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Abstracts

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BMI View: The widening stage brought forward by Free's entry into the mobile market in 2012 is drawing to a close, with operators looking at deepening and upselling new services. All four operators have the advantage of being fully convergent, giving them a head-start to offer multiple services to single accounts. But other drivers also include M2M and the IoT, with Orange taking a lead in the segment, and leveraging its success to gain more net additions than its rivals. SFR will compete on quad-play and content, Bouygues on providing cheaper fixed broadband and advanced LTE, while Free will continue to offer pricing pressure through the launch of innovative services.

France has four fully converged operators offering fixed and mobile services to customers in the market. As it becomes saturated, operators will look to expend their premium services offers, as a way to increase revenues by upselling them to their customer base. A short-term focus will be on lowering churn, which is helped by the increased penetration of quad-play customers, with investments into new advanced technologies such as LTE and fibre also of importance. Moving ahead, operators will be looking to add a series of connected devices to their high-end customers, such as connected homes or connected cars, as a way to retain and improve profitability where customer growth declines. We also believe that consolidation will return to the agenda following the December 2015 auction for the 700MHz band, which will create clear winners and losers in the market.

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