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TITLE: Collection and publication of voice over IP indicators in France

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## *Collection and publication of voice over IP indicators in France*

ITU – 12 October 2005

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  - Definitions of number of subscriptions, volume of communications, revenue generated by end customer
- **(II) VoIP market in the first quarter of 2006**
  - Subscriptions
  - Traffic volumes

## I – Definitions of indicators - General definition -

- **Indicators collected quarterly to monitor the VoIP market**
  - Number of VoIP subscriptions
  - Volume of outgoing VoIP communications
  - Revenue from VoIP services
- **Number of operators responding in first quarter of 2006: 24**
- **IP telephony indicators cover:**
  - Voice over broadband, irrespective of the medium (mainly IP DSL, but also IP over cable): fixed-telephony services using VoIP technology **over an internet access network** at > 128 kbit/s and in which **quality is controlled by the operator** providing the services (23 operators)
  - Voice over internet **where the operators are declared** to the regulatory authority (ARCEP): voice communication services using the public internet network in which quality of service is not controlled by the operator providing them (1 operator). Very marginal amount of traffic.
- **The market research observatory does not poll undeclared operators offering voice services over internet from PC to PC (e.g. Skype), which remain outside the scope of the survey.**

## I – Definitions of indicators - Number of subscriptions, volume and revenue -

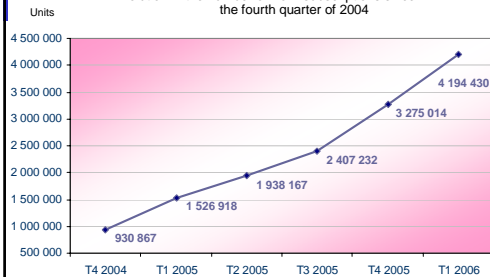
- **Number of subscriptions to a VoIP service:**

A subscription is considered as active if it corresponds to a connection actually activated by the customer for telephone service use. Subscriptions to a VoIP service within a multi-play package are counted.
- **Volume of outgoing VoIP communications (millions of minutes), broken down by call destination:**
  - National calls
  - International calls
  - Calls to mobiles

The outgoing VoIP communications counted are for services offered at the access level. The indicators do not count traffic using the IP protocol only in the backbone.
- **Revenues from VoIP services. The observatory distinguishes between:**
  - Revenue from **subscriptions** to the service, accounted for with the revenue from fixed telephone subscriptions (notably the STN)
  - **Call revenue: This only covers billed VoIP traffic** (e.g. over and above a multi-play package). In practice, it is mainly fixed calls to mobiles and international calls.

## II – VoIP market in France - Subscriptions -

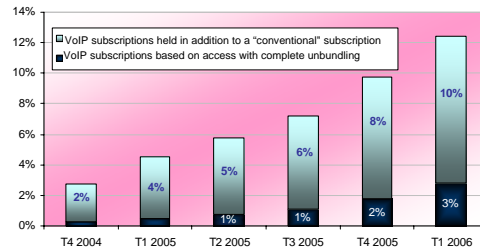
Evolution in the number of VoIP subscriptions since the fourth quarter of 2004



- **4.2 million VoIP subscriptions in France in the first quarter of 2006**, i.e. nearly three times more than the previous year
- **+900 000 subscriptions per quarter in T4 2005 and T1 2006**
- **compared with around +500 000 in previous quarters**

- **In T1 2006, IP subscriptions account for 13% of telephone subscriptions in France**, as against 5% one year earlier
- **Of the 4.2 million IP subscriptions, 25% are based on complete unbundling**, as against only 10% in T1 2005

VoIP subscriptions as a proportion of fixed access



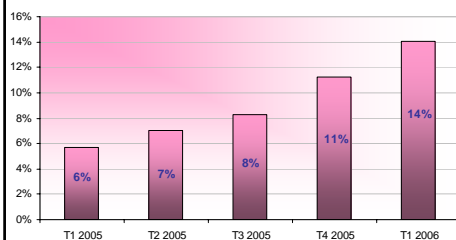
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et des Postes  
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## II – VoIP market in France - Communication volumes -

Volumes (millions of minutes)	T1 2005	T2 2005	T3 2005	T4 2005	T1 2006	Variation 1T2006/1T2005
<b>Total fixed-line communications</b>	<b>26 876</b>	<b>25 613</b>	<b>22 885</b>	<b>26 126</b>	<b>27 774</b>	<b>3,3%</b>
STN communications	25 349	23 812	20 984	23 263	23 869	-5,8%
VoIP communications	1 527	1 802	1 901	2 863	3 905	155,8%

- The volume of outgoing VoIP communications comes to around 4 billion minutes in the first quarter of 2006, accounting for 14% of communications from a fixed station, as against 6% one year earlier.
- As at T1 2006, the total volume of communications from a fixed station has increased by 3.3% in one year, rising to nearly 28 billion minutes, on account of the sharp rise in outgoing VoIP communications.
- The volume of "conventional" communications has fallen by 5.8%
- On average, customers subscribing to VoIP have telephoned 5H34 per month. In the first quarter of 2006, the average consumption by subscriber stands at 5H48

Share of outgoing IP traffic from fixed stations



IP traffic average consumption/subscriber/month

