a %	1,2 %	1,2 %	1,9 %	1,9 %	0,6 %
- Year on year net growth (4)	5,8 %	6,2 %	6,4 %	6,3 %	5,7 %

Active Penetration Rate (5)	102,8%	104,0%	106,0%	108,0%	108,2%
Population at January the 1 st of previous year (source: INSEE)	65,259	65,259	65,259	65,259	65,551

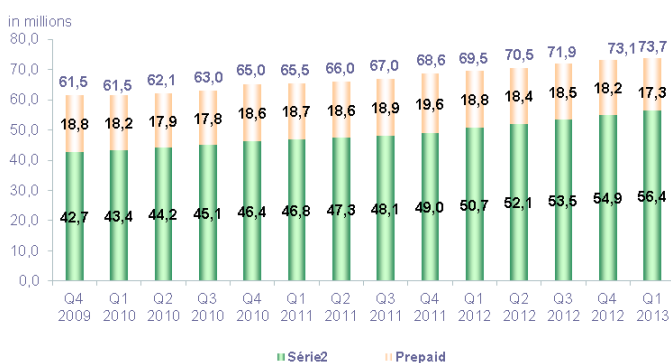
* Obtained by extrapolation to all operators of the data given by operators declaring more than 50 000 customers

SMS traffic - National

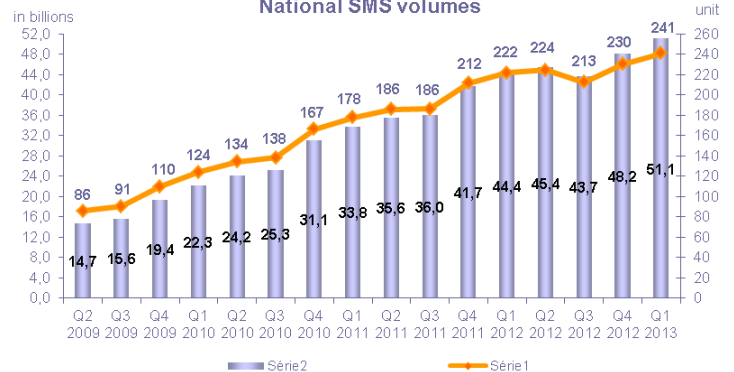
	March-12	June-12	Sept-12	Dec-12	March-13
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SMS traffic in billions of units (13)	44,372	45,426	43,725	48,239	51,099
- Quarterly growth in billions of units (4)	2,643	1,054	-1,702	4,515	2,860
- Quarterly growth as a %	6,3 %	2,4 %	-3,7 %	10,3 %	5,9 %
- Year on year growth (4)	31,2 %	27,7 %	21,3 %	15,6 %	15,2 %
Average monthly SMS Traffic per active customers (13)	222	224	213	230	241

Number of mobile national customers



National SMS volumes



**I. 2. Customers geographic distribution (8)
Metropolitan MNOs (1) and MVNOs (1')
March, 31th 2013**

County	Population at January, the 1st 2012	County penetration rate* March 2013	County penetration rate* June 2013	County penetration rate* September 2013	County penetration rate* December 2013
Alsace	1,857	101,3%			
Aquitaine	3,287	99,9%			
Auvergne	1,353	82,1%			
Basse-Normandie	1,480	83,2%			
Bourgogne	1,647	87,8%			
Bretagne	3,250	81,0%			
Centre	2,562	94,6%			
Champagne-Ardenne	1,333	97,9%			
Corse	0,317	101,8%			
Franche-Comté	1,179	84,2%			
Haute-Normandie	1,851	95,9%			
Ile-de-France	11,915	172,2%			
Languedoc-Roussillon	2,686	99,5%			
Limousin	0,746	87,8%			
Lorraine	2,357	98,8%			
Midi-Pyrénées	2,929	98,3%			
Nord-Pas-De-Calais	4,050	103,2%			
Pays de la Loire	3,630	87,0%			
Picardie	1,925	88,4%			
Poitou-Charentes	1,790	86,6%			
PACA	4,924	132,1%			
Rhône-Alpes	6,342	101,8%			
Total	63,409	112,0%			

* Obtained by extrapolation to all operators of the data given by operators declaring more than 50 000 customers

**I. 3. Customers geographic distribution (8)
Overseas MNOs (1)
March, 31th 2013**

County	Population at January, the 1st 2012	County penetration rate March 2013	County penetration rate June 2013	County penetration rate September 2013	County penetration rate December 2013
Guadeloupe	0,451	153,7%			
Martinique	0,390	147,5%			
Guyane	0,239	124,7%			
Mayotte	0,217	89,8%			
Réunion	0,838	107,2%			
Saint Pierre et Miquelon	0,006	61,3%			
Total	2,142	124,4%			

II. 1. METROPOLITAN REPORT

Mobile Network Operators (1) and Mobile Virtual Network Operators (1')

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid customers (2)	49,302	50,713	52,081	53,594	55,035
- Quarterly gross sales (3)	5,237	3,914	3,806	4,472	4,280
- Quarterly Net Adds (4)	1,621	1,411	1,368	1,513	1,441
- Quaterly net growth as a %	3,4%	2,9%	2,7%	2,9%	2,7%
- Year on year net growth (4)	8,3%	10,1%	11,3%	12,4%	11,6%

Prepaid customers (2)	17,513	17,075	17,160	16,895	15,970
- Quarterly gross sales (3)	2,388	2,704	2,744	2,700	2,113
- Quarterly Net Adds (4)	-0,724	-0,438	0,085	-0,265	-0,925
- Quaterly net growth as a %	-4,0%	-2,5%	0,5%	-1,5%	-5,5%
- Year on year net growth (4)	0,5%	-1,7%	-2,5%	-7,4%	-8,8%

Total customers (2)	66,815	67,788	69,241	70,489	71,005
among which Internet SIM card	3,161	3,242	3,313	3,374	3,410
among which M2M SIM card	3,528	3,907	4,372	4,663	5,292
- Quarterly Net Adds (4)	0,896	0,973	1,453	1,248	0,516
- Quaterly net growth as a %	1,4%	1,5%	2,1%	1,8%	0,7%
- Year on year net growth (4)	6,1%	6,9%	7,5%	6,9%	6,3%

Penetration Rate (5)	105,8%	107,4%	109,7%	111,7%	112,0%
Population at January the 1st of previous year (source: INSEE)	63,128	63,128	63,128	63,128	63,409

Customers not under commitment contract* (6)	29,358	30,557	32,569	34,567	35,970
- post-paid customers not under commitment contract	11,846	13,482	15,409	17,672	20,000
- % of post-paid customers not under commitment contract	24,0%	26,6%	29,6%	33,0%	36,3%

Active customers*(7)	64,741	65,517	66,790	68,176	68,599
- as a % of total customers	96,9%	96,6%	96,5%	96,7%	96,6%
- Quarterly Net Adds (4)	0,766	0,776	1,273	1,386	0,423
- Quaterly net growth as a %	1,2%	1,2%	1,9%	2,1%	0,6%
- Year on year net growth (4)	5,9%	6,3%	6,5%	6,6%	6,0%

Active Penetration Rate (5)	102,6%	103,8%	105,8%	108,0%	108,2%
Population at January the 1st of previous year (source: INSEE)	63,128	63,128	63,128	63,128	63,409

Active mobile multimedia clients - Metropolitan

	March-12	June-12	Sept-12	Dec-12	March-13
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Active mobile multimedia clients* (12)	30,938	32,274	32,387	34,012	34,091
- as a % of total active customers	47,8%	49,3%	48,5%	49,9%	49,7%
- Quarterly Net Adds (4)	0,377	1,336	0,113	1,625	0,078
- Quaterly net growth as a %	1,2%	4,3%	0,4%	5,0%	0,2%
- Year on year net growth	10,8%	10,5%	11,3%	11,3%	10,2%

SMS Traffic - Metropolitan

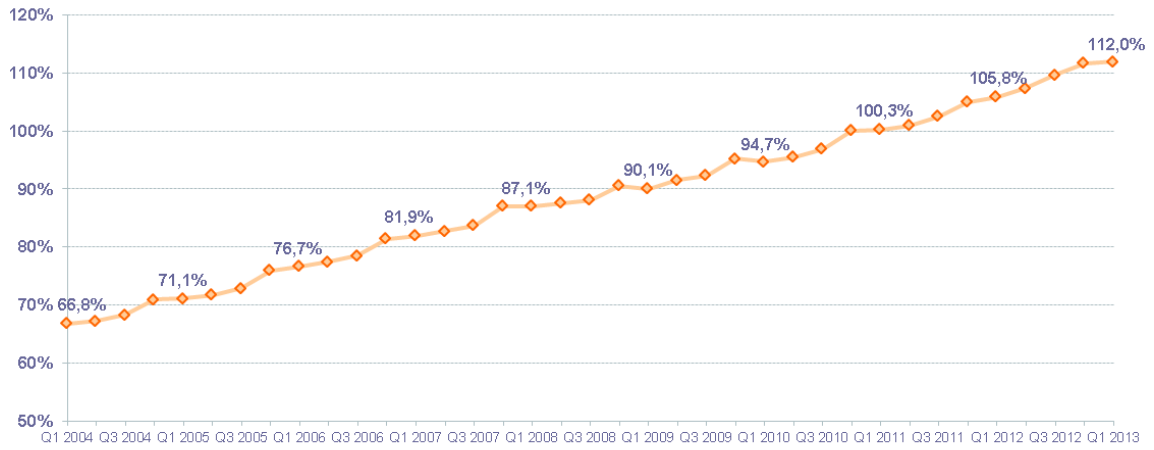
	March-12	June-12	Sept-12	Dec-12	March-13
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SMS traffic in billions of units (13)	43,217	44,244	42,505	46,932	49,813
- Quarterly growth in billions of units (4)	2,587	1,028	-1,739	4,427	2,881
- Quaterly growth as a %	6,4%	2,4%	-3,9%	10,4%	6,1%
- Year on year growth (4)	31,4%	27,9%	21,3%	15,5%	15,3%
Average monthly SMS Traffic per active customers (13)	224	226	214	232	243

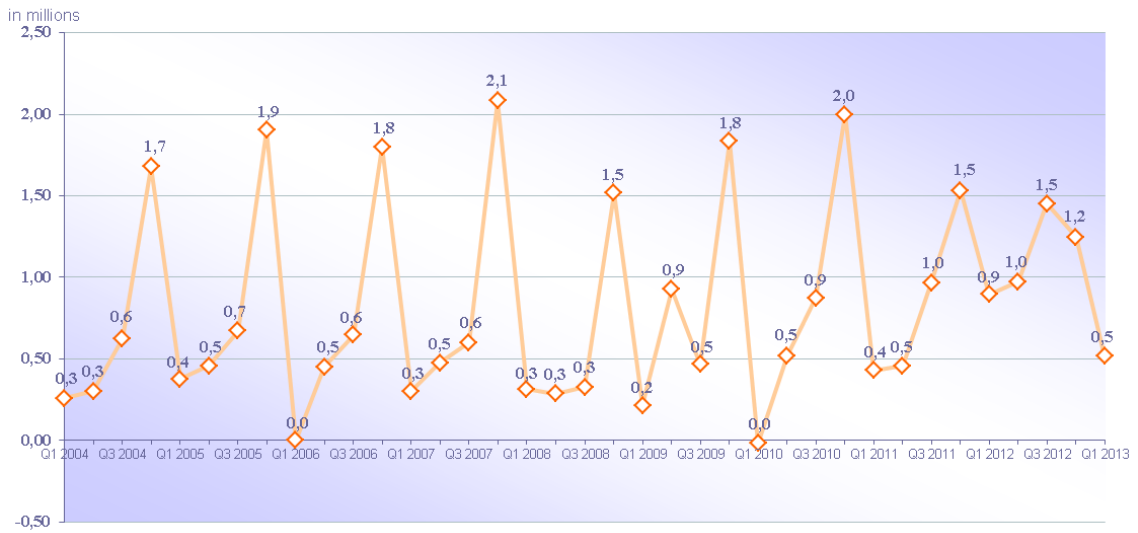
* Obtained by extrapolation to all operators of the data given by operators declaring more than 50 000 customers

Adjusted figures

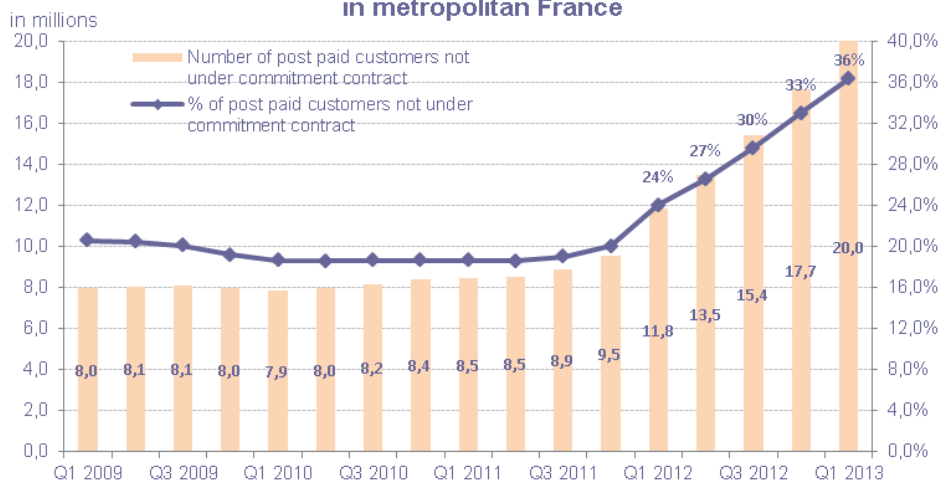
Mobile telephone penetration rate in metropolitan France



Quarterly net mobile telephony growth in metropolitan France



Post-paid customers not under commitment contract in metropolitan France



II. 2. METROPOLITAN COMPETITION REPORT
Mobile Network Operators (1) and Mobile Virtual Network Operators (1')
 31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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MNOs	59,368	60,063	61,443	62,813	63,301
- Among which postpaid customers	45,974	47,223	48,571	49,983	51,308
- Quarterly Net Adds (4)	0,943	0,695	1,380	1,369	0,489
- Quaterly net growrh as a %	1,6%	1,2%	2,3%	2,2%	0,8%
- Year on year net growth (4)	2,8%	4,5%	6,8%	7,5%	6,6%

MVNOs	7,447	7,725	7,798	7,676	7,703
- Quarterly Net Adds (4)	-0,047	0,277	0,073	-0,121	0,027
- Quaterly net growrh as a %	-0,6%	3,7%	0,9%	-1,6%	0,4%
- Year on year net growth (4)	42,6%	29,9%	13,9%	2,4%	3,4%

MVNO Market share	11,1%	11,4%	11,3%	10,9%	10,8%
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MVNO Market share of gross postpaid sales (9)	7,2%	10,5%	9,0%	9,2%	9,4%
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MVNO Market share of gross prepaid sales (9)	38,9%	46,1%	43,6%	41,8%	43,9%
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Quaterly postpaid cancellation rate (10)	7,5%	5,0%	4,7%	5,7%	5,3%
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Quaterly prepaid cancellation rate (10)	17,4%	18,2%	15,5%	17,1%	18,1%
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Numbers ported during the quarter	2,637	1,343	1,293	1,828	1,851
- Year on year growth (4)	231,7%	85,6%	74,6%	80,6%	-29,8%

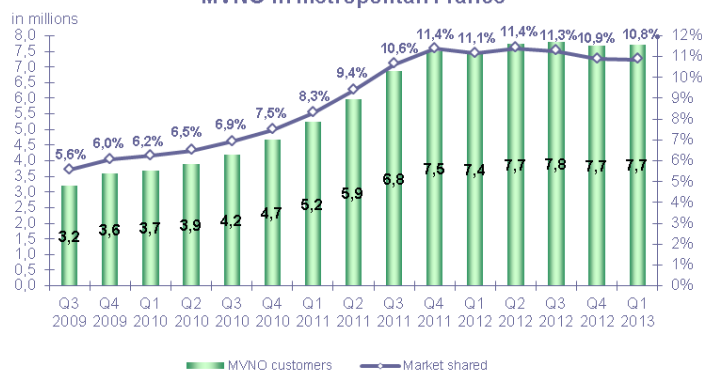
Adjusted figures

Not relevant growths (integration of the customers of La Poste Telecom formerly Débitel in the MVNOs market)

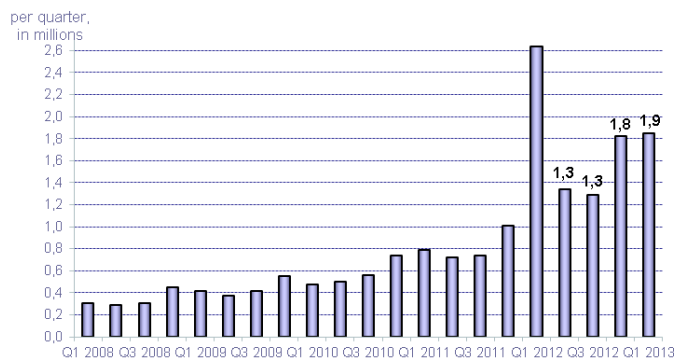
Not relevant growths (integration of the customers of Carrefour Mobile, Darty Mobile and KPN France in the MNOs market)

Not relevant growths (integration of the customers of Futur Telecom in the MVNOs market)

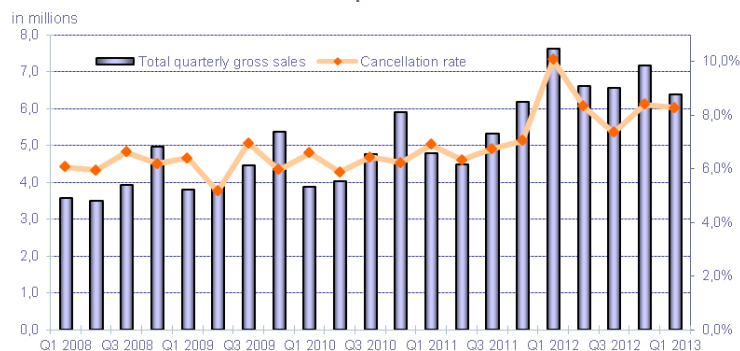
MVNO in metropolitan France



Numbers ported in metropolitan France



Gross sales and cancellation rate in metropolitan France



II. 3. METROPOLITAN REPORT - RESIDENTIAL MARKET

Mobile Network Operators (1) and Mobile Virtual Network Operators (1')

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid residential customers (2)	38,511	39,485	40,343	41,520	42,313
- Quarterly gross sales (3)	4,629	3,171	2,997	3,712	3,278
- Quarterly Net Adds (4)	1,388	0,974	0,858	1,177	0,793
- Quaterly net growrh as a %	3,7%	2,5%	2,2%	2,9%	1,9%
- Year on year net growth (4)	7,6%	9,6%	10,4%	11,8%	9,9%

Prepaid residential customers (2)	17,513	17,075	17,160	16,895	15,970
- Quarterly gross sales (3)	2,388	2,704	2,744	2,700	2,113
- Quarterly Net Adds (4)	-0,724	-0,438	0,085	-0,265	-0,925
- Quaterly net growrh as a %	-4,0%	-2,5%	0,5%	-1,5%	-5,5%
- Year on year net growth (4)	0,5%	-1,7%	-2,5%	-7,4%	-8,8%

Total residential customers (2)	56,024	56,560	57,503	58,415	58,283
<i>among which Internet SIM card</i>	2,107	2,160	2,221	2,264	2,290
- Quarterly Net Adds (4)	0,664	0,536	0,943	0,912	-0,132
- Quaterly net growrh as a %	1,2%	1,0%	1,7%	1,6%	-0,2%
- Year on year net growth (4)	5,3%	5,9%	6,2%	5,5%	4,0%

Adjusted figures

II. 4. METROPOLITAN COMPETITION REPORT - RESIDENTIAL MARKET

Mobile Network Operators (1) and Mobile Virtual Network Operators (1')

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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MNOs	48,643	48,907	49,783	50,822	50,737
- Quarterly Net Adds (4)	0,716	0,264	0,876	1,039	-0,084
- Quaterly net growrh as a %	1,5%	0,5%	1,8%	2,1%	-0,2%
- Year on year net growth (4)	1,2%	3,0%	5,1%	6,0%	4,3%

MVNOs	7,382	7,653	7,720	7,593	7,546
- Quarterly Net Adds (4)	-0,052	0,272	0,067	-0,127	-0,048
- Quaterly net growrh as a %	-0,7%	3,7%	0,9%	-1,6%	-0,6%
- Year on year net growth (4)	42,7%	29,8%	13,7%	2,1%	2,2%

MVNO Market share	13,2%	13,5%	13,4%	13,0%	12,9%
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MVNO Market share of gross postpaid sales (9)	8,0%	12,7%	11,2%	10,8%	11,9%
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MVNO Market share of gross prepaid sales (9)	38,9%	46,1%	43,6%	41,8%	43,9%
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Quaterly postpaid cancellation rate (10)	8,6%	5,6%	5,4%	6,4%	6,1%
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Quaterly prepaid cancellation rate (10)	17,4%	18,2%	15,5%	17,1%	18,1%
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Numbers ported during the quarter	2,483	1,238	1,219	1,720	1,765
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Adjusted figures

Not relevant growths (integration of the customers of La Poste Telecom formerly Débitel in the MVNOs market)

Not relevant growths (integration of the customers of Carrefour Mobile, Darty Mobile and KPN France in the MNOs market)

III. 1. OVERSEAS REPORT : DOM, Saint-Martin, Saint-Barthélemy, Mayotte, Saint-Pierre-et-Miquelon Mobile Network Operators (1)

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid customers (2)	1,351	1,361	1,376	1,299	1,316
- Quarterly Net Adds (4)	0,013	0,010	0,016	-0,077	0,017
- Quaterly net growrh as a %	1,0%	0,8%	1,1%	-5,6%	1,3%
- Year on year net growth (4)	5,2%	4,9%	5,4%	-2,9%	-2,6%

Prepaid customers (2)	1,311	1,312	1,315	1,349	1,349
- Quarterly Net Adds (4)	-0,006	0,001	0,003	0,035	0,000
- Quaterly net growrh as a %	-0,5%	0,1%	0,2%	2,6%	0,0%
- Year on year net growth (4)	4,7%	3,6%	0,8%	2,5%	2,9%

Total customers (2)	2,661	2,673	2,691	2,648	2,665
- Quarterly Net Adds (4)	0,007	0,011	0,019	-0,043	0,017
- Quaterly net growrh as a %	0,3%	0,4%	0,7%	-1,6%	0,6%
- Year on year net growth (4)	5,0%	4,2%	3,1%	-0,2%	0,1%

Penetration Rate (5)	124,9%	125,4%	126,3%	124,2%	124,4%
Population at January the 1st of previous year (source: INSEE)	2,131	2,131	2,131	2,131	2,142

Active customer (7)	2,352	2,351	2,373	2,300	2,306
- as a % of total active customers	88,4%	88,0%	88,2%	86,9%	86,5%
- Quarterly Net Adds (4)	0,002	-0,002	0,022	-0,073	0,006
- Quaterly net growrh as a %	0,1%	-0,1%	1,0%	-3,1%	0,2%
- Year on year net growth	2,8%	2,7%	2,3%	-2,1%	-2,0%

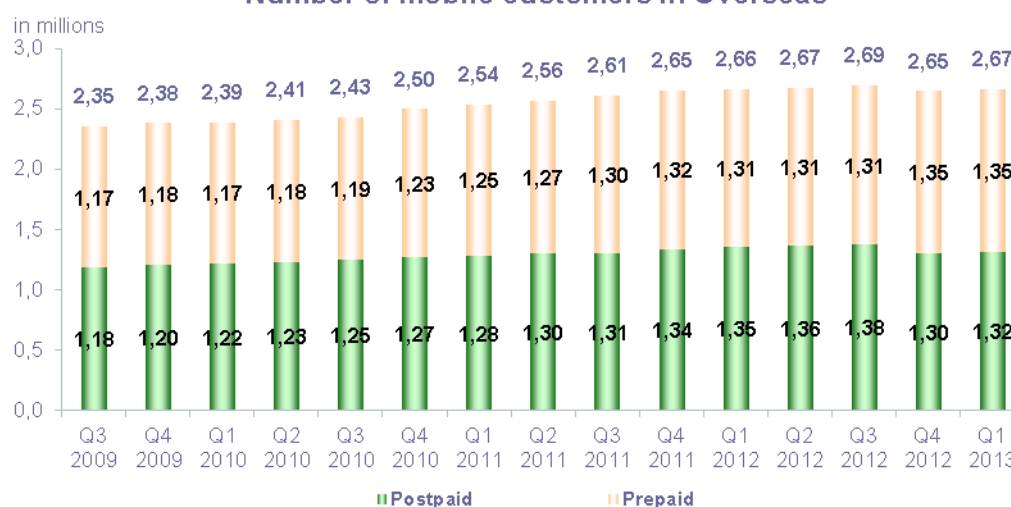
Active Penetration Rate (5)	110,4%	110,3%	111,3%	107,9%	107,6%
Population at January the 1st of previous year (source: INSEE)	2,131	2,131	2,131	2,131	2,142

SMS Traffic - Overseas

	March-12	June-12	Sept-12	Dec-12	March-13
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SMS traffic in billions of units (13)	1,156	1,182	1,220	1,308	1,286
- Quarterly growth in billions of units (4)	0,056	0,026	0,038	0,088	-0,021
- Quaterly growrh as a %	5,0%	2,3%	3,2%	7,2%	-1,6%
- Year on year growth (4)	23,9%	23,5%	21,1%	18,9%	11,3%
Average monthly SMS Traffic per active customers (13)	164	168	172	187	186

Number of mobile customers in Overseas



III. 2. OVERSEAS REPORT : ANTILLES-GUYANE Mobile Network Operators (1)

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid customers (2)	0,744	0,749	0,759	0,701	0,716
- Quarterly Net Adds (4)	0,009	0,005	0,010	-0,058	0,015
- Quaterly net growrh as a %	1,3%	0,7%	1,3%	-7,6%	2,1%
- Year on year net growth (4)	4,8%	4,6%	5,3%	-4,6%	-3,8%

Prepaid customers (2)	0,800	0,804	0,812	0,841	0,852
- Quarterly Net Adds (4)	-0,003	0,004	0,008	0,029	0,011
- Quaterly net growrh as a %	-0,3%	0,5%	1,1%	3,5%	1,3%
- Year on year net growth (4)	10,2%	7,6%	2,8%	4,7%	6,5%

Total customers (2)	1,544	1,553	1,571	1,542	1,568
- Quarterly Net Adds (4)	0,007	0,009	0,018	-0,029	0,026
- Quaterly net growrh as a %	0,4%	0,6%	1,2%	-1,9%	1,7%
- Year on year net growth (4)	7,5%	6,1%	4,0%	0,3%	1,5%

Penetration Rate (5)	142,8%	143,6%	145,3%	142,6%	145,0%
Population at January the 1st of previous year (source: INSEE)	1,081	1,081	1,081	1,081	1,081

Active customer (7)	1,325	1,325	1,344	1,286	1,306
- as a % of total active customers	85,8%	85,3%	85,5%	83,4%	83,3%
- Quarterly Net Adds (4)	0,001	0,000	0,019	-0,058	0,020
- Quaterly net growrh as a %	0,0%	0,0%	1,4%	-4,3%	1,6%
- Year on year net growth	4,7%	4,1%	3,1%	-2,9%	-1,4%

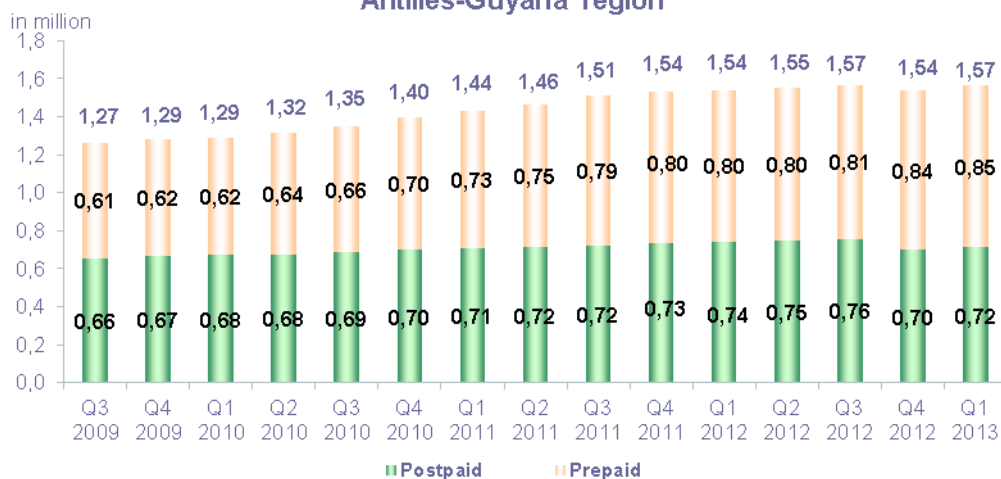
Active Penetration Rate (5)	122,5%	122,5%	124,3%	118,9%	120,8%
Population at January the 1st of previous year (source: INSEE)	1,081	1,081	1,081	1,081	1,081

SMS Traffic - Overseas (ANTILLES-GUYANE)

	March-12	June-12	Sept-12	Dec-12	March-13
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SMS traffic in billions of units (13)	0,455	0,479	0,477	0,520	0,517
- Quarterly growth in billions of units (4)	0,031	0,024	-0,001	0,043	-0,004
- Quaterly growth as a %	7,3%	5,3%	-0,3%	9,0%	-0,7%
- Year on year growth (4)	38,7%	38,8%	30,7%	22,8%	13,7%
Average monthly SMS Traffic per active customers (13)	114	120	119	132	133

Number of mobile customers in Overseas : Dependencies Antilles-Guyana region



III. 3. OVERSEAS REPORT : REUNION-MAYOTTE

Mobile Network Operators (1)

31th March 2013

	March-12	June-12	Sept-12	Dec-12	March-13
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Postpaid customers (2)	0,604	0,609	0,615	0,595	0,598
- Quarterly Net Adds (4)	0,004	0,005	0,006	-0,019	0,002
- Quaterly net growrh as a %	0,7%	0,8%	1,0%	-3,2%	0,4%
- Year on year net growth (4)	5,8%	5,2%	5,4%	-0,8%	-1,1%

Prepaid customers (2)	0,509	0,507	0,501	0,507	0,496
- Quarterly Net Adds (4)	-0,003	-0,003	-0,006	0,006	-0,011
- Quaterly net growrh as a %	-0,7%	-0,5%	-1,1%	1,2%	-2,2%
- Year on year net growth (4)	-2,9%	-2,2%	-2,3%	-1,1%	-2,6%

Total customers (2)	1,114	1,116	1,116	1,102	1,093
- Quarterly Net Adds (4)	0,000	0,002	0,000	-0,014	-0,009
- Quaterly net growrh as a %	0,0%	0,2%	0,0%	-1,2%	-0,8%
- Year on year net growth (4)	1,6%	1,7%	1,8%	-1,0%	-1,8%

Penetration Rate (5)	106,7%	106,9%	106,9%	105,6%	103,7%
Population at January the 1st of previous year (source: INSEE)	1,044	1,044	1,044	1,044	1,055

Active customer (7)	1,024	1,022	1,025	1,005	0,992
- as a % of total active customers	91,9%	91,6%	91,9%	91,1%	90,7%
- Quarterly Net Adds (4)	0,002	-0,002	0,003	-0,021	-0,013
- Quaterly net growrh as a %	0,2%	-0,2%	0,3%	-2,0%	-1,3%
- Year on year net growth	0,5%	0,9%	1,3%	-1,7%	-3,1%

adjusted figure

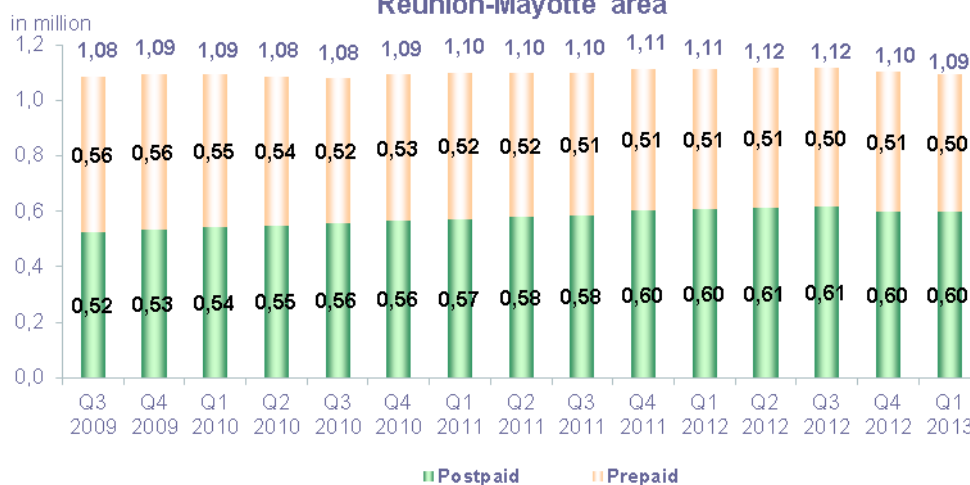
Active Penetration Rate (5)	98,1%	97,9%	98,3%	96,3%	94,1%
Population at January the 1st of previous year (source: INSEE)	1,044	1,044	1,044	1,044	1,055

SMS Traffic - Overseas (REUNION-MAYOTTE)

	March-12	June-12	Sept-12	Dec-12	March-13
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SMS traffic in billions of units (13)	0,701	0,703	0,742	0,787	0,770
- Quarterly growth in billions of units (4)	0,025	0,002	0,039	0,045	-0,018
- Quaterly growrh as a %	3,6%	0,3%	5,5%	6,0%	-2,2%
- Year on year growth (4)	15,9%	14,9%	15,6%	16,4%	9,8%
Average monthly SMS Traffic per active customers (13)	228	229	242	258	257

Number of mobile customers in Overseas : Dependencies Réunion-Mayotte area



Appendix

The references in the tables refer to the following notes:

(1) Metropolitan mobile network operators (MNOs): Bouygues Telecom, Free Mobile, Orange France, Société Française du Radiotéléphone (SFR) and active MVNOs controlled by network operators: BuzzMobile, Carrefour mobile, Darty Mobile, E-plus (KPN France), France Télécom and SNBL.

Overseas mobile network operators : Orange Caraïbe, subsidiary of Orange France; Orange Réunion, subsidiary of Orange France; Société Réunionnaise du Radiotéléphone (SRR), including under the Mayotte Télécom Mobile brand in Mayotte, subsidiary of SFR; Digicel AFG; SAS SPM, subsidiary of Orange Caraïbe in Saint-Pierre-et-Miquelon; Dauphin Telecom; Outremer Telecom.

(1') Metropolitan MVNOs independent of mobile operators and active during the quarter : Afone, Auchan Telecom, Bazile Telecom, Coriolis Telecom, Futur Telecom, IC Telecom, La Poste Telecom, Lebara mobile, Legos, Lycamobile, Mobeel, NRJ Mobile, Numericable, Omer mobile, Omer Telecom, Ortel Mobile, Pritel, SCT Telecom, Sim +, Sisteer, Symacom, Transatel, Zéro forfait.

(2) A client is considered to be any user of a mobile service provided by an operator (MNO or MVNO) and having a mobile line registered with an operator's Home Location Register (HLR) at the date in question. Due to misuse of language, the term "client" also refers to the mobile line itself. So, for business clients, each line is considered a client. Post-paid clients 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.

(3) Gross sales are the operator's clients at the end of the quarter which are registered with the HLR 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.

(4) Net growth data for the quarter are calculated as the difference in the number of clients between the beginning and end of the quarter. Year-on-year growth is obtained by comparing the numbers of clients of two ends of quarters one year apart to the end of the first quarter in question.

(5) The penetration rate is obtained by dividing the total number of clients or the number of "active" clients by the population in question. The MIM publication of December 2006 updated the populations resulting from INSEE's ten-year census of 1st January 1999. From now on, the reference population is that published by INSEE on 1st January of the year in question, with no retroactive updating. On 1st January of year N, INSEE publishes its population estimates for 1st January of the year N-1. So, the reference population for 2013, taken from the estimates published on 1st January 2013 (and therefore on 1st January 2012), is a Metropolitan population of 63 409 191, to which are added a population of 2 242 271 for the DOM and COM, broken down as 1 081 000 inhabitants for the Antilles-Guyana area and 1 054 959 for the Réunion-Mayotte area. The Mayotte population of January 1st, 2011 results from an estimation of the World Bank.

(6) 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.

(7) The number of active clients equals 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 or used a multimedia (e-mail, etc.) service during the past three months (not including incoming SMS).

(8) A client's registration region is that of the Metropolitan administrative region in which the client was registered from the operator's point of view. For post-paid clients, this is the region of the invoicing address.

(9) The market share of MVNOs in gross post-paid sales is the ratio as a percentage of gross sales made by the MVNOs during the quarter to total post-paid gross for the same quarter. The market share of MVNOs in gross pre-paid sales is the ratio as a percentage of gross pre-paid sales made by the MVNOs during the quarter to total gross pre-paid sales for the same quarter.

(10) The quarterly post-paid cancellation rate is the ratio of post-paid cancellations during the quarter to the average number of post-paid clients during the period (½ sum of post-paid numbers at the beginning and end of the quarter). The quarterly pre-paid cancellation rate is the ratio between pre-paid cancellations during the quarter and the average number of pre-paid clients during the period (½ sum of pre-paid clients at the beginning and end of the quarter). Note that a cancellation is defined as an operator's client at the beginning of the quarter whose registration in the HLR was deleted during the quarter. Modifications to the registration in the HLR 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.

(11) The 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.

(12) The active number of multimedia clients is defined as all clients having used a multimedia service such as internet mobile at least once during the past month or, having sent an MMS or mobile e-mail (this does not include SMS), regardless of the support technology (CSD, GPRS, EDGE, UMTS, etc.).

(13) Quarterly SMS (Short Message Service) traffic corresponds to all SMS sent (outgoing SMS) during the quarter. Average monthly SMS traffic per active client equals quarterly SMS traffic divided by 3, divided by the average number of active clients ((number of active clients at the end of the previous quarter + number of active clients at the end of the quarter in question)/2).