

# France Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** The collapse of the deal between Orange and Bouygues does not necessarily mean the end of consolidation, as the long-term trends favour it. However, it is unlikely that any deal will be agreed until the next presidential elections in May 2017. After the price war introduced by the arrival of Free in the mobile market in 2012, prices have declined but have stabilised, meaning that operators have opportunities to upsell. Convergence has always been a major trend, but the low penetration of LTE and very-high-speed broadband offers opportunities, as well as the move towards connected objects through Internet of Things (IoT) strategies.

### Key Data

There was a drop q-o-q in the mobile market, from 81.312mn to 80.215mn, due to SFR losing over 1.65mn subscriptions in the quarter (a combination of M2M and prepaid).

The fixed voice market ended 2015 with 38.9mn subscriptions, of which 26.1mn were based on IP services and the remainder on legacy PSTN networks

There were over 4.26mn Very-High-Speed Broadband subscriptions at the end of 2015, of which 1.4mn were on fibre networks

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