

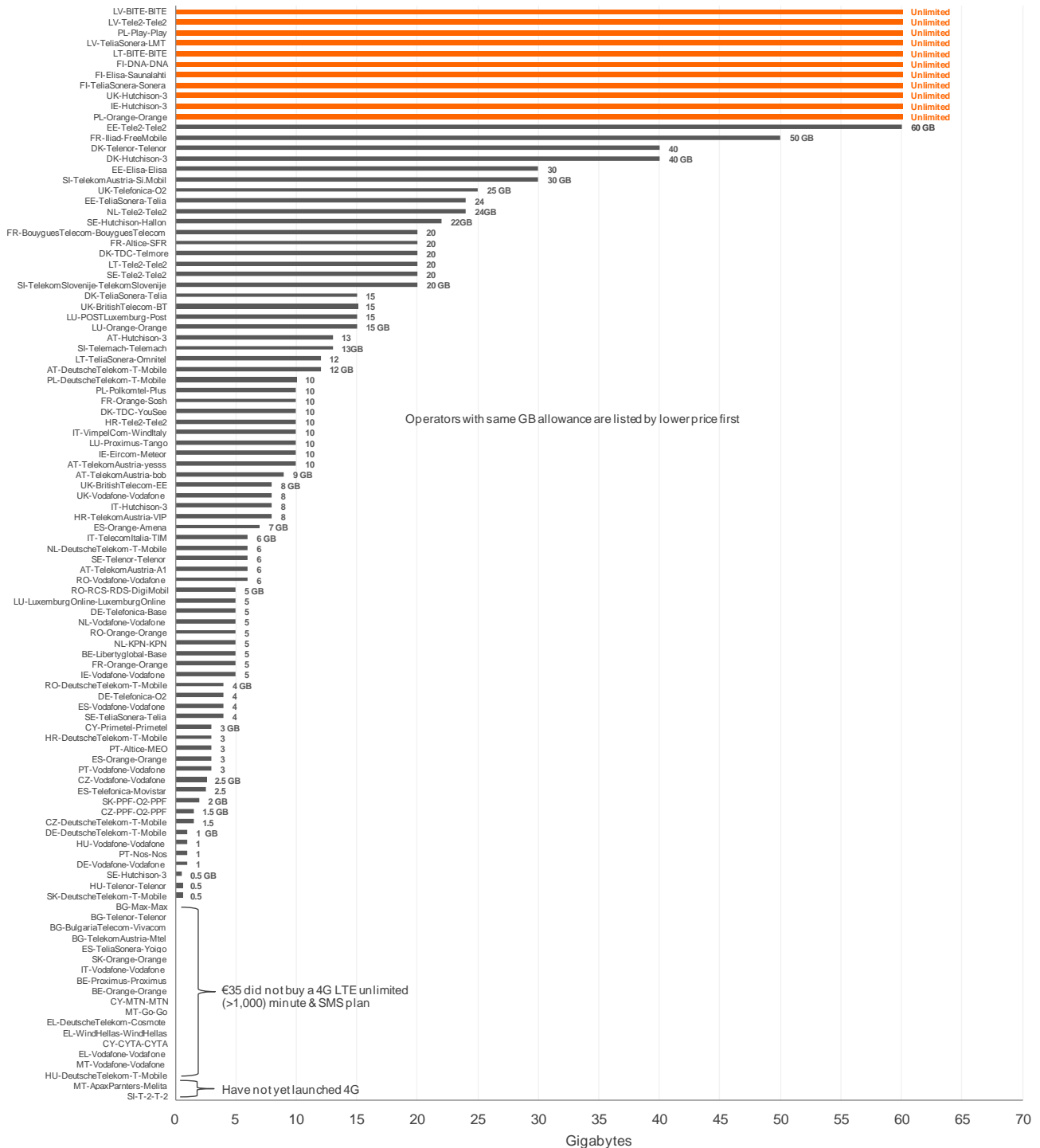
How many 4G LTE smartphone GBs EU28 operators sell for €35 - July 2016

- 26% (27 out of 102) of EU28 operators sold during July 2016, for €35 or less, 4G LTE smartphone plans that included at least 20 GB. 11% (11 out of 102) of operators sold for €35 plans with unlimited GB volume allowance.
- The European Commission proposed wholesale data roaming cap of €8.5/GB was higher than the domestic retail price/GB charged, during July 2016, by 75 out of 102 EU28 operators.
- In markets with less MNOs (3 vs. 4) and more so in markets where no disruptor operator is present EU's big telecom operator groups offer 8 to 20 times less GBs for €35.

Rewheel / Digital Fuel Monitor public research note, 13th July 2016

4G LTE smartphone GBs EU28 operators sell for €35 - July 2016

4G LTE SIM-only unlimited (>1,000) minute & SMS smartphone plan per operator¹ that for €35 or less includes the most GBs



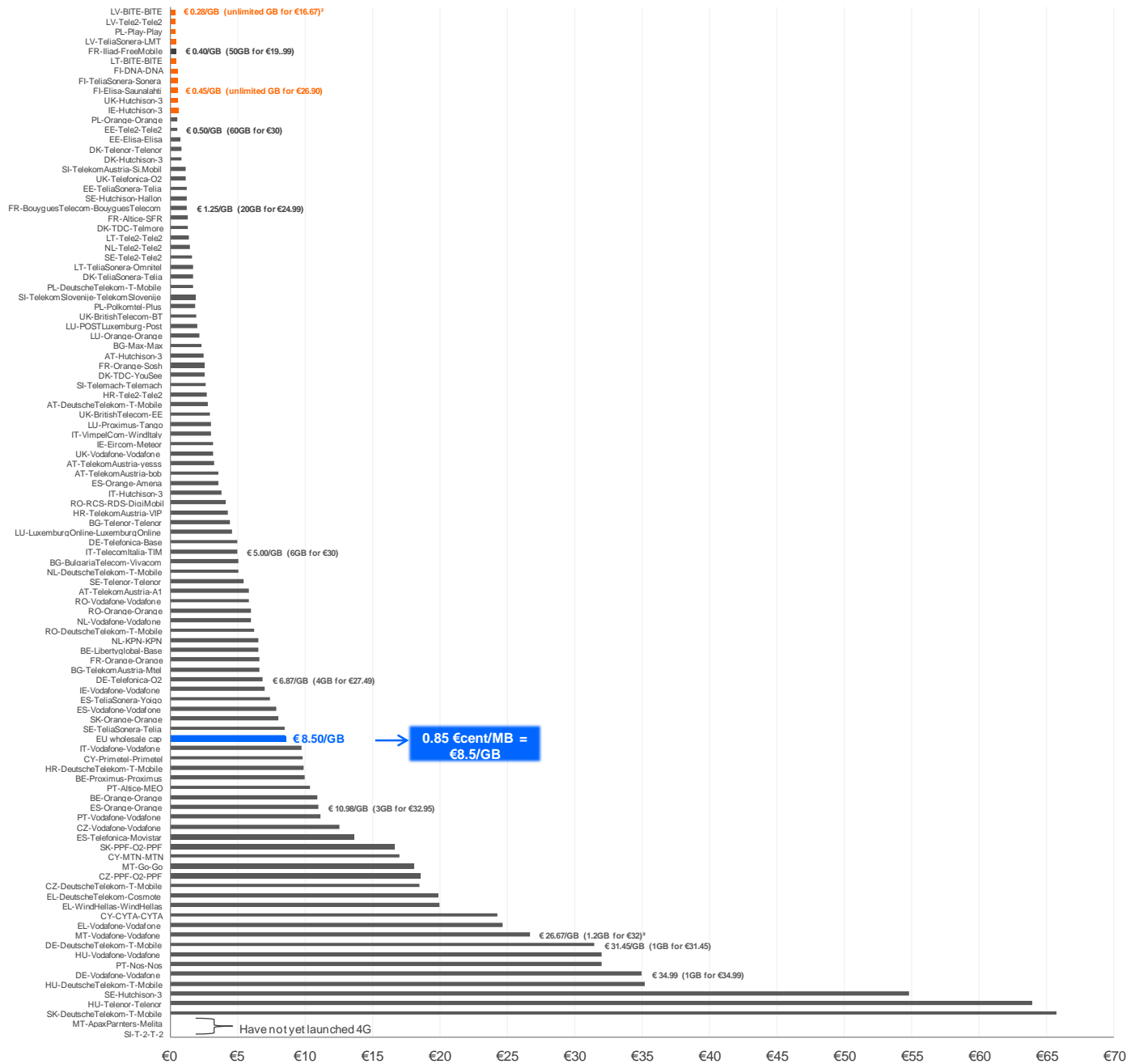
¹MNO main brands. For MNOs where a sub brand sold more gigabytes for €35 both the operator main brand and sub brand are included in the comparison

²Plans with unlimited data volume were assigned a finite volume of 60GB. 60GB was the highest finite volume sold for €35 in EU28

The Commission proposed wholesale data roaming cap of €8.5/GB is much higher than domestic retail GB prices

The EC wholesale data roaming cap of €8.5/GB is higher than the domestic retail price/GB charged by 75 out of 102 EU28 operators - July 2016

Operator fully allocated¹ retail price/GB of 4G LTE unlim (>1000) min & SMS plans that for €35 include the most GBs



¹Operator fully allocated retail price/GB = Tariff monthly retail price incl. VAT divided by GB volume allowance

²Plans with unlimited data volume were assigned a finite volume of 60GB. 60GB was the highest finite volume sold for €35 in EU28

³The fully allocated price/GB for operators where the lowest available plan was higher than €35 is the fully allocated price of the next highest (than €35) plan

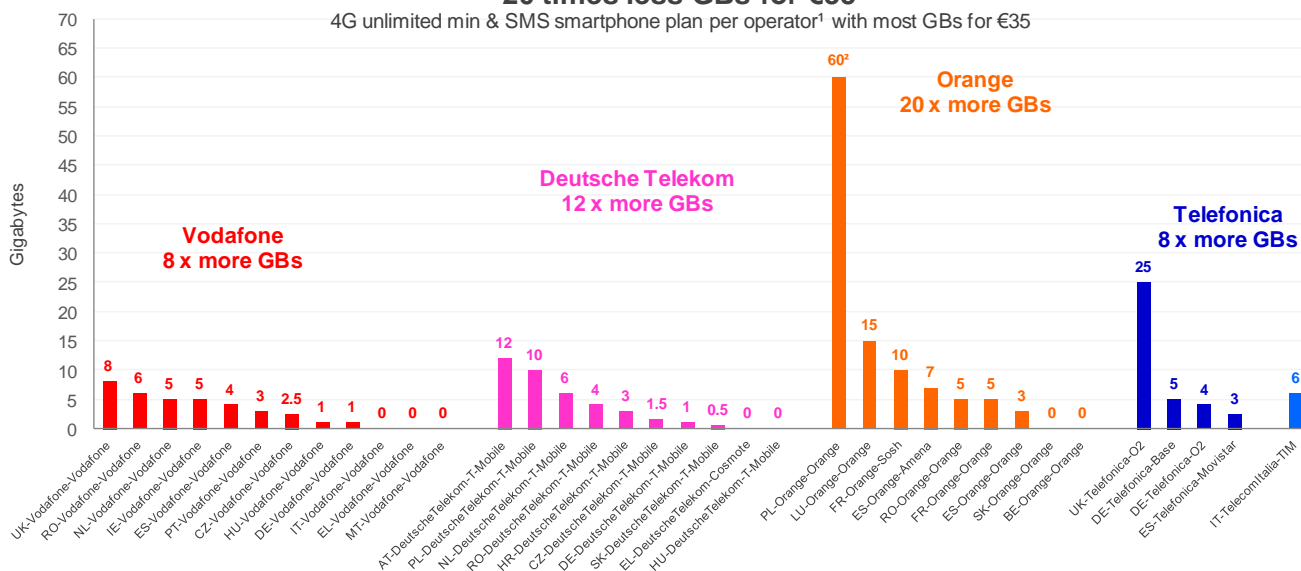
Prices 9 to 12 July 2016
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For detailed analysis of the considerable market distortion that the Commission’s proposed wholesale data roaming cap will create see our July 2016 premium research note¹, titled “The EC proposed wholesale data roaming cap of €8.5/GB is much higher than domestic retail prices across most EU states”.

¹ http://www.dfmonitor.eu/insights/2016_june_premium_eu_data_roaming_wholesale_cap/

In markets with less MNOs (3 vs. 4) and more so in markets where no disruptor² operator is present EU's big telecom operator groups offer 8 to 20 times less GBs for €35

In markets with less MNOs (3 vs. 4) and more so in markets where no disruptor¹ operator is present EU's big telecom operator groups offer 8 to 20 times less GBs for €35



¹Mobile-only (e.g. Hutchison) and mobile-centric (e.g. Tele2) operators that do not sell fixed BB in most of their ts markets.
²Plans with unlimited data volume were assigned a finite volume of 60GB. 60GB was the highest finite volume sold for €35 in EU28

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Please do let us know if you think that we missed a tariff with higher GB allowance that met the criteria³, at the time of data collection, by emailing us at contact@dfmonitor.eu

² http://www.dfmonitor.eu/insights/2016_jan_premium_tightoligopoly_eu28/

³ <http://www.dfmonitor.eu/about/>