

# France Telecommunications Report Q2 2016

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## Abstracts

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**BMI View:** In accordance to our expectations following the 700MHz spectrum auction in December 2015, there is a move towards consolidation in the French market, after discussions were reported between Orange and Bouygues. SFR and Free are also involved in the talks, as there will need to be concessions to these two players to gain regulatory approval. Many issues are yet to be resolved, including the stakes of the States and Bouygues in a merged entity, but this follows the new trend of deepening at play in the market, four years after Free's entry. All players are now converged, with strategies focusing on advanced networks, content, greater convergence and connected objects.

### Key Data

Convergence continues to be a driving trend in the market, with regulator ARCEP reporting that 24% of mobile plans were on quad-play, and 69% of TV subscribers also had broadband services as part of their plan.

The distinction between service and hardware continues to grow, with 65.5% of postpaid users being on SIM-only plans.

Latest data from the regulator, dating from Q315, reported there were 18.5mn LTE users in France, up from 7.8mn in Q314.

## Contents

BMI Industry View

SWOT

Telecoms

Industry Forecast

Latest Updates

Structural Trends

Table: Telecoms Sector - Historical Data & Forecasts (France 2013-2020)

Industry Risk Reward Ratings

Industry Risk/Reward Index

Table: Western Europe Risk Reward Index

France

Market Overview

Market Drivers & Trends

Mobile

Wireline Voice & Broadband

Pay-TV/Convergence

Regulatory Development

Regulatory Overview

Table: Division Of Regulatory Responsibilities In France

Regulatory Developments

Competitive Landscape

Table: Key Players - France Telecoms Sector

Operators' Data

Table: Orange

Table: SFR

Table: Bouygues Telecom

Table: Free

Company Profile

Orange

SFR

Bouygues Telecom

Demographic Forecast

Table: Population Headline Indicators (France 1990-2025)

Table: Key Population Ratios (France 1990-2025)

Table: Urban/Rural Population & Life Expectancy (France 1990-2025)

Table: Population By Age Group (France 1990-2025)

Table: Population By Age Group % (France 1990-2025)

## Glossary

Table: Glossary Of Terms

## Methodology

Industry Forecast Methodology

## Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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