

Annex I Country briefs: PT - Portugal

Mobile monthly prices for 100 gigabytes will plummet below €9.99 and Gigabit broadband below €19.99 soon after DIGI's much anticipated 4th MNO entry in Portugal

Portugal was historically one of EU's most lucrative 3-MNO oligopoly markets characterized by weak competition and high invariable prices. Portugal's 3-MNO oligopoly market is just about to get disrupted by DIGI, the maverick operator group that has already turn Romania as one of the most dynamic and competitive EU mobile and broadband markets. Now DIGI is on route to shake up the Spanish and Portuguese markets. Herein, we benchmark the Portuguese high mobile and broadband prices to the ultra-competitive Romanian prices with the objective of predicting how low will prices drop in Portugal soon after DIGI's 4th MNO entry.

Portugal population: 10,247,605

Mobile market: 3 MNOs, MEO-PT, Vodafone-PT, NOS-PT

Mobile and broadband service providers: MEO, Nowo, Vodafone, NOS

Minimum monthly price for a mobile voice-data plan with 100 gigabytes: €27.99 sold by MEO and NOS

Minimum monthly price for a broadband plan with Gigabit download speed: €28.75 sold by Nowo

Romania population: 19,892,812

Mobile market: 4 MNOs, Orange-RO, Vodafone-RO, Telekom-RO, DIGI-RO

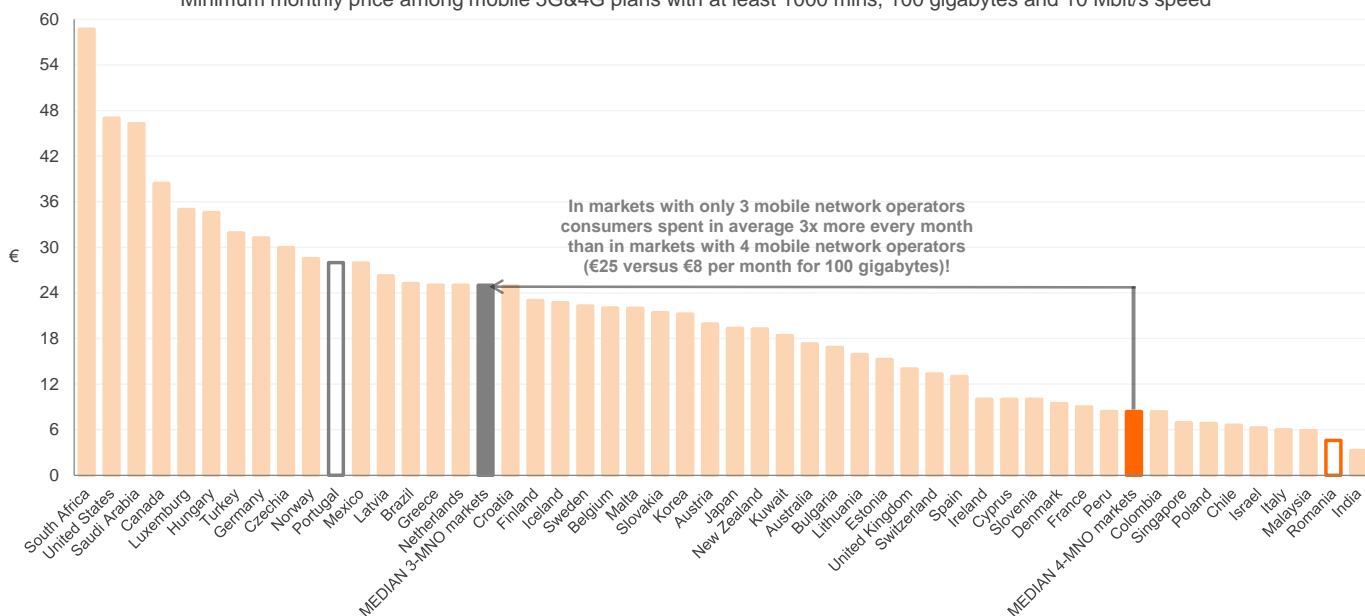
Mobile and broadband service providers: Orange, Yoxo, Vodafone, Telekom, DIGI, NextGen

Minimum monthly price for a mobile voice-data plan with 100 gigabytes: €4.58 sold by DIGI

Minimum monthly price for a broadband plan with Gigabit download speed: €7.33 sold by DIGI

Mobile market competitiveness - MIN monthly price for 100 gigabytes - 1H2024

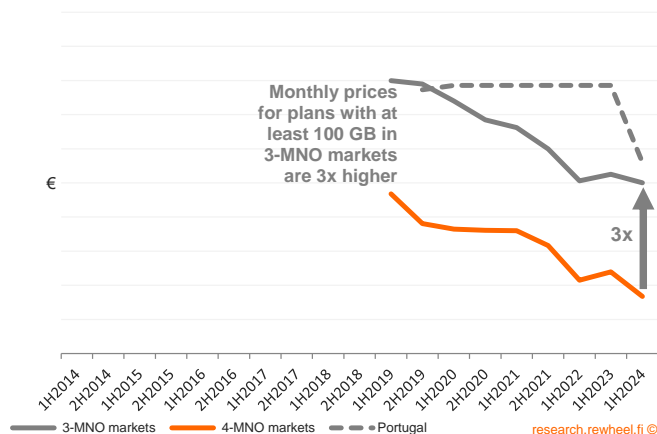
Minimum monthly price among mobile 5G&4G plans with at least 1000 mins, 100 gigabytes and 10 Mbit/s speed



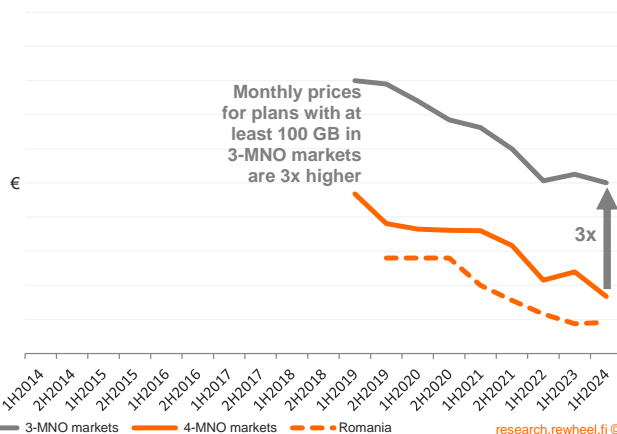
Minimum monthly retail price (incl. VAT & tax) for the given gigabyte volume and speed among all eligible tariffs logged in the database for country.

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MIN monthly price 100GB - 3 vs 4-MNO markets, 50 countries
5G&4G voice-data plans with at least 1000 mins and 10 Mbps speed



MIN monthly price 100GB - 3 vs 4-MNO markets, 50 countries
5G&4G voice-data plans with at least 1000 mins and 10 Mbps speed



This is a public redacted 1-page version of this Annex. The full 9-page Annex I Country briefs: PT – Portugal together with the full Annex I and the full 64-page main report is available to Rewheel research subscribers.