



Telecommunications observatory (mobile market)

1st quarter 2015

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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” to the following address: <http://www.arcep.fr/index.php?id=36>

Except opposite mention, indicators are in millions of units.

Changes made to scoreboard publications

I. Separation of classic SIM card and MtoM card indicators

MtoM SIM cards, which are typically used to enable two remote machines to “talk” to one another, is one aspect of the Internet of Things (IoT) that is tied directly to the mobile business. These cards are employed, for instance, to trace objects and work tools (fleets of vehicles, machines, etc.), to obtain updated information (remote meter readers, sensor data collection, etc.), to perform all manner of identification, monitoring or surveillance job (alarms, remote service call, etc.). The use made of and revenue generated by these cards are very different from classic SIM cards. Among other things, there are tremendous disparities in the realm of competition, particularly as concerns contract lengths, companies competing in the marketplace, etc.

In the indicators published up until now (see complete list below), these MtoM cards were not separated from the SIM cards installed in mobile phones, tablets and computers. As the use of MtoM continues to expand, and certain indicators – such as penetration rates – become increasingly difficult to interpret as a result, **ARCEP will henceforth separate data relating to these two types of cards in its publications.**

The indicators affected by this change:

- For the national scoreboard, the total number of cards and penetration rates are now presented only excluding MtoM cards. Previously, there had been two versions of these indicators: excluding and including MtoM. Moreover, the total active base is now calculated excluding MtoM cards.
- For the national scoreboard for Metropolitan France, the total base, the penetration rate and the total active base, the total base and the base of post-paid network operators, MVNOs’ total base, MVNOs’ penetration rate and gross post-paid sales, and the cancellation rate for post-paid plans are now presented excluding MtoM cards.
- For the scoreboard for French overseas markets, the total base, the penetration rate and the total active base are now presented excluding MtoM cards.

The datasets listed above are provided including and excluding MtoM cards on page 14 (Appendix 1) of this publication, whenever relevant.

II. Addition of indicators on data-only cards and on the enterprise market

Two types of indicator have been added to the publication. They are provided only for the market in Metropolitan France:

- Data-only SIM cards are now broken down into post-paid and prepaid (aka pay-as-you-go) cards. Operators sell these cards either as flat rate plans or prepaid contracts, and they can only be used for data traffic.
- To provide an exhaustive scorecard for the mobile services market in Metropolitan France, ARCEP will also publish indicators on the business segment on a quarterly basis. In previous publications, only residential market figures were published.

III. Breakdown of the French overseas market by department

In previous publications, indicators for French overseas departments and collectivities were published by region (Antilles-Guyana, Reunion/Mayotte), and included a breakdown of the total base by department. From hereon in, all of the indicators (penetration rate, post and prepaid base, total active base) will be provided for each department.

Principaux résultats

The first part of this document (A) deals only with the conventional SIM cards market (MtoM cards excluded). The second part (B) is specifically devoted to the market of MtoM cards. The appendix 1 present an historical comparison of the two series (excluding and including MtoM cards).

A titre d'information, le nombre total de cartes SIM sur le marché français y compris les cartes MtoM, s'élève à 80,0 millions à fin mars 2015. La croissance est de 2,5 millions de cartes en un an et de 118 000 sur le trimestre. Dans la suite du document, les cartes SIM classiques et MtoM ne sont plus agrégées.

Baisse du nombre de cartes SIM classiques au premier trimestre 2015.

Au 31 mars 2015, le nombre de cartes SIM (hors MtoM) en service en France s'élève à 71,3 millions, en baisse de 361 000 cartes par rapport au 31 décembre 2014. En évolution annuelle, le nombre de cartes augmente néanmoins de 1,1 million, soit un rythme plus faible qu'en 2014 (+1,5% au premier trimestre 2015 contre +3% en moyenne en 2014). Le nombre de cartes actives (68,5 millions) baisse de 85 000 cartes par rapport au précédent trimestre et confirme la progression du taux d'activité (96,1%, soit +0,4 point par rapport à décembre 2014).

La croissance du nombre de forfaits est plus faible avec une progression de 414 000 cartes sur le trimestre contre un peu plus de 700 000 en moyenne en 2014. Par ailleurs, la baisse du nombre de cartes prépayées s'est nettement accentuée sur les deux derniers trimestres (-775 000 au premier trimestre 2015 après -532 000 au quatrième trimestre 2014 contre -28 000 au troisième trimestre 2014). Enfin, le nombre de cartes SIM internet, en croissance jusqu'ici, recule de 161 000 au premier trimestre 2015 en métropole, que ce soit sur le segment des cartes post-payées ou celui des prépayées.

En métropole, 61,4 millions de cartes en service sont souscrites auprès des opérateurs de réseau, et 7,2 millions auprès d'opérateurs virtuels (MVNO). Le recul du nombre de cartes touche dans les mêmes proportions les opérateurs de réseau et les MVNO. De fait, la part de marché des MVNO est stable par rapport au trimestre précédent (10,5%, -0,1 point).

Le nombre de cartes SIM sur le marché résidentiel diminue en métropole (60,8 millions au 31 mars 2015 en baisse de 445 000 par rapport au 31 décembre 2014) et ce après une augmentation continue depuis le milieu de l'année 2013. A contrario, sur le marché des entreprises le nombre de cartes reste croissant (+84 000 cartes sur le trimestre).

La part des forfaits résidentiels libres d'engagement, c'est-à-dire les abonnements souscrits sans durée d'engagement et ceux dont la période d'engagement est terminée, progresse de 2,3 points en un trimestre et de 8,2 points en un an (58,5%).

Dans les départements et collectivités d'outre-mer, le nombre de cartes SIM en service est stable (2,7 millions au 31 mars 2015).

Forte croissance du nombre de cartes MtoM

Le nombre de cartes MtoM atteint 8,7 millions au 31 mars 2015. L'accroissement trimestriel, +479 000 cartes, est plus vif qu'en 2014 où il était en moyenne d'environ +350 000. Le rythme de croissance annuelle reste fort avec environ +1,5 million sur les quatre derniers trimestres.

A - Mobiles services market - MtoM SIM cards excluded

I. NATIONAL REPORT - total customers and active customers

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	70,251	70,669	71,357	71,672	71,311
- Quarterly Net Adds	0,341	0,418	0,688	0,315	-0,361
- Year on year net growth (in %)	2,8%	2,9%	3,3%	2,5%	1,5%

Penetration Rate	106,8%	107,4%	108,5%	108,9%	107,9%
Population at January the 1 st of previous year (source: INSEE)	65,795				66,070

Postpaid customers	54,951	55,594	56,310	57,158	57,572
- Quarterly Net Adds	0,707	0,643	0,716	0,847	0,414
- Year on year net growth (in %)	7,7%	6,8%	6,0%	5,4%	4,8%

Prepaid customers	15,299	15,074	15,047	14,515	13,739
- Quarterly Net Adds	-0,365	-0,225	-0,028	-0,532	-0,775
- Year on year net growth (in %)	-11,6%	-9,4%	-5,6%	-7,3%	-10,2%

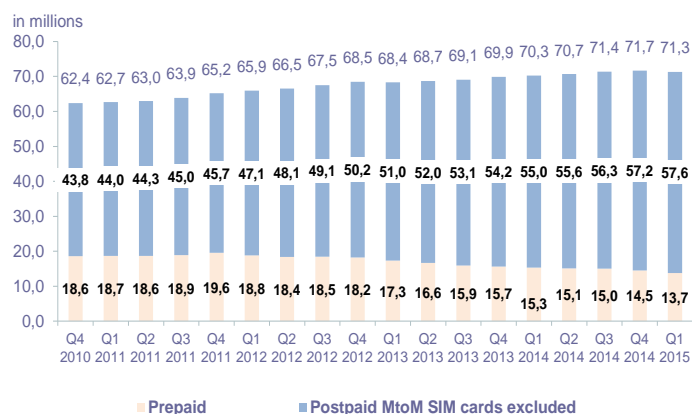
	March-14	June-14	Sept-14	Dec-14	March-15
Total active customers	66,982	67,544	68,228	68,585	68,501
- as a % of total customers	95,3%	95,6%	95,6%	95,7%	96,1%
- Quarterly Net Adds	-0,034	0,562	0,684	0,357	-0,085
- Year on year net growth (in %)	2,2%	2,6%	3,0%	2,3%	2,3%

Adjusted figures

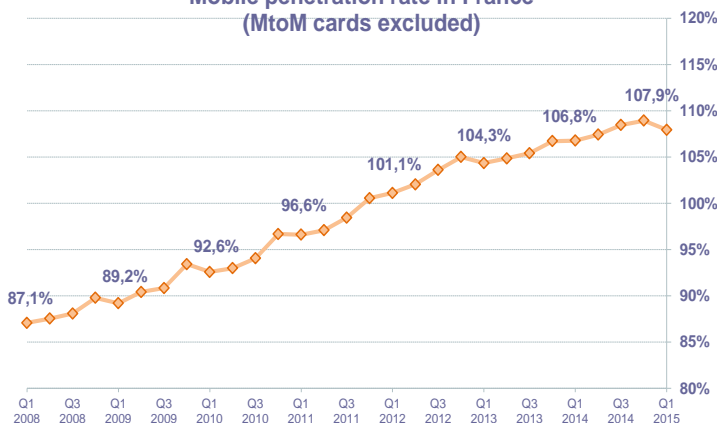
All the indicators are now excluding MtoM SIM cards (see Appendix 1):

- "total customers" and "penetration rate" indicators are calculated MtoM SIM cards excluded. They already appeared in previous publications (indicators "of which total customers MtoM SIM cards excluded" and "penetration rate MtoM SIM cards excluded");
- the indicators "total customers MtoM SIM cards included" and "penetration rate MtoM SIM cards included" have been removed;
- the indicator "Total active customers" is calculated MtoM SIM cards excluded.

Number of national SIM cards (MtoM cards excluded)



Mobile penetration rate in France (MtoM cards excluded)



II. METROPOLITAN REPORT

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	67,525	67,966	68,672	68,989	68,628
among which Internet SIM cards	3,633	3,675	3,684	3,690	3,529
- Quarterly Net Adds	0,343	0,441	0,706	0,317	-0,361
- Year on year net growth (in %)	2,8%	2,9%	3,5%	2,7%	1,6%

Penetration Rate	106,1%	106,8%	107,9%	108,4%	107,4%
<i>Population at January the 1st of previous year (source: INSEE)</i>	63,652				63,920

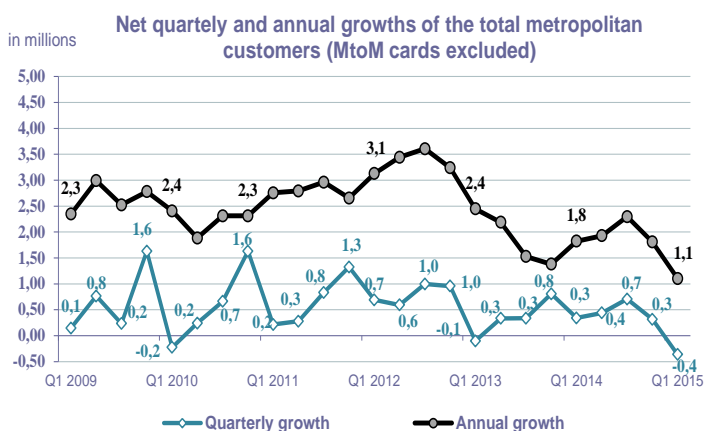
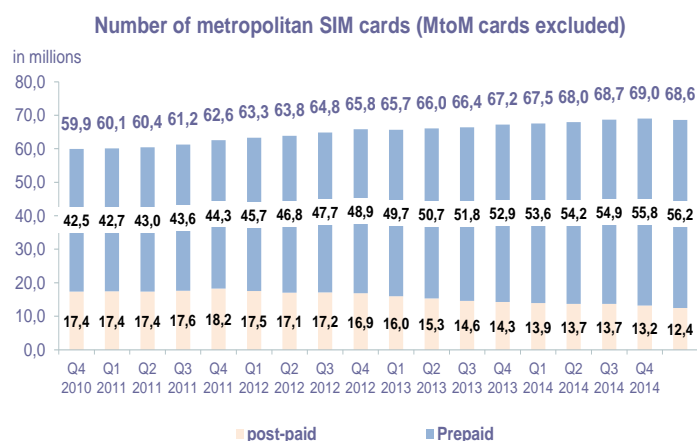
Postpaid customers	53,609	54,245	54,946	55,772	56,184
among which Internet SIM cards	2,935	2,928	2,919	2,884	2,755
- Quarterly gross sales	3,125	2,752	3,022	3,541	2,829
- Quarterly Net Adds	0,700	0,636	0,701	0,826	0,411
- Year on year net growth (in %)	7,8%	6,9%	6,1%	5,4%	4,8%

Prepaid customers	13,916	13,721	13,726	13,216	12,444
among which Internet SIM cards	0,698	0,747	0,765	0,806	0,773
- Quarterly gross sales	2,059	2,386	2,552	2,263	2,114
- Quarterly Net Adds	-0,356	-0,195	0,005	-0,510	-0,772
- Year on year net growth (in %)	-12,8%	-10,3%	-5,8%	-7,4%	-10,6%

Total active customers	64,649	65,225	65,894	66,255	66,189
- as a % of total customers	95,7%	96,0%	96,0%	96,0%	96,4%
- Quarterly Net Adds	-0,039	0,577	0,668	0,361	-0,065
- Year on year net growth (in %)	2,2%	2,6%	3,1%	2,4%	2,4%

Adjusted figures

All the indicators are now excluding MtoM SIM cards (see Appendix 1): "total customers", "penetration rate" and "total active customers" indicators are modified.



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

	March-14	June-14	Sept-14	Dec-14	March-15
Mobile networks operators (MNOs) customers	59,175	59,368	59,791	61,694	61,441
- Among which postpaid customers	49,480	50,017	50,664	52,886	53,204
- Quarterly Net Adds	0,036	0,193	0,423	1,903	-0,253
- Year on year net growth (in %)	2,0%	2,0%	2,2%	4,3%	3,8%
MVNOs customers	8,350	8,599	8,881	7,294	7,186
- Quarterly Net Adds	0,307	0,248	0,282	-1,587	-0,108
- Year on year net growth (in %)	8,5%	9,7%	12,9%	-9,3%	-10,7%
MVNO Market share	12,4%	12,7%	12,9%	10,6%	10,5%
MVNO Market share of gross postpaid sales	12,8%	14,3%	12,0%	8,0%	9,1%
MVNO Market share of gross prepaid sales	46,5%	53,3%	47,8%	48,1%	52,7%

Not relevant growths (integration of a part of the MNOs customers in the MVNOs market)

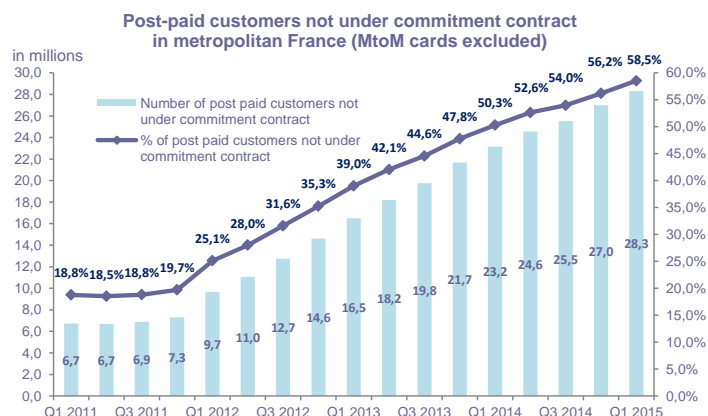
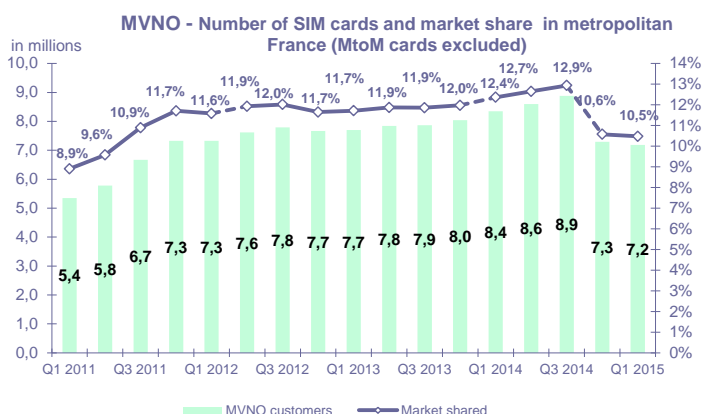
Note relevant growth (intégration of Numericable et Omea Telecom in the MNOs market)

All the indicators are now excluding MtoM SIM cards (see Appendix 1): "MNOs customers", "Among which postpaid customers", "MVNOs customers" and "MVNO market share of gross postpaid sales" indicators are modified.

II.3 Market fluidity

	March-14	June-14	Sept-14	Dec-14	March-15
Quarterly postpaid cancellation rate	4,6%	3,9%	4,3%	5,0%	4,4%
Quarterly prepaid cancellation rate	16,8%	18,5%	18,6%	20,5%	22,2%
Numbers ported during the quarter	1,363	1,191	1,317	1,672	1,373
- Year on year net growth (in %)	-27,2%	-15,2%	-0,3%	8,1%	0,7%
Post-paid residential customers not under commitment contract	23,157	24,557	25,528	27,004	28,320
- % of post-paid customers not under commitment contract	50,3%	52,6%	54,0%	56,2%	58,5%
Total residential customers not under commitment contract	37,074	38,278	39,254	40,220	40,764
- % of customers not under commitment contract	61,8%	63,4%	64,3%	65,6%	67,0%

All the indicators are now excluding MtoM SIM cards (see Appendix 1): "quarterly postpaid cancellation rate" indicator is modified.



III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET

III.1 Residential market - Total customers segmentation

	March-14	June-14	Sept-14	Dec-14	March-15
Total residential customers	59,958	60,367	61,019	61,271	60,826
- Quarterly Net Adds	2,488	2,527	2,533	2,546	2,386
- Quarterly Net Adds	0,326	0,409	0,652	0,252	-0,445
- Year on year net growth (in %)	2,9%	3,1%	3,6%	2,7%	1,4%
Postpaid residential customers	46,042	46,646	47,293	48,054	48,382
- Quarterly gross sales	2,784	2,429	2,719	3,126	2,285
- Quarterly Net Adds	0,682	0,604	0,647	0,761	0,328
- Year on year net growth (in %)	8,9%	7,8%	6,7%	5,9%	5,1%
Prepaid residential customers	13,916	13,721	13,726	13,216	12,444
- Quarterly gross sales	2,059	2,386	2,552	2,263	2,114
- Quarterly Net Adds	-0,356	-0,195	0,005	-0,510	-0,772
- Year on year net growth (in %)	-12,8%	-10,3%	-5,8%	-7,4%	-10,6%

Adjusted figures

III.3 Residential market - Mobile Virtual Network Operators Market share

	March-14	June-14	Sept-14	Dec-14	March-15
MNOs	51,852	52,020	52,396	54,225	53,909
- Quarterly Net Adds	0,093	0,168	0,377	1,828	-0,316
- Year on year net growth (in %)	2,3%	2,2%	2,4%	4,8%	4,0%
MVNOs	8,106	8,347	8,623	7,046	6,917
- Quarterly Net Adds	0,233	0,241	0,275	-1,577	-0,129
- Year on year net growth (in %)	7,4%	8,7%	11,9%	-10,5%	-14,7%
MVNO Market share	13,5%	13,8%	14,1%	11,5%	11,4%
MVNO Market share of gross postpaid sales	13,8%	15,5%	12,9%	8,4%	10,0%

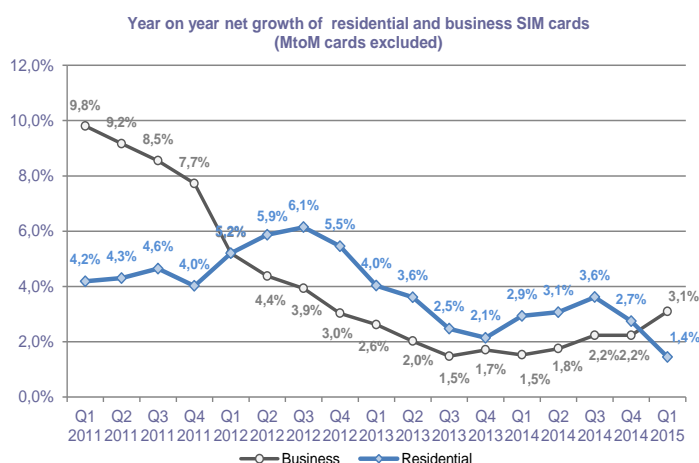
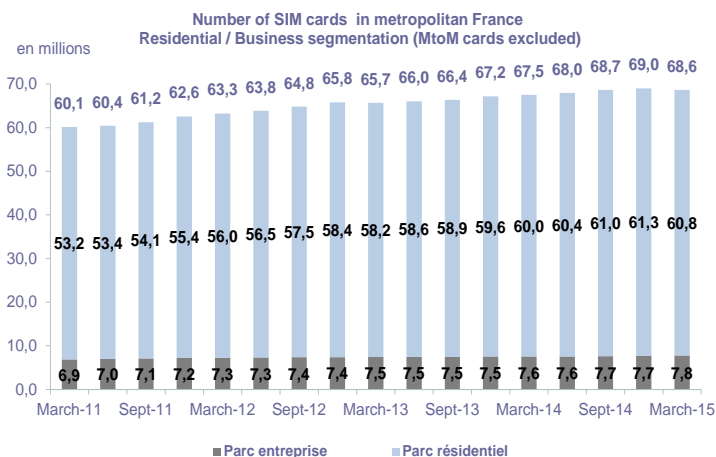
Not relevant growths (integration of a part of the MNOs customers in the MVNOs market)

Note relevant growth (intégration of Numericable et Omea Telecom in the MNOs market)

Adjusted figures

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

	March-14	June-14	Sept-14	Dec-14	March-15
Postpaid residential customers	7,567	7,599	7,653	7,718	7,802
among which Internet SIM cards	1,145	1,148	1,151	1,144	1,143
- Quarterly Net Adds	0,018	0,032	0,054	0,065	0,084
- Year on year net growth (in %)	1,5%	1,8%	2,2%	2,2%	3,1%

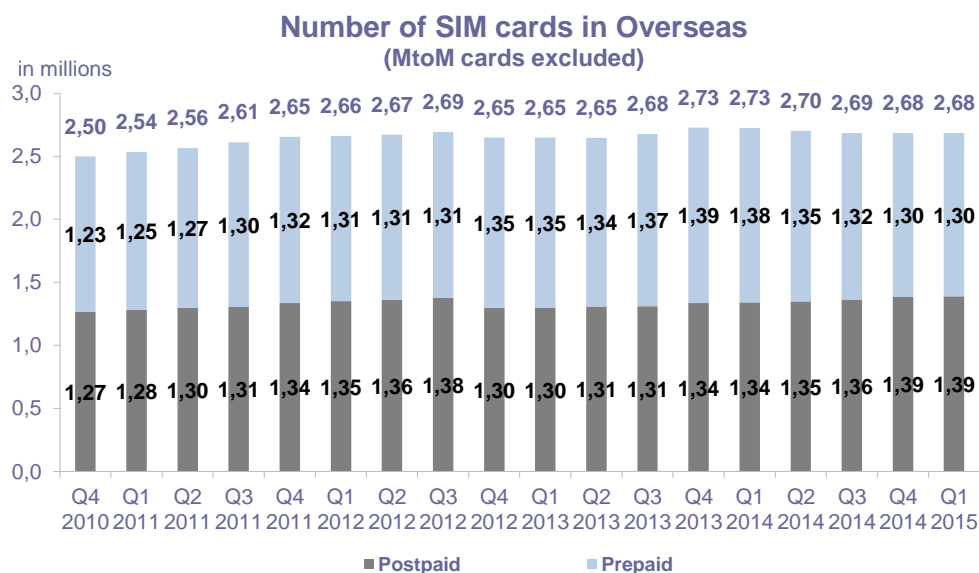


IV. OVERSEAS REPORT : DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	2,725	2,703	2,685	2,684	2,683
- Quarterly Net Adds	-0,002	-0,023	-0,018	-0,001	0,000
- Year on year net growth (in %)	2,9%	2,1%	0,3%	-1,6%	-1,5%
Penetration Rate	127,2%	126,1%	125,3%	125,2%	124,8%
Population at January the 1st of previous year (source: INSEE)	2,143				2,150
Postpaid customers	1,342	1,349	1,364	1,385	1,388
- Quarterly Net Adds	0,007	0,007	0,015	0,021	0,003
- Year on year net growth (in %)	3,3%	3,0%	4,1%	3,8%	3,4%
Prepaid customers	1,383	1,353	1,321	1,298	1,295
- Quarterly Net Adds	-0,009	-0,030	-0,033	-0,022	-0,003
- Year on year net growth (in %)	2,5%	1,2%	-3,3%	-6,7%	-6,4%
Total active customers	2,334	2,319	2,334	2,331	2,312
- as a % of total customers	85,6%	85,8%	86,9%	86,8%	86,1%
- Quarterly Net Adds	0,005	-0,015	0,016	-0,004	-0,019
- Year on year net growth (in %)	1,9%	2,1%	2,2%	0,1%	-1,0%

All the indicators are now excluding MtoM SIM cards (see Appendix 1): "total customers ", "penetration rate ", "postpaid customers" and "total active customers " indicators are modified.



IV.2 Guadeloupe, Saint-Martin, St-Baryhélemy: total customers and total active customers segmentation

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	0,719	0,701	0,687	0,679	0,682
- Quarterly Net Adds	0,002	-0,018	-0,014	-0,008	0,003
- Year on year net growth (in %)	4,3%	1,0%	-2,8%	-5,3%	-5,1%
Penetration Rate	159,7%	155,7%	152,6%	150,8%	151,7%
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,450				0,450
Postpaid customers	0,314	0,315	0,318	0,322	0,322
- Quarterly Net Adds	0,000	0,001	0,003	0,004	0,000
- Year on year net growth (in %)	2,4%	1,6%	2,7%	2,5%	2,7%
Prepaid customers	0,405	0,385	0,369	0,357	0,360
- Quarterly Net Adds	0,002	-0,020	-0,017	-0,012	0,003
- Year on year net growth (in %)	5,9%	0,6%	-7,1%	-11,5%	-11,2%
Total active customers	0,575	0,573	0,569	0,574	0,574
- as a % of total customers	80,0%	81,7%	82,8%	84,6%	84,2%
- Quarterly Net Adds	0,001	-0,003	-0,004	0,006	0,000
- Year on year net growth (in %)	0,0%	0,5%	0,2%	-0,1%	-0,2%

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	0,316	0,320	0,316	0,321	0,320
- Quarterly Net Adds	0,000	0,005	-0,005	0,005	-0,001
- Year on year net growth (in %)	6,3%	6,5%	1,8%	1,5%	1,4%
Penetration Rate	128,9%	130,8%	128,8%	131,0%	127,9%
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,245				0,250
Postpaid customers	0,110	0,111	0,112	0,114	0,114
- Quarterly Net Adds	0,000	0,001	0,001	0,002	0,000
- Year on year net growth (in %)	6,4%	4,2%	6,7%	4,6%	3,9%
Prepaid customers	0,206	0,210	0,204	0,207	0,206
- Quarterly Net Adds	-0,001	0,004	-0,006	0,003	-0,001
- Year on year net growth (in %)	6,2%	7,7%	-0,7%	-0,1%	0,1%
Total active customers	0,253	0,252	0,254	0,257	0,256
- as a % of total customers	80,1%	78,5%	80,6%	79,9%	80,0%
- Quarterly Net Adds	0,000	-0,001	0,003	0,002	0,000
- Year on year net growth (in %)	3,9%	2,6%	3,3%	1,6%	1,4%

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	0,591	0,592	0,589	0,587	0,586
- Quarterly Net Adds	-0,005	0,000	-0,003	-0,002	-0,001
- Year on year net growth (in %)	3,6%	3,6%	0,9%	-1,6%	-0,8%
Penetration Rate	153,6%	153,7%	153,0%	152,5%	153,8%
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,385				0,381
Postpaid customers	0,299	0,300	0,303	0,305	0,305
- Quarterly Net Adds	0,000	0,001	0,002	0,003	0,000
- Year on year net growth (in %)	1,4%	1,3%	2,4%	2,0%	1,8%
Prepaid customers	0,292	0,291	0,286	0,282	0,282
- Quarterly Net Adds	-0,005	-0,001	-0,005	-0,004	0,000
- Year on year net growth (in %)	5,9%	6,1%	-0,6%	-5,2%	-3,5%
Total active customers	0,484	0,482	0,487	0,482	0,479
- as a % of total customers	81,9%	81,5%	82,7%	82,1%	81,7%
- Quarterly Net Adds	0,000	-0,002	0,005	-0,005	-0,003
- Year on year net growth (in %)	0,8%	0,6%	1,3%	-0,4%	-1,1%

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	0,207	0,205	0,206	0,217	0,220
- Quarterly Net Adds	0,004	-0,002	0,001	0,011	0,003
- Year on year net growth (in %)	6,2%	5,6%	5,3%	7,2%	6,6%
Penetration Rate	95,1%	94,3%	94,9%	100,0%	101,4%
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,217				0,217
Postpaid customers	0,045	0,046	0,048	0,050	0,052
- Quarterly Net Adds	0,002	0,001	0,002	0,002	0,002
- Year on year net growth (in %)	4,4%	8,3%	14,7%	18,2%	15,8%
Prepaid customers	0,162	0,159	0,158	0,167	0,168
- Quarterly Net Adds	0,002	-0,003	-0,001	0,009	0,001
- Year on year net growth (in %)	6,7%	4,8%	2,7%	4,3%	4,0%
Total active customers	0,176	0,177	0,179	0,193	0,193
- as a % of total customers	85,3%	86,5%	86,9%	89,1%	87,6%
- Quarterly Net Adds	0,007	0,001	0,002	0,014	-0,001
- Year on year net growth (in %)	6,3%	7,0%	5,4%	14,2%	9,5%

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

	March-14	June-14	Sept-14	Dec-14	March-15
Total customers	0,889	0,881	0,884	0,876	0,871
- Quarterly Net Adds	-0,002	-0,008	0,003	-0,008	-0,005
- Year on year net growth (in %)	-0,5%	-0,2%	0,7%	-1,7%	-2,0%
Penetration Rate	105,9%	105,0%	105,3%	104,3%	103,0%
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,840				0,845
Postpaid customers	0,572	0,574	0,581	0,591	0,593
- Quarterly Net Adds	0,004	0,002	0,007	0,010	0,002
- Year on year net growth (in %)	4,2%	4,2%	4,4%	4,2%	3,6%
Prepaid customers	0,317	0,307	0,303	0,285	0,278
- Quarterly Net Adds	-0,007	-0,010	-0,004	-0,018	-0,007
- Year on year net growth (in %)	-7,9%	-7,5%	-5,6%	-12,0%	-12,3%
Total active customers	0,841	0,832	0,841	0,820	0,805
- as a % of total customers	94,6%	94,4%	95,2%	93,6%	92,5%
- Quarterly Net Adds	-0,002	-0,010	0,010	-0,021	-0,015
- Year on year net growth (in %)	2,5%	2,9%	2,9%	-2,8%	-4,3%

B - Internet of things : MtoM SIM cards

I. MtoM CARDS OF FRENCH OPERATORS

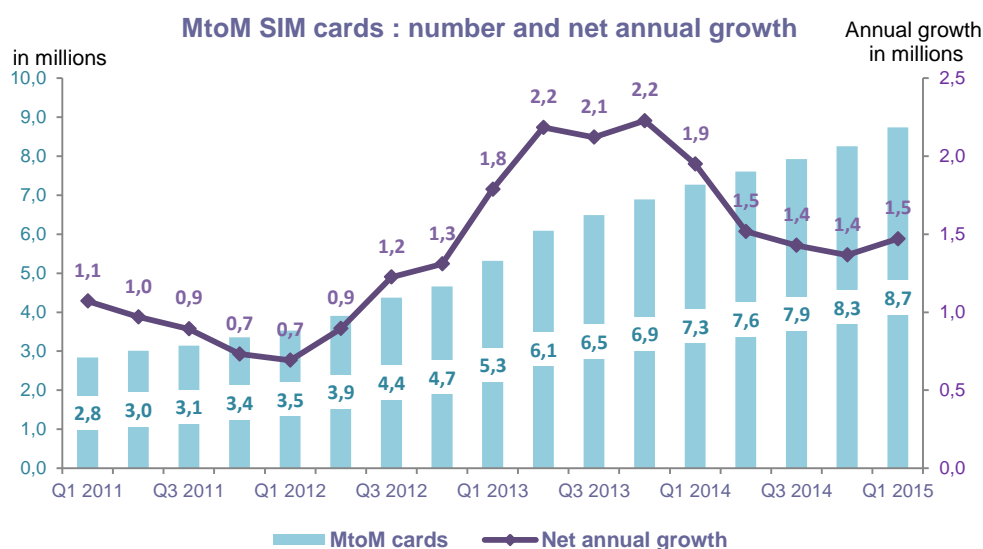
	March-14	June-14	Sept-14	Dec-14	March-15
MtoM SIM cards	7,265	7,609	7,922	8,257	8,736
-Gross sales for the quarter	0,410	0,404	0,375	0,397	0,559
- Quarterly Net Adds	0,375	0,344	0,313	0,335	0,479
- Year on year net growth (in %)	36,7%	24,9%	22,0%	19,8%	20,2%

I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	March-14	June-14	Sept-14	Dec-14	March-15
MtoM SIM cards	7,245	7,589	7,901	8,235	8,715
- Quarterly Net Adds	0,375	0,343	0,312	0,334	0,479
- Year on year net growth	36,7%	25,0%	22,0%	19,9%	20,3%
- Year on year net growth (in %)					

I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	March-14	June-14	Sept-14	Dec-14	March-15
MtoM SIM cards	0,020	0,021	0,021	0,022	0,021
- Quarterly Net Adds	0,000	0,000	0,000	0,001	-0,001
- Year on year net growth (in %)	23,3%	7,9%	7,2%	9,6%	5,0%



Appendix 1: Historical data (MtoM cards excluded and included)

National report

	March-12	June-12	Sept-12	Dec-12	March-13	June-13	Sept-13	Dec-13	March-14	June-14	Sept-14	Dec-14	March-15
<i>in millions</i>													
Total customers MtoM cards excluded	65,916	66,520	67,537	68,451	68,350	68,683	69,052	69,909	70,251	70,669	71,357	71,672	71,311
Total customers MtoM cards included	69,444	70,427	71,909	73,115	73,666	74,774	75,546	76,800	77,516	78,278	79,279	79,929	80,047
<i>in %</i>													
Penetration rate MtoM cards excluded	101,1%	102,0%	103,6%	105,0%	104,3%	104,8%	105,4%	106,7%	106,8%	107,4%	108,5%	108,9%	107,9%
Penetration rate MtoM cards included	106,5%	108,0%	110,3%	112,2%	112,4%	114,1%	115,3%	117,2%	117,8%	119,0%	120,5%	121,5%	121,2%
<i>in millions</i>													
Total active customers MtoM cards excluded	63,419	63,781	64,596	65,683	65,559	65,847	66,213	67,016	66,982	67,544	68,228	68,585	68,501
Total active customers MtoM cards included	66,947	67,688	68,968	70,346	70,875	71,939	72,706	73,907	74,248	75,153	76,150	76,842	77,236

Metropolitan report

	March-12	June-12	Sept-12	Dec-12	March-13	June-13	Sept-13	Dec-13	March-14	June-14	Sept-14	Dec-14	March-15
<i>in millions</i>													
Total customers MtoM cards excluded	63,255	63,848	64,846	65,803	65,702	66,036	66,375	67,182	67,525	67,966	68,672	68,989	68,628
Total customers MtoM cards included	66,783	67,755	69,218	70,466	71,001	72,109	72,849	74,052	74,771	75,555	76,573	77,224	77,342
<i>in %</i>													
Penetration rate MtoM cards excluded	100,3%	101,2%	102,8%	104,3%	103,7%	104,2%	104,7%	106,0%	106,1%	106,8%	107,9%	108,4%	107,4%
Penetration rate MtoM cards included	105,9%	107,4%	109,7%	111,7%	112,0%	113,8%	114,9%	116,8%	117,5%	118,7%	120,3%	121,3%	121,0%
<i>in millions</i>													
Total active customers MtoM cards excluded	61,067	61,430	62,223	63,383	63,270	63,576	63,928	64,688	64,649	65,225	65,894	66,255	66,189
Total active customers MtoM cards included	64,595	65,337	66,594	68,046	68,586	69,667	70,421	71,578	71,914	72,835	73,815	74,511	74,925
<i>in millions</i>													
Mobiles netw orks operators total customers MtoM cards excluded	55,929	56,230	57,056	58,136	58,005	58,200	58,506	59,139	59,175	59,368	59,791	61,694	61,441
Mobiles netw orks operators total customers MtoM cards included	59,452	60,131	61,420	62,793	63,289	64,244	64,933	65,934	66,320	66,851	67,579	69,801	70,025
<i>in millions</i>													
MVNO total customers MtoM cards excluded	7,325	7,618	7,791	7,667	7,697	7,837	7,869	8,043	8,350	8,599	8,881	7,294	7,186
MVNO total customers MtoM cards included	7,331	7,624	7,798	7,674	7,713	7,865	7,915	8,118	8,450	8,704	8,993	7,423	7,317
<i>in %</i>													
MVNO market share MtoM cards excluded	11,6%	11,9%	12,0%	11,7%	11,7%	11,9%	11,9%	12,0%	12,4%	12,7%	12,9%	10,6%	10,5%
MVNO market share MtoM cards included	11,0%	11,3%	11,3%	10,9%	10,9%	10,9%	10,9%	11,0%	11,3%	11,5%	11,7%	9,6%	9,5%
<i>in %</i>													
MVNO post-paid gross adds market share (MtoM excluded)	7,5%	11,7%	10,5%	10,1%	11,1%	12,6%	12,2%	12,1%	12,8%	14,3%	12,0%	8,0%	9,1%
MVNO post-paid gross adds market share (MtoM included)	7,2%	10,5%	9,1%	9,2%	9,6%	10,4%	11,2%	11,3%	11,7%	12,8%	10,9%	7,5%	7,8%

Overseas report

	March-12	June-12	Sept-12	Dec-12	March-13	June-13	Sept-13	Dec-13	March-14	June-14	Sept-14	Dec-14	March-15
<i>in millions</i>													
Total customers MtoM cards excluded					2,649	2,647	2,677	2,727	2,725	2,703	2,685	2,684	2,683
Total customers MtoM cards included					2,665	2,666	2,697	2,747	2,745	2,723	2,706	2,705	2,705

Appendix 2: Definitions

Total SIM cards: Total SIM cards registered with an operator's Home Location Register (HLR) 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/3G+ 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 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 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.

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 2015, from estimates published in January 2015 (and therefore of the population for January 1st, 2014), includes a metropolitan population 63 920 000 people, to which is added, for the DOM and the COM, a population of 2 150 000 people (450 000 people for Guadeloupe, St-Martin and St-Barthelemy, 250 000 people for Guyana, 381 000 people for Martinique, 217 000 people for Mayotte, 845 000 people for La Réunion and 6 000 for Saint Pierre and Miquelon).

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 or used a multimedia (e-mail, etc.) service during the past three months (not including incoming SMS).

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.

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:** Orange SA, Société Française du Radiotéléphone (SFR), Bouygues Telecom, Free mobile.
- **Overseas mobile network operators:** Orange Caraïbe, Orange Réunion, Société Réunionnaise du Radiotéléphone (SRR), Digicel AFG, SAS SPM, Dauphin Telecom, Outremer Telecom.
- **Mobile Virtual Network Operators independent of mobile network operators active on the quarter.**