

Affordably priced 100 or unlimited gigabyte 4G LTE smartphone plans with tethering – Trouble is brewing for cable & fixed-line operators

- 4G LTE smartphone plans with 100 or unlimited gigabyte volume are promoted by European mobile operators as the ultimate packages for connecting computers and tablets and streaming movies while at home
- Incremental (out-of-bundle) gigabytes in US fixed broadband internet (fibre) plans cost as much as incremental gigabytes in 4G LTE smartphone plans (\$0.2 vs. €0.2 per gigabyte) in Europe's competitive mobile markets
- A European incumbent fixed and mobile operator launched LTE-based IPTV set top boxes for televisions in the home
- Are cable and FTTH based broadband access monopolies/duopolies a thing of the past?

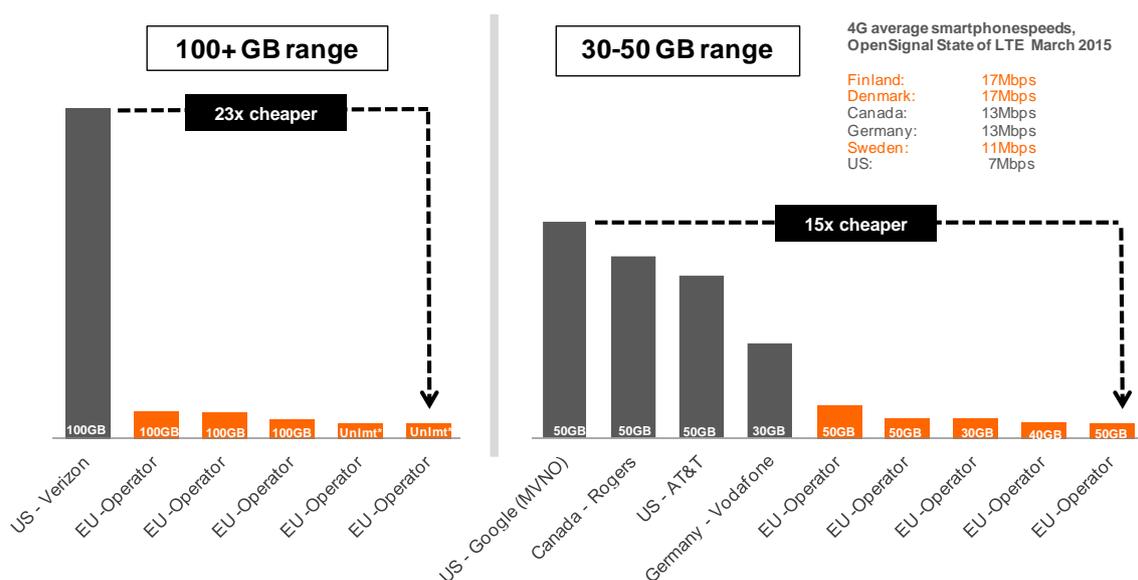
Rewheel / Digital Fuel Monitor premium research note, 1st June 2015

On the 21st of May 2015 the third (1H-2015) Digital Fuel Monitor update was released¹ by Rewheel. DFMonitor's 1H-2015 release includes 1,638 smartphone and data-only tariff plans offered in 41 countries from 137 operators, 40 operator discount brands and 71 independently owned Mobile Virtual Network Operators (MVNOs). The main finding of the third DFMonitor release was that Europe's mobile internet divide is widening "While the gigabytes that €35 can buy stayed flat at around 2 in the German, Italian, Spanish, Belgian, Austrian and Portuguese protected markets in the Nordics & Baltics they doubled every year and reached 19 gigabytes in 1H2015" Furthermore the latest data (tariffs April and May 2015) reconfirmed the 100 times difference in the gigabyte price or included gigabyte volume both in smartphone and data-only tariffs among EU28 and OECD countries.

In this flash research note we focus on affordably priced 100 or unlimited gigabyte 4G LTE & LTE-Advanced (300Mbps) smartphone plans that (important!) include tethering and on mobile broadband plans with 100, 200, 500 or unlimited volume allowance that are promoted by a number of European mobile operators as home broadband replacements. We examine the ramifications for cable and fixed-line broadband operator offerings and strategies.

Affordably priced 100 or unlimited gigabyte 4G LTE smartphone (incl. tethering) plans brew trouble for cable and fixed line operators

4G SIM-only smartphone tariffs with unlimited (>1,000) minutes & SMS (volume can be used for hotspot)

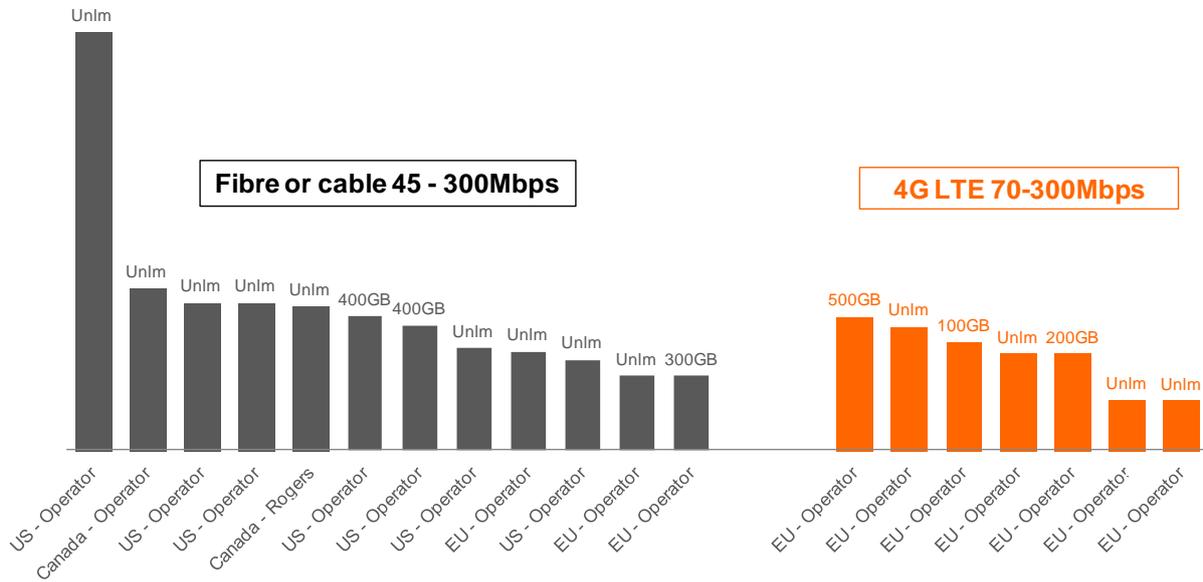


Prices April-May 2015 dfmonitor.eu Other currencies converted to EUR by using exchange rates

* Truly unlimited - No Fair Usage Police and unlimited hotspot/tethering

¹ www.dfmonitor.eu

Affordably priced 100, 200, 500 or unlimited gigabyte 4G LTE data only home broadband plans - Cheaper than cable!



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