

# Tariff Trends SnapShot 26 - French Mobile Pricing Trends

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## Abstracts

Following on from the 2nd TCL SnapShot, which examined the initial impact of the entry of the new 4th French mobile operator in 2012, TCL examines the longer term impact of Free Mobile on the French market, and the impact on the established players and how pricing and service packages have changed. Finally it considers the lessons that may be learned by established operators when combatting a disruptive new entrant.

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## About

Traditionally the French MNO market has been dominated by Pay Monthly users which account for around 75% of the market with Pre Pay users being addressed by the MVNO segment.

With the launch of Free Mobile, the dominance of Pay Monthly users in the total market has continued, with a number of existing Pre Pay users migrating to the new 30 day (no commitment) contract.

SFR forecasts that 30% of the French market will be composed of users who do not use subsidised handsets.

French MNOs predict that in 2012 handset sales will fall from 24 million units (2011) to under 20 million (2012).

The introduction of Free Mobile has disrupted all of the existing French MNO & MVNO price bundles:

- Although all 3 MNOs sought to pre-empt the launch of Free in 2011 with the launch of “no-frills” sub-brands, all MNOs had to modify their tariffs in early 2012 with the introduction of Free.
- Users have benefitted from the introduction of no commitment contract terms which are now a common feature of the market.
- There has been an increase in “unlimited” calls & SMS packages – and also in the amount of Mobile Data packages – available.

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