



# Telecommunications observatory (mobiles market)

3<sup>d</sup> 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.



## A - Mobiles services market - MtoM SIM cards excluded

### I. NATIONAL REPORT - total customers and active customers

All the indicators are now excluding MtoM SIM cards

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>71,357</b>	<b>71,672</b>	<b>71,318</b>	<b>71,127</b>	<b>71,759</b>
- Quarterly Net Adds	0,688	0,315	-0,355	-0,190	0,632
- Year on year net growth (in %)	3,3%	2,5%	1,5%	0,6%	0,6%

<b>Penetration Rate</b>	<b>108,5%</b>	<b>108,9%</b>	<b>107,9%</b>	<b>107,7%</b>	<b>108,6%</b>
Population at January the 1 <sup>st</sup> of previous year (source: INSEE)	65,795		66,070		

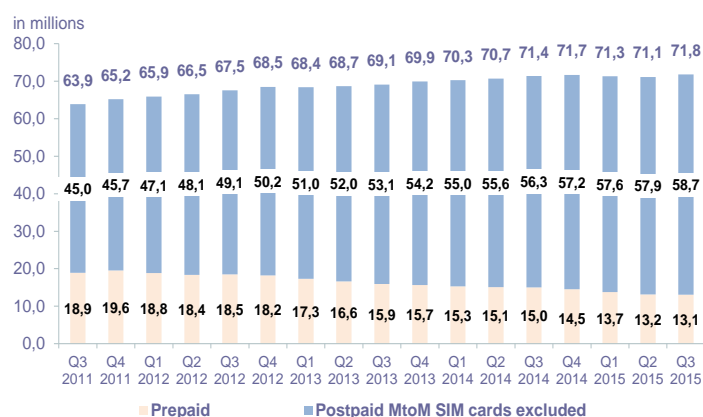
<b>Postpaid customers</b>	<b>56,310</b>	<b>57,158</b>	<b>57,570</b>	<b>57,947</b>	<b>58,653</b>
- Quarterly Net Adds	0,716	0,847	0,412	0,377	0,707
- Year on year net growth (in %)	6,0%	5,4%	4,8%	4,2%	4,2%

<b>Prepaid customers</b>	<b>15,047</b>	<b>14,515</b>	<b>13,748</b>	<b>13,181</b>	<b>13,106</b>
- Quarterly Net Adds	-0,028	-0,532	-0,767	-0,567	-0,074
- Year on year net growth (in %)	-5,6%	-7,3%	-10,1%	-12,6%	-12,9%

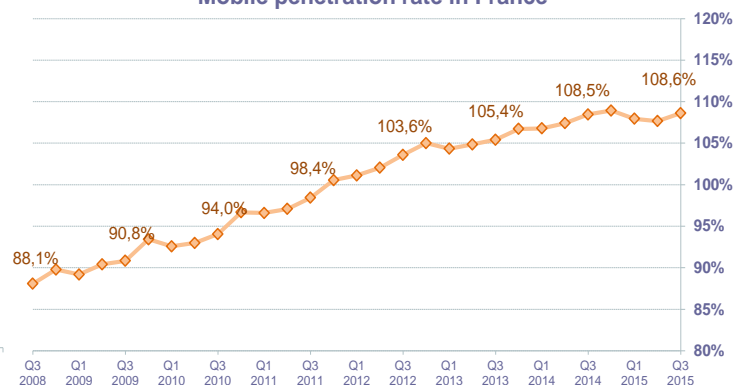
	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total active customers</b>	<b>68,228</b>	<b>68,585</b>	<b>68,495</b>	<b>68,780</b>	<b>69,632</b>
- as a % of total customers	95,6%	95,7%	96,0%	96,7%	97,0%
- Quarterly Net Adds	0,684	0,357	-0,090	0,285	0,852
- Year on year net growth (in %)	3,0%	2,3%	2,3%	1,8%	2,1%

Adjusted figures

Number of national SIM cards (MtoM cards excluded)



Mobile penetration rate in France



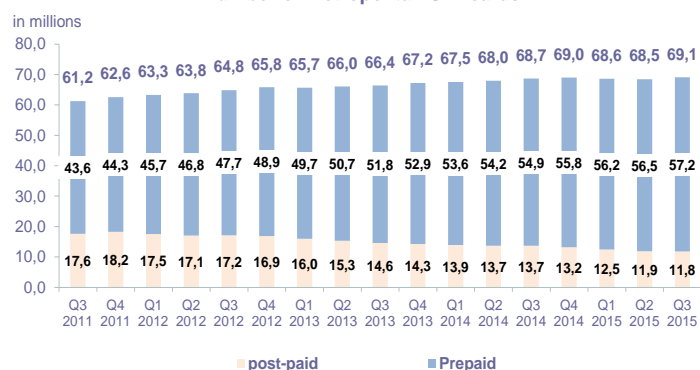
## II. METROPOLITAN REPORT



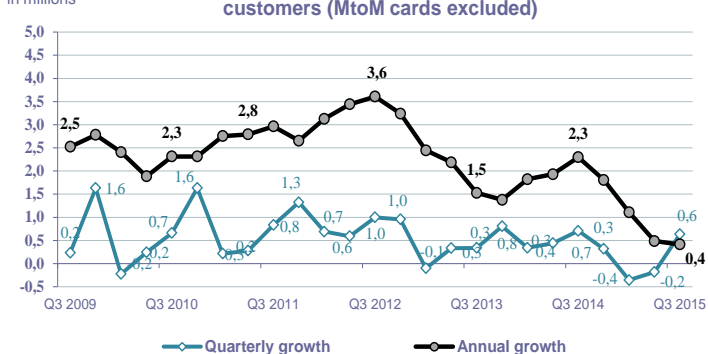
### II.1 Total customers segmentation and total active customers (excluding MtoM SIM cards)

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>68,672</b>	<b>68,989</b>	<b>68,634</b>	<b>68,452</b>	<b>69,087</b>
<b>among which Internet SIM cards</b>	<b>3,684</b>	<b>3,690</b>	<b>3,536</b>	<b>3,485</b>	<b>3,545</b>
- Quarterly Net Adds	0,706	0,317	-0,355	-0,182	0,634
- Year on year net growth (in %)	3,5%	2,7%	1,6%	0,7%	0,6%
<b>Penetration Rate</b>	<b>107,9%</b>	<b>108,4%</b>	<b>107,4%</b>	<b>107,1%</b>	<b>108,1%</b>
<i>Population at January the 1st of previous year (source: INSEE)</i>	63,652		63,920		
<b>Postpaid customers</b>	<b>54,946</b>	<b>55,772</b>	<b>56,182</b>	<b>56,540</b>	<b>57,242</b>
<b>among which Internet SIM cards</b>	<b>2,919</b>	<b>2,884</b>	<b>2,761</b>	<b>2,734</b>	<b>2,764</b>
- Quarterly gross sales	3,022	3,541	2,839	2,740	2,898
- Quarterly Net Adds	0,701	0,826	0,409	0,359	0,702
- Year on year net growth (in %)	6,1%	5,4%	4,8%	4,2%	4,2%
<b>Prepaid customers</b>	<b>13,726</b>	<b>13,216</b>	<b>12,453</b>	<b>11,912</b>	<b>11,844</b>
<b>among which Internet SIM cards</b>	<b>0,765</b>	<b>0,806</b>	<b>0,775</b>	<b>0,751</b>	<b>0,781</b>
- Quarterly gross sales	2,552	2,263	2,114	2,406	2,300
- Quarterly Net Adds	0,005	-0,510	-0,764	-0,540	-0,068
- Year on year net growth (in %)	-5,8%	-7,4%	-10,5%	-13,2%	-13,7%
<b>Total active customers</b>	<b>65,894</b>	<b>66,255</b>	<b>66,185</b>	<b>66,472</b>	<b>67,303</b>
- as a % of total customers	96,0%	96,0%	96,4%	97,1%	97,4%
- Quarterly Net Adds	0,668	0,361	-0,070	0,287	0,832
- Year on year net growth (in %)	3,1%	2,4%	2,4%	1,9%	2,1%

Number of metropolitan SIM cards



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



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

All the indicators are now excluding MtoM SIM cards



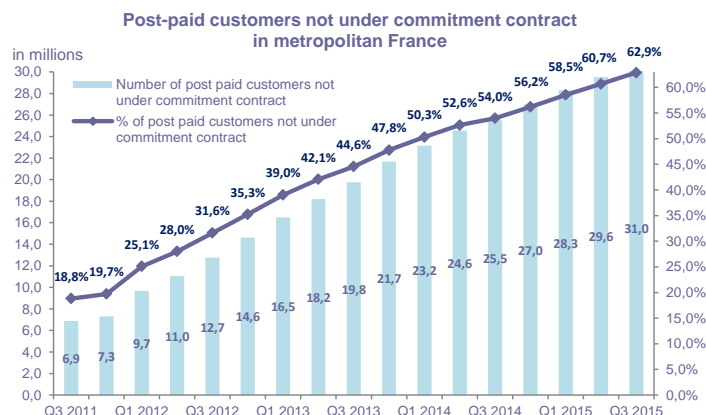
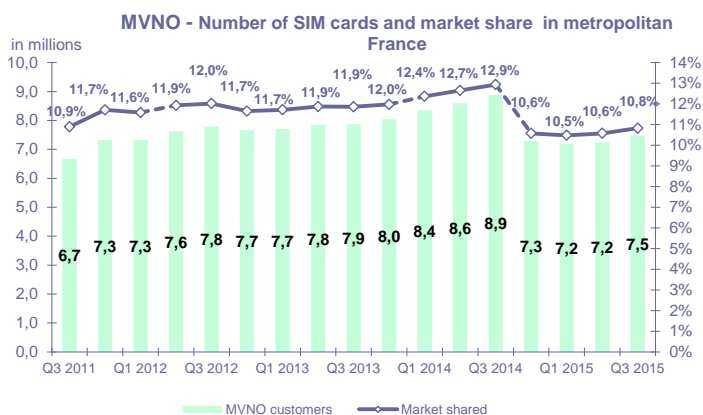
	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Mobile networks operators (MNOs) customers</b>	<b>59,791</b>	<b>61,694</b>	<b>61,441</b>	<b>61,216</b>	<b>61,610</b>
- Among which postpaid customers	<b>50,664</b>	<b>52,886</b>	<b>53,204</b>	<b>53,456</b>	<b>54,097</b>
- Quarterly Net Adds	0,423	1,903	-0,253	-0,226	0,395
- Year on year net growth (in %)	2,2%	4,3%	3,8%	3,1%	3,0%
<b>MVNOs customers</b>	<b>8,881</b>	<b>7,294</b>	<b>7,193</b>	<b>7,237</b>	<b>7,476</b>
- Quarterly Net Adds	0,282	-1,587	-0,102	0,044	0,239
- Year on year net growth (in %)	12,9%	-9,3%	-13,9%	-15,8%	-15,8%
<b>MVNO Market share</b>	<b>12,9%</b>	<b>10,6%</b>	<b>10,5%</b>	<b>10,6%</b>	<b>10,8%</b>
<b>MVNO Market share of gross postpaid sales</b>	<b>12,0%</b>	<b>8,0%</b>	<b>9,4%</b>	<b>9,7%</b>	<b>7,8%</b>
<b>MVNO Market share of gross prepaid sales</b>	<b>47,8%</b>	<b>48,1%</b>	<b>52,7%</b>	<b>52,9%</b>	<b>57,2%</b>

## II.3 Market fluidity

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Quarterly postpaid cancellation rate</b>	4,3%	5,0%	4,4%	4,3%	3,9%
<b>Quarterly prepaid cancellation rate</b>	18,6%	20,5%	22,2%	24,0%	19,7%
<b>Numbers ported during the quarter</b>	<b>1,317</b>	<b>1,672</b>	<b>1,373</b>	<b>1,270</b>	<b>1,265</b>
- Year on year net growth (in %)	-0,3%	8,1%	0,7%	6,6%	-3,9%
<b>Post-paid residential customers not under commitment contract</b>	<b>25,528</b>	<b>27,004</b>	<b>28,320</b>	<b>29,551</b>	<b>31,027</b>
- % of post-paid customers not under commitment contract	54,0%	56,2%	58,5%	60,7%	62,9%
<b>Total residential customers not under commitment contract</b>	<b>27,463</b>	<b>29,135</b>	<b>30,382</b>	<b>31,663</b>	<b>33,179</b>
- % of customers not under commitment contract	50,0%	52,2%	54,1%	56,0%	58,0%

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)



### III. METROPOLITAN RESIDENTIAL AND BUSINESS MARKET

All the indicators are now excluding MtoM SIM cards



#### III.1 Residential market - Total customers segmentation

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total residential customers</b>	<b>61,019</b>	<b>61,271</b>	<b>60,835</b>	<b>60,620</b>	<b>61,205</b>
- Quarterly Net Adds	2,533	2,546	2,387	2,330	2,394
- Quarterly Net Adds	0,652	0,252	-0,436	-0,214	0,584
- Year on year net growth (in %)	3,6%	2,7%	1,5%	0,4%	0,3%
<b>Postpaid residential customers</b>	<b>47,293</b>	<b>48,054</b>	<b>48,382</b>	<b>48,708</b>	<b>49,360</b>
- Quarterly gross sales	2,719	3,126	2,285	2,349	2,579
- Quarterly Net Adds	0,647	0,761	0,328	0,326	0,652
- Year on year net growth (in %)	6,7%	5,9%	5,1%	4,4%	4,4%
<b>Prepaid residential customers</b>	<b>13,726</b>	<b>13,216</b>	<b>12,453</b>	<b>11,912</b>	<b>11,844</b>
- Quarterly gross sales	2,552	2,263	2,114	2,406	2,300
- Quarterly Net Adds	0,005	-0,510	-0,764	-0,540	-0,068
- Year on year net growth (in %)	-5,8%	-7,4%	-10,5%	-13,2%	-13,7%

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

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>MNOs</b>	<b>52,396</b>	<b>54,225</b>	<b>53,909</b>	<b>53,656</b>	<b>54,007</b>
- Quarterly Net Adds	0,377	1,828	-0,316	-0,253	0,351
- Year on year net growth (in %)	2,4%	4,8%	4,0%	3,1%	3,1%
<b>MVNOs</b>	<b>8,623</b>	<b>7,046</b>	<b>6,926</b>	<b>6,965</b>	<b>7,198</b>
- Quarterly Net Adds	0,275	-1,577	-0,120	0,039	0,233
- Year on year net growth (in %)	11,9%	-10,5%	-14,6%	-16,6%	-16,5%
<b>MVNO Market share</b>	<b>14,1%</b>	<b>11,5%</b>	<b>11,4%</b>	<b>11,5%</b>	<b>11,8%</b>
<b>MVNO Market share of gross postpaid sales</b>	12,9%	8,4%	10,0%	10,5%	8,2%

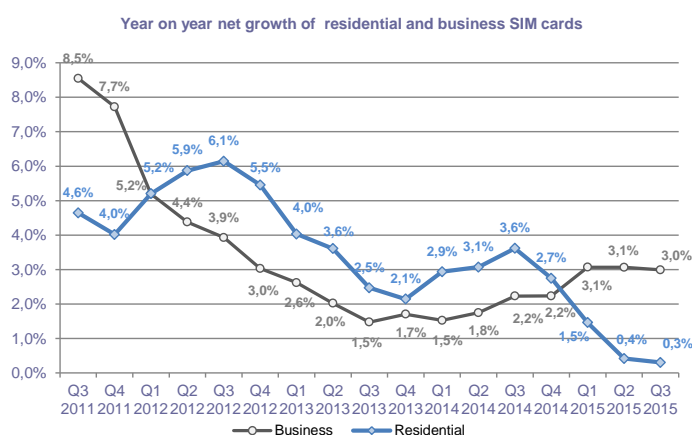
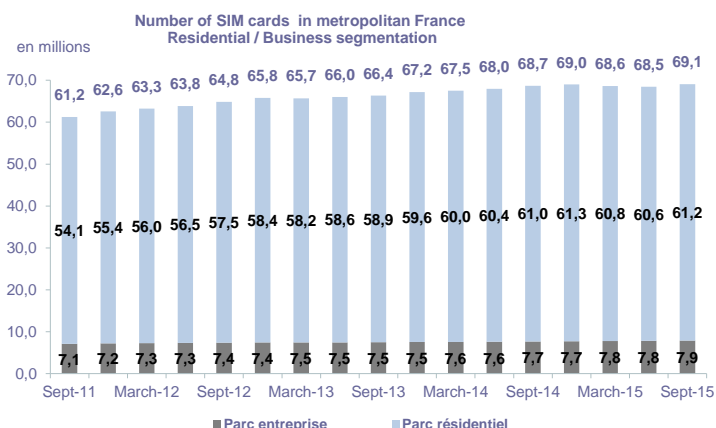
#### III.3 Business market - total customers MtoM SIM cards excluded

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Postpaid residential customers</b>	<b>7,653</b>	<b>7,718</b>	<b>7,799</b>	<b>7,832</b>	<b>7,882</b>
among which Internet SIM cards	1,151	1,144	1,149	1,155	1,152
- Quarterly Net Adds	0,054	0,065	0,081	0,033	0,050
- Year on year net growth (in %)	2,2%	2,2%	3,1%	3,1%	3,0%

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



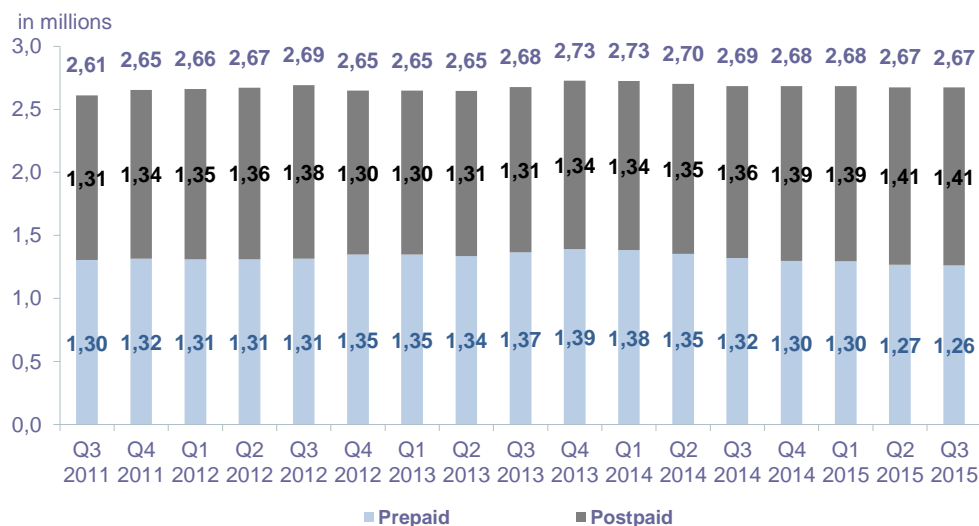
## IV. OVERSEAS REPORT : DOM, Saint-Martin, Saint-Barthélemy, Saint-Pierre-et-Miquelon

All the indicators are now excluding MtoM SIM cards

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

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>2,685</b>	<b>2,684</b>	<b>2,683</b>	<b>2,675</b>	<b>2,673</b>
- Quarterly Net Adds	-0,018	-0,001	0,000	-0,009	-0,002
- Year on year net growth (in %)	0,3%	-1,6%	-1,5%	-1,0%	-0,5%
<b>Penetration Rate</b>	<b>125,3%</b>	<b>125,2%</b>	<b>124,8%</b>	<b>124,4%</b>	<b>124,3%</b>
Population at January the 1st of previous year (source: INSEE)	2,143		2,150		
<b>Postpaid customers</b>	<b>1,364</b>	<b>1,385</b>	<b>1,388</b>	<b>1,406</b>	<b>1,411</b>
- Quarterly Net Adds	0,015	0,021	0,003	0,018	0,005
- Year on year net growth (in %)	4,1%	3,8%	3,4%	4,2%	3,4%
<b>Prepaid customers</b>	<b>1,321</b>	<b>1,298</b>	<b>1,295</b>	<b>1,268</b>	<b>1,262</b>
- Quarterly Net Adds	-0,033	-0,022	-0,003	-0,027	-0,007
- Year on year net growth (in %)	-3,3%	-6,7%	-6,4%	-6,3%	-4,5%
<b>Total active customers</b>	<b>2,334</b>	<b>2,331</b>	<b>2,310</b>	<b>2,309</b>	<b>2,329</b>
- as a % of total customers	86,9%	86,8%	86,1%	86,3%	87,1%
- Quarterly Net Adds	0,016	-0,004	-0,020	-0,002	0,020
- Year on year net growth (in %)	2,2%	0,1%	-1,0%	-0,4%	-0,2%

### Number of SIM cards in Overseas





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



	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>0,687</b>	<b>0,679</b>	<b>0,682</b>	<b>0,683</b>	<b>0,668</b>
- Quarterly Net Adds	-0,014	-0,008	0,003	0,001	-0,015
- Year on year net growth (in %)	-2,8%	-5,3%	-5,1%	-2,5%	-4,7%
<b>Penetration Rate</b>	<b>152,6%</b>	<b>150,8%</b>	<b>151,7%</b>	<b>151,9%</b>	<b>148,5%</b>
Population at January the 1st of previous year (source: INSEE)	0,450		0,450		
<b>Postpaid customers</b>	<b>0,318</b>	<b>0,322</b>	<b>0,322</b>	<b>0,327</b>	<b>0,325</b>
- Quarterly Net Adds	0,003	0,004	0,000	0,004	-0,002
- Year on year net growth (in %)	2,7%	2,5%	2,7%	3,6%	2,2%
<b>Prepaid customers</b>	<b>0,369</b>	<b>0,357</b>	<b>0,360</b>	<b>0,356</b>	<b>0,343</b>
- Quarterly Net Adds	-0,017	-0,012	0,003	-0,003	-0,014
- Year on year net growth (in %)	-7,1%	-11,5%	-11,2%	-7,5%	-7,1%
<b>Total active customers</b>	<b>0,569</b>	<b>0,574</b>	<b>0,573</b>	<b>0,575</b>	<b>0,591</b>
- as a % of total customers	82,8%	84,6%	84,0%	84,2%	88,4%
- Quarterly Net Adds	-0,004	0,006	-0,001	0,002	0,015
- Year on year net growth (in %)	0,2%	-0,1%	-0,4%	0,5%	3,8%

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



	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>0,316</b>	<b>0,321</b>	<b>0,320</b>	<b>0,325</b>	<b>0,336</b>
- Quarterly Net Adds	-0,005	0,005	-0,001	0,005	0,011
- Year on year net growth (in %)	1,8%	1,5%	1,4%	1,6%	6,4%
<b>Penetration Rate</b>	<b>128,8%</b>	<b>131,0%</b>	<b>127,9%</b>	<b>130,0%</b>	<b>134,2%</b>
Population at January the 1st of previous year (source: INSEE)	0,245		0,250		
<b>Postpaid customers</b>	<b>0,112</b>	<b>0,114</b>	<b>0,114</b>	<b>0,115</b>	<b>0,115</b>
- Quarterly Net Adds	0,001	0,002	0,000	0,001	0,000
- Year on year net growth (in %)	6,7%	4,6%	3,9%	3,7%	2,2%
<b>Prepaid customers</b>	<b>0,204</b>	<b>0,207</b>	<b>0,206</b>	<b>0,210</b>	<b>0,221</b>
- Quarterly Net Adds	-0,006	0,003	-0,001	0,004	0,011
- Year on year net growth (in %)	-0,7%	-0,1%	0,1%	0,4%	8,7%
<b>Total active customers</b>	<b>0,254</b>	<b>0,257</b>	<b>0,257</b>	<b>0,259</b>	<b>0,258</b>
- as a % of total customers	80,6%	79,9%	80,1%	79,6%	76,8%
- Quarterly Net Adds	0,003	0,002	0,000	0,002	-0,001
- Year on year net growth (in %)	3,3%	1,6%	1,5%	3,0%	1,4%

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



	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>0,589</b>	<b>0,587</b>	<b>0,586</b>	<b>0,580</b>	<b>0,584</b>
- Quarterly Net Adds	-0,003	-0,002	-0,001	-0,006	0,004
- Year on year net growth (in %)	0,9%	-1,6%	-0,8%	-2,0%	-0,8%
<b>Penetration Rate</b>	<b>153,0%</b>	<b>152,5%</b>	<b>153,8%</b>	<b>152,1%</b>	<b>153,2%</b>
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,385		0,381		
<b>Postpaid customers</b>	<b>0,303</b>	<b>0,305</b>	<b>0,305</b>	<b>0,307</b>	<b>0,306</b>
- Quarterly Net Adds	0,002	0,003	0,000	0,002	-0,001
- Year on year net growth (in %)	2,4%	2,0%	1,8%	2,3%	1,1%
<b>Prepaid customers</b>	<b>0,286</b>	<b>0,282</b>	<b>0,282</b>	<b>0,273</b>	<b>0,278</b>
- Quarterly Net Adds	-0,005	-0,004	0,000	-0,009	0,005
- Year on year net growth (in %)	-0,6%	-5,2%	-3,5%	-6,3%	-2,8%
<b>Total active customers</b>	<b>0,487</b>	<b>0,482</b>	<b>0,479</b>	<b>0,473</b>	<b>0,472</b>
- as a % of total customers	82,7%	82,1%	81,6%	81,6%	80,8%
- Quarterly Net Adds	0,005	-0,005	-0,004	-0,005	-0,002
- Year on year net growth (in %)	1,3%	-0,4%	-1,1%	-1,8%	-3,1%

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



	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>0,206</b>	<b>0,217</b>	<b>0,220</b>	<b>0,220</b>	<b>0,223</b>
- Quarterly Net Adds	0,001	0,011	0,003	0,000	0,003
- Year on year net growth (in %)	5,3%	7,2%	6,6%	7,5%	8,4%
<b>Penetration Rate</b>	<b>94,9%</b>	<b>100,0%</b>	<b>101,4%</b>	<b>101,4%</b>	<b>102,8%</b>
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,217		0,217		
<b>Postpaid customers</b>	<b>0,048</b>	<b>0,050</b>	<b>0,052</b>	<b>0,052</b>	<b>0,054</b>
- Quarterly Net Adds	0,002	0,002	0,002	0,000	0,002
- Year on year net growth (in %)	14,7%	18,2%	15,8%	13,1%	13,0%
<b>Prepaid customers</b>	<b>0,158</b>	<b>0,167</b>	<b>0,168</b>	<b>0,168</b>	<b>0,169</b>
- Quarterly Net Adds	-0,001	0,009	0,001	0,000	0,001
- Year on year net growth (in %)	2,7%	4,3%	4,0%	5,9%	6,9%
<b>Total active customers</b>	<b>0,179</b>	<b>0,193</b>	<b>0,193</b>	<b>0,193</b>	<b>0,197</b>
- as a % of total customers	86,9%	89,1%	87,6%	87,6%	88,1%
- Quarterly Net Adds	0,002	0,014	-0,001	0,000	0,004
- Year on year net growth (in %)	5,4%	14,2%	9,5%	8,8%	9,8%

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



	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>Total customers</b>	<b>0,884</b>	<b>0,876</b>	<b>0,871</b>	<b>0,862</b>	<b>0,858</b>
- Quarterly Net Adds	0,003	-0,008	-0,005	-0,009	-0,004
- Year on year net growth (in %)	0,7%	-1,7%	-2,0%	-2,2%	-2,7%
<b>Penetration Rate</b>	<b>105,3%</b>	<b>104,3%</b>	<b>103,0%</b>	<b>102,0%</b>	<b>101,5%</b>
<i>Population at January the 1st of previous year (source: INSEE)</i>	0,840		0,845		
<b>Postpaid customers</b>	<b>0,581</b>	<b>0,591</b>	<b>0,593</b>	<b>0,602</b>	<b>0,609</b>
- Quarterly Net Adds	0,007	0,010	0,002	0,010	0,006
- Year on year net growth (in %)	4,4%	4,2%	3,6%	4,9%	4,7%
<b>Prepaid customers</b>	<b>0,303</b>	<b>0,285</b>	<b>0,278</b>	<b>0,259</b>	<b>0,249</b>
- Quarterly Net Adds	-0,004	-0,018	-0,007	-0,019	-0,010
- Year on year net growth (in %)	-5,6%	-12,0%	-12,3%	-15,5%	-17,8%
<b>Total active customers</b>	<b>0,841</b>	<b>0,820</b>	<b>0,805</b>	<b>0,804</b>	<b>0,808</b>
- as a % of total customers	95,2%	93,6%	92,5%	93,3%	94,2%
- Quarterly Net Adds	0,010	-0,021	-0,015	-0,001	0,004
- Year on year net growth (in %)	2,9%	-2,8%	-4,3%	-3,3%	-4,0%

## B - Internet of things : MtoM SIM cards

### I. MtoM CARDS OF FRENCH OPERATORS

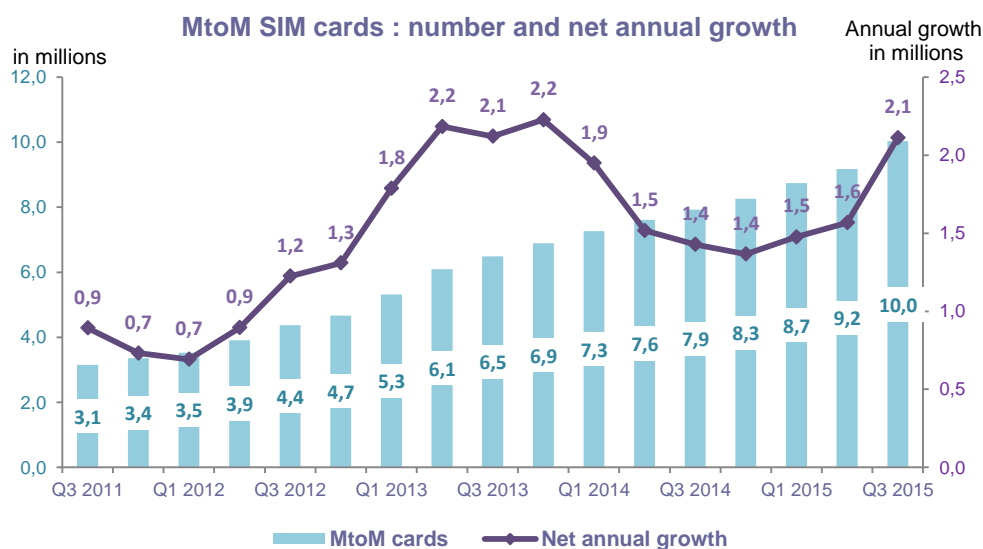
	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>MtoM SIM cards</b>	<b>7,922</b>	<b>8,257</b>	<b>8,742</b>	<b>9,177</b>	<b>10,033</b>
-Gross sales for the quarter	0,375	0,397	0,559	0,558	0,909
- Quarterly Net Adds	0,313	0,335	0,485	0,434	0,856
- Year on year net growth (in %)	22,0%	19,8%	20,3%	20,6%	26,6%

### I.1 MtoM CARDS OF FRENCH OPERATORS - METROPOLITAN

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>MtoM SIM cards</b>	<b>7,901</b>	<b>8,235</b>	<b>8,721</b>	<b>9,155</b>	<b>10,010</b>
- Quarterly Net Adds	0,312	0,334	0,486	0,434	0,856
- Year on year net growth	22,0%	19,9%	20,4%	20,6%	26,7%
- Year on year net growth (in %)					

### I.2 MtoM CARDS OF FRENCH OPERATORS - OVERSEAS DEPARTMENTS

	Sept-14	Dec-14	March-15	June-15	Sept-15
<b>MtoM SIM cards</b>	<b>0,021</b>	<b>0,022</b>	<b>0,021</b>	<b>0,022</b>	<b>0,023</b>
- Quarterly Net Adds	0,000	0,001	-0,001	0,001	0,001
- Year on year net growth (in %)	7,2%	9,6%	5,0%	6,8%	7,4%



## Annexe 1 : Modifications apportées à la publication

### I. Dissociation des indicateurs relatifs aux cartes SIM classiques et aux cartes MtoM

Les cartes SIM MtoM, utilisées généralement pour la communication entre équipements distants, constituent l'un des axes de l'internet des objets directement relié à l'activité mobile. Ces cartes sont par exemple utilisées pour le traçage des objets et outils de travail (flottes de véhicules, machines...), à des fins d'actualisation de données (relevés à distance de compteurs, de capteurs...), d'identification et de surveillance de tous ordres (alarmes, interventions à distance,...). Les usages et les revenus afférents à ces cartes sont en effet très différents de ceux des cartes classiques. En outre, il existe de fortes disparités quant aux aspects concurrentiels, notamment concernant les durées d'engagement, les acteurs présents sur ces marchés, etc.

Pour l'ensemble des indicateurs de la publication (voir liste complète ci-dessous), ces cartes n'étaient auparavant pas dissociées des cartes SIM équipant les téléphones mobiles, les tablettes ou les ordinateurs. Compte tenu de l'essor grandissant de l'activité MtoM et, en conséquence, des difficultés d'interprétation de certains indicateurs (taux de pénétration par exemple), l'ARCEP sépare désormais totalement ces deux types de cartes au sein de la publication.

Les indicateurs touchés par ce changement :

- S'agissant du tableau de bord marché national, le parc total et le taux de pénétration ne sont plus présentés que hors MtoM. Auparavant, ces indicateurs étaient présentés dans les deux versions (hors MtoM et y compris MtoM). En outre, le parc total actif est désormais calculé hors MtoM.
- S'agissant du tableau de bord métropole, le parc total, le taux de pénétration et le parc total actif, le parc total et le parc post-payé des opérateurs de réseaux, le parc total des MVNO, le taux de pénétration et ventes brutes post-payé des MVNO, le taux de résiliation post-payé, le nombre et la proportion du parc post-payé libre d'engagement sont désormais présentés hors MtoM.
- S'agissant du tableau de bord marché outremer, le parc total, le taux de pénétration et le parc total actif sont désormais présentés hors MtoM.

### II. Ajout d'indicateurs relatifs aux cartes internet exclusives et au marché entreprises

Deux types d'indicateurs ont été intégrés à la publication. Ces indicateurs sont publiés sur le marché métropole exclusivement :

- les cartes SIM internet sont désormais segmentées entre nombre de cartes post-payées et nombre de cartes prépayées. Ces cartes sont vendues sous forme de forfait ou en contrat prépayé par l'opérateur pour un usage d'échange de données exclusivement.
- Afin de restituer d'une manière exhaustive le marché mobile des services mobiles en métropole, l'ARCEP publie également le parc entreprise à un rythme trimestriel. Dans les publications précédentes, seul le parc résidentiel était publié.

### III. Segmentation du marché en outremer par département

Les indicateurs relatifs aux départements et collectivités d'outremer étaient, dans les publications précédentes, publiés par zone (Antilles-Guyane, Réunion / Mayotte), avec une segmentation du parc total par département. Désormais, l'ensemble des indicateurs (taux de pénétration, parcs post et prépayés, parc total actif), sont publiés par département.

## 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 1<sup>st</sup> January of the year N-1 published by INSEE on the 1<sup>st</sup> January of the year N. The reference population in 2015, from estimates published in January 2015 (and therefore of the population for January 1<sup>st</sup>, 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, Société Française du Radiotéléphone (SFR), Bouygues Telecom, Free mobile.
- **Overseas mobile network operators :** Orange Caraïbes, Orange Réunion, Société Réunionnaise du Radiotéléphone (SRR), Digicel AFG, SAS SPM, Globaltel, Dauphin Telecom, Outremer Telecom, Telco OI.
- **Mobile Virtual Network Operators independent of mobile network operators active on the quarter.**