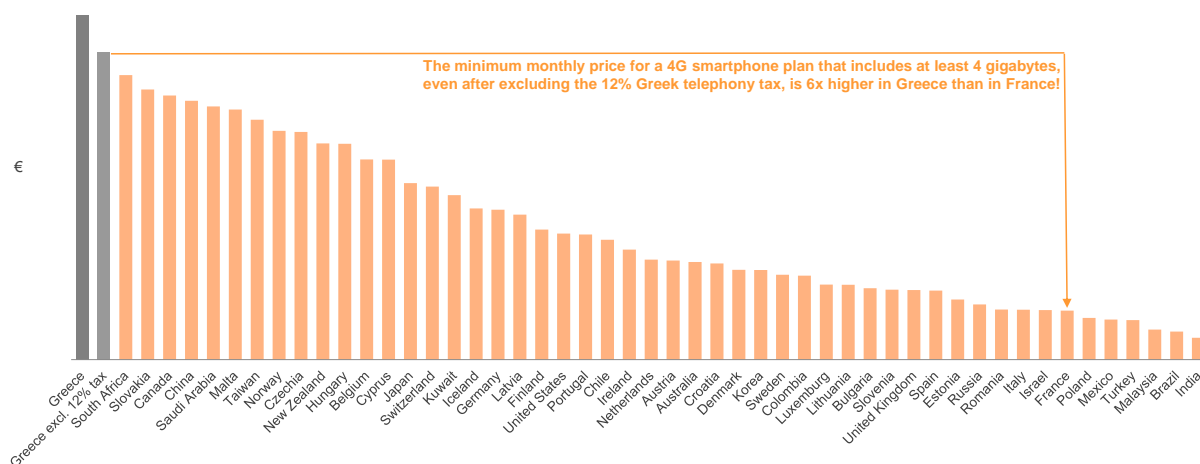


## Is Greece the most expensive mobile market in EU?

Even after excluding the mobile telephony tax Greek prices – of smartphone plans with 1, 2 or 3 gigabytes – were the highest in EU. For 4 gigabytes Greek prices were the most expensive among 51 European, American, Asia Pacific, Middle East and African countries. Greek consumers pay 5 to 6 times more per month than French consumers to buy smartphone plans with, 1, 2, 3 or 4 gigabytes!

Rewheel research PRO study, April 2021

MIN monthly price for 4 gigabytes - March 2021  
4G&5G smartphone plans with at least 1000mins and 100Mbit/s



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

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Rewheel has been tracking and analysing 4G prices in 41 EU & OECD countries, bi-annually, since 2014. In 2019 we added 5G prices and in 2020/21 we expanded the scope of our international comparison by adding another 10 countries to bring the total to 51 (more than 60% of the world's population). The 15<sup>th</sup> bi-annual release 1H2021<sup>1</sup> (March 2021 prices) contains 1943 smartphone plan tariffs, 722 mobile broadband plan tariffs and 276 wireless broadband plan tariffs. Those were sold by 179 mobile network operators, 93 operator discount brands and 64 MVNOs that were present in the 51 European, American, Asia Pacific, Middle East and African countries. The entire database includes ~25,000 4G and 5G tariff plans.

In March 2020, in a study<sup>2</sup> commissioned by the Hellenic Competition Commission (Ελληνική Επιτροπή Ανταγωνισμού), we showed that even after excluding the mobile telephony tax Greek prices were, if not the most expensive, among the most expensive in EU & OECD.

On the 25<sup>th</sup> of May 2020, the head of the Greek telecom sector regulator (EETT) Mr. Konstantinos Masselos, in an interview published<sup>3</sup> by Naftemporiki stated "Greece is not the cheapest but also not the most expensive mobile market...EETT must be focused in the price of plans with 2 - 3 GB and not in the price of plans with 20 – 30 GB or plans with unlimited data volume".

A year later, in a testimony Mr. Masselos gave in the Institutions and Transparency Committee of the Greek Parliament he stated<sup>4</sup> that "when comparing plans with low data volume Greece is much cheaper than the European average but the higher the data and voice volumes become Greece exceeds the average, we are not in everything expensive". Furthermore, Mr. Masselos in his testimony, reiterated that he disagrees with the price monitoring methodology followed by the Hellenic Competition Commission.

When citing the European average price Mr. Masselos was probably referring to the annual mobile price comparison studies<sup>5</sup> published by the European Commission which have consistently ranked Greece as one of the most expensive markets. The European Commission mobile price comparison studies are carried out using the OECD methodology<sup>6</sup>. In our March 2020 study, we explained that OECD's methodology while it captures the general price level has a number of limitations. The most significant limitation in the OECD methodology is the fact that plans sold by no.4 MNOs, by many no.3 MNOs, by most discount brands and by MVNOs are not included.

Put simply, the OECD methodology does not capture the lowest prices because, in most markets, the lowest prices are offered by the no.4 MNOs, discount brands or MVNOs. While this does not affect Greek prices since there is no 4<sup>th</sup> MNO, discount brands or any significant MVNOs present in the Greek market, it does affect significantly – lower prices – most other European markets (e.g., France, Italy, Germany).

4G&5G smartphone plans with at least 1000mins and	Greece ranking among 51 countries with 12% telephony tax included	Greece ranking among 51 countries with 12% telephony tax excluded	MIN monthly price EUR Greece with 12% telephony tax included	MIN monthly price EUR Greece with 12% telephony tax excluded	MIN monthly price EUR France	How many times the French MIN monthly price is lower than the Greek MIN monthly price
1GB	Most expensive	3rd most expensive				5
2GB	Most expensive	4th most expensive				5
3GB	2nd most expensive	4th most expensive				5
4GB	Most expensive	Most expensive				6

<sup>1</sup>[http://research.rewheel.fi/downloads/The\\_state\\_of\\_4G\\_5G\\_pricing\\_15\\_release\\_1H2021\\_PUBLIC\\_VERSION.pdf](http://research.rewheel.fi/downloads/The_state_of_4G_5G_pricing_15_release_1H2021_PUBLIC_VERSION.pdf)

<sup>2</sup>[https://www.epant.gr/files/2020/connectivity/Greek\\_mobile\\_data\\_connectivity\\_competitiveness\\_review\\_March2020\\_PUBLIC.pdf](https://www.epant.gr/files/2020/connectivity/Greek_mobile_data_connectivity_competitiveness_review_March2020_PUBLIC.pdf)

<sup>3</sup><https://www.naftemporiki.gr/finance/story/1602077/i-ellada-den-einai-i-akriboteri-agora-stis-tilepikoinonies>

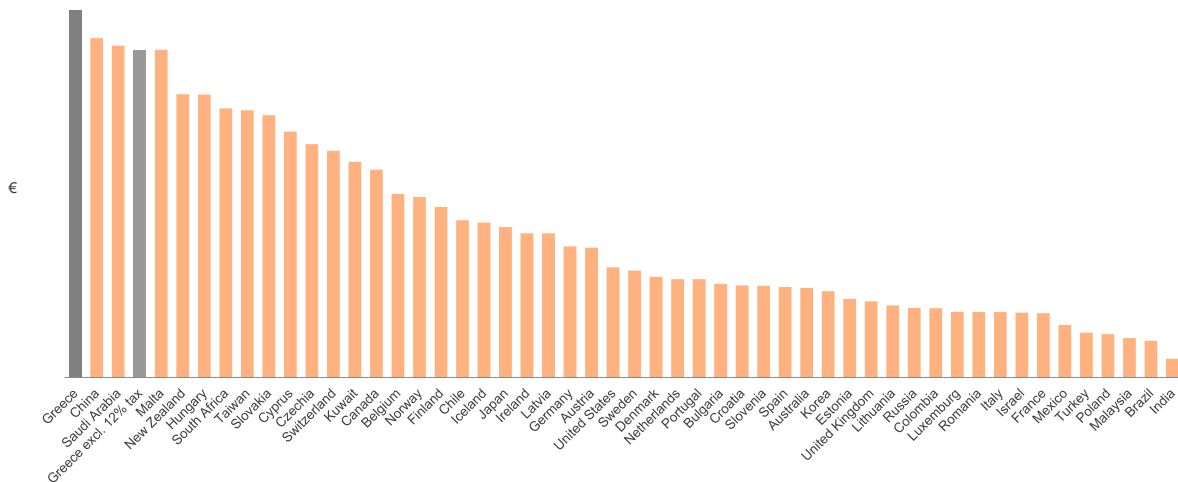
<sup>4</sup><https://www.ieidiseis.gr/eidiseis/tehnologia/item/B4619-proedros-eett-den-einai-kales-oi-times-syndesis-sto-internet-stin-ellada>

<sup>5</sup><https://digital-strategy.ec.europa.eu/en/library/mobile-broadband-prices-europe-2019>

<sup>6</sup>[http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=DSTI/CDEP/CISP\(2017\)4/FINAL&docLanguage=En](http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=DSTI/CDEP/CISP(2017)4/FINAL&docLanguage=En)

Herein we target the plans that EETT wrongly considers to be its regulatory focus (i.e., smartphone plans with tiny 1, 2 or 3 gigabyte allowance) and show that even after excluding the 12% mobile telephony tax Greek minimum monthly prices for such plans were the highest in EU. For 4 gigabytes Greek prices were the most expensive among 51 European, American, Asia Pacific, Middle East and African countries. Greek consumers pay 5 to 6 times more per month than French consumers to buy smartphone plans with, 1, 2, 3 or 4 gigabytes!

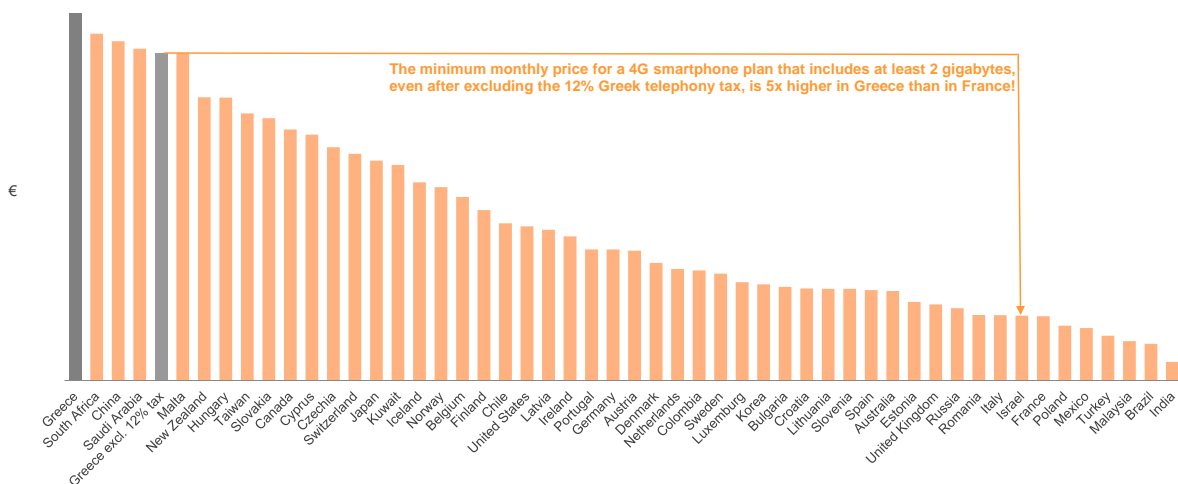
MIN monthly price for 1 gigabyte - March 2021  
4G&5G smartphone plans with at least 1000mins and 100Mbit/s



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

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MIN monthly price for 2 gigabytes - March 2021  
4G&5G smartphone plans with at least 1000mins and 100Mbit/s

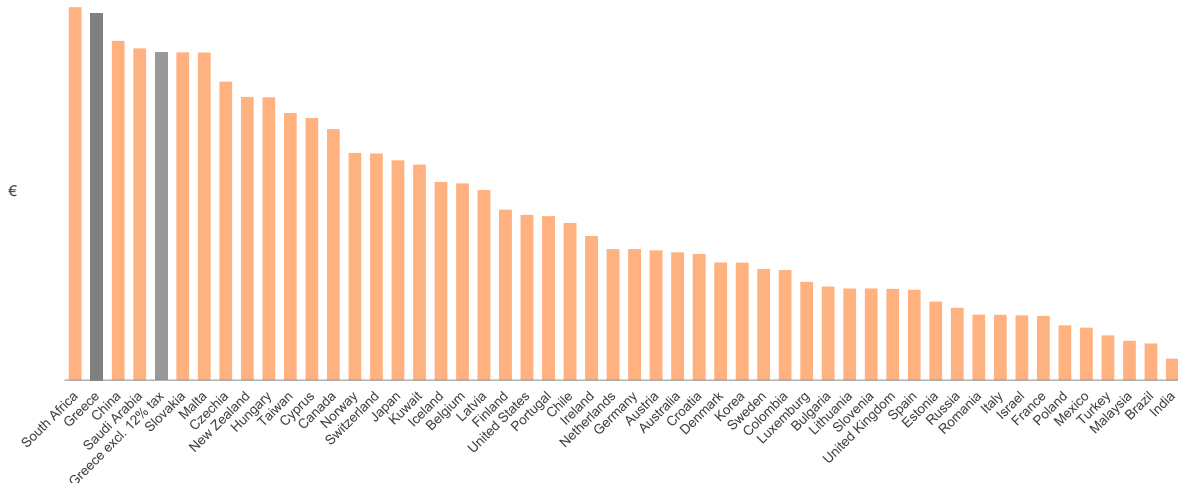


The minimum monthly price for a 4G smartphone plan that includes at least 2 gigabytes, even after excluding the 12% Greek telephony tax, is 5x higher in Greece than in France!

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

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MIN monthly price for 3 gigabytes - March 2021  
4G&5G smartphone plans with at least 1000mins and 100Mbit/s



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

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Mobile data pricing, mobile operator competitiveness rankings, market modelling & analysis, competition analysis (consolidation, 4 to 3 mobile mergers, effective remedies, new market entries), MNO near-zero marginal data cost, MVNO economics, mobile capacity-only play, mobile centric convergence (MCC) pro-competitive strategies and 4<sup>th</sup> MNO business case.

Founded in 2009 and incorporated in Finland, Rewheel is a privately owned independent telecom research firm and boutique management consultancy. Our clients are mobile network operators, telco groups, MVNO groups, competition authorities, telecom sector regulators, governments, global internet firms, mobile data-centric start-ups, PE and VC investors.

Rewheel has delivered management consultancy work for clients in the United Kingdom, United States, Ireland, Switzerland, Finland, Sweden, Belgium, Greece, Poland, Slovenia, Hungary, Russia, Romania.

The following authorities have acquired access to Rewheel's independent pricing, mobile market competitiveness, 4 to 3 merger analysis and remedy assessment research: The European Commission Directorate for Competition, the United States Department of Justice, the New York, California and many other US State Attorney General Offices, the national competition authorities of Canada, Australia, the Netherlands and Greece, the Ministry of Economic Affairs of the Netherlands, the Ministry of Industry and Trade of Czechia, the Korean Electronics and Telecommunication Research Institute, the sector regulators of the United Kingdom, Germany, France, the Netherlands, Ireland, Finland, Portugal, etc.

Rewheel's mobile data pricing, strategy, competition analysis, merger assessment, network economics, spectrum, profitability and competitiveness focused reports have been cited by OECD Economic Surveys, The Economist, The Financial Times, The New York Times, Reuters, Bloomberg, WSJ and publicly referenced by the UK telecoms regulator Ofcom, BIPT, Vodafone, Telefonica, Tele2, Elisa, DNA, GSMA, VPs of the EU Commission responsible for Competition, MEPs, IEEE, ITU.

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