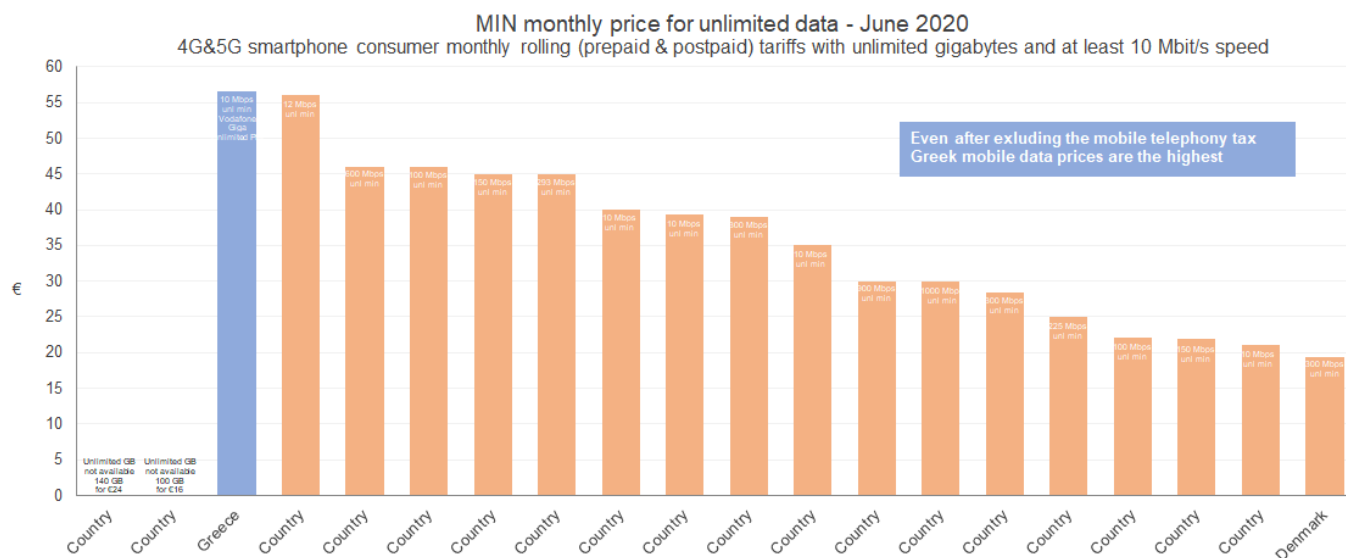


Monthly prices in Greece even after excluding the mobile telephony tax – for plans with unlimited data volume and 10 Mbit/s speed but as well for plans with microscopic data volumes of 2 to 3 gigabytes (currently the focus of the President of EETT Mr. Masselos) – were still the most expensive during June 2020.

Rewheel research PRO-report. This research note is a supplement to the March 2020 Rewheel research study commissioned by the Hellenic Competition Commission (Ελληνική Επιτροπή Ανταγωνισμού).



EU & OECD countries with a Eurostat reported general consumer price level that is higher than Greece's (i.e. more expensive countries than Greece). The bars depict the country minimum retail monthly price including VAT for a 4G or 5G tariff with unlimited GB and at least 10 Mbit/s. Greek prices exclude mobile telephony tax. Eligible tariffs were unbundled tariffs (excl. youth, etc.). All discounts were included e.g. discounts for selected customers such as new & number portability connections. Countries with the same monthly price are ranked using the tariff speed (higher speed lower ranking).

research.rewheel.fi ©

In May 2020 the Hellenic Competition Commission published¹ a Rewheel study on the competitiveness of the Greek mobile data connectivity market within the wider context of digital economy competitiveness. The study showed that Greek mobile data prices were and still are among the most expensive in the 41 EU & OECD countries. Moreover, the study concluded that the Greek mobile telephony tax is not a significant factor i.e. mobile data prices in Greece are very expensive even after the mobile telephony tax is excluded.

Following the publication of Rewheel's study the Hellenic Telecommunications and Post Commission (Εθνική Επιτροπή Τηλεπικοινωνιών και Ταχυδρομείων, EETT), Vodafone Greece and Wind Greece made a number of incorrect² and misleading claims regarding Rewheel's study methodology and findings. EETT and the Greek operators falsely claimed that Rewheel's study did not take into account prepaid offers, the discounts offered by the Greek operators to certain selected customers and the Greek mobile telephony tax (12% to 18%). The President of EETT Mr. Masselos in an interview³ he gave in Naftemporiki disputed the European Commission's and Rewheel's study findings by claiming that "...Greece is neither the cheapest nor the most expensive market in telecommunications..." and added that "...the current focus of EETT must be in the price of plans with 2 to 3 gigabytes rather than in plans with 20 to 30 gigabytes, unlimited data volume, or most gigabytes that 30 EUR buys...".

¹https://epant.gr/files/2020/connectivity/Greek_mobile_data_connectivity_competitiveness_review_March2020_PUBLIC.pdf

²http://research.rewheel.fi/downloads/Rewheel_response_to_EETT_Vodafone_Greece_09052020.pdf

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

A week after Mr. Masselos stated in Naftemporiki that the current focus of EETT must be on the price of plans with 2 to 3 gigabytes Vodafone Greece launched smartphone plans with unlimited data volume with 2 Mbit/s, 10 Mbit/s and maximum available speeds and stated⁴ that “Vodafone brings a new era with unlimited data for everyone...by responding to the real needs of society and the economy and accelerating the transition to the country’s digital tomorrow”.

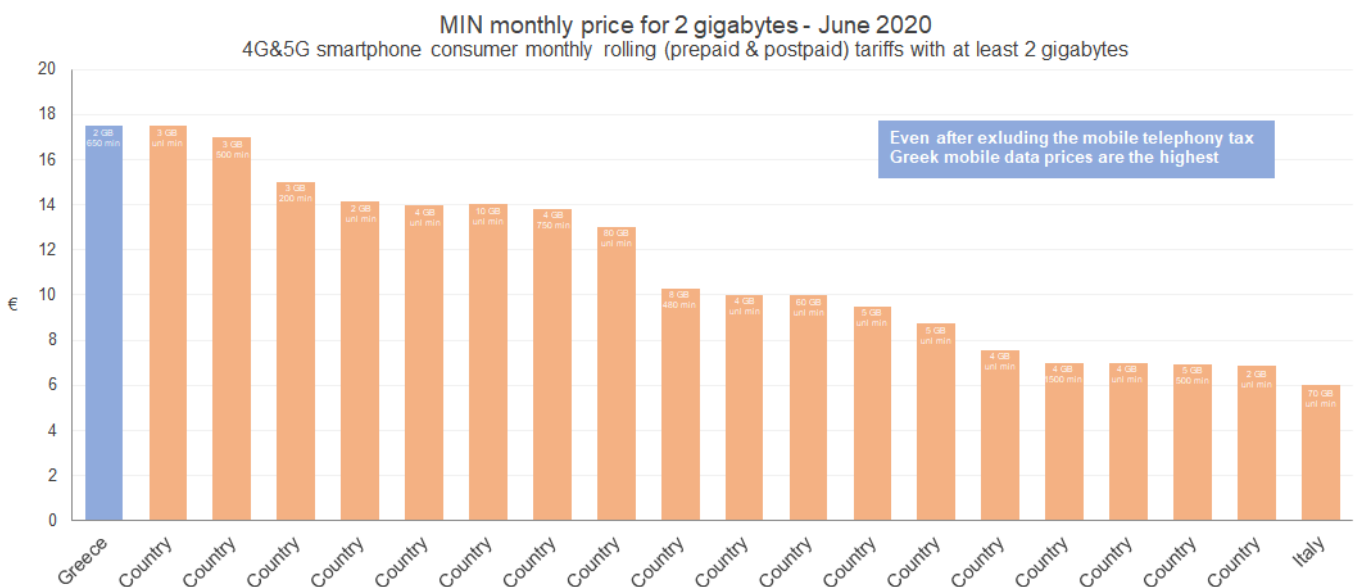
June 2020 price benchmark – Greece versus 19 EU & OECD countries

Triggered by the comments of the President of EETT Mr. Masselos concerning the current focus of EETT (i.e. the prices of plans with 2 to 3 gigabytes) and the introduction of unlimited data volume plans by Vodafone Greece we compared in this supplementary study the June 2020 Greek mobile data prices against the prices of the 19 other EU & OECD countries where the general consumer price level is higher than in Greece. We selected countries where the overall consumer price level is higher than in Greece to preempt a counter argument that mobile prices in other countries are lower than in Greece because consumer prices in those countries are generally lower.

In this supplementary study we used three comparative metrics. The minimum monthly price of 4G&5G voice & data (smartphone) plans that included at least 2 gigabytes, 3 gigabytes and unlimited gigabytes. All unbundled consumer monthly rolling prepaid & postpaid plans were eligible for this comparison as long as they included some national minute allowance (i.e. plans with no included national minute allowance were excluded). For this June 2020 comparison we took into account all the special discounts offered by the Greek and as well by the operators in the rest 19 EU & OECD countries to new number and number portability connections (e.g. Cosmote’s and Vodafone’s 45% discounts). More importantly for this June 2020 comparison we have excluded the mobile telephony tax from the monthly price of Cosmote’s, Vodafone’s and Wind’s plans.

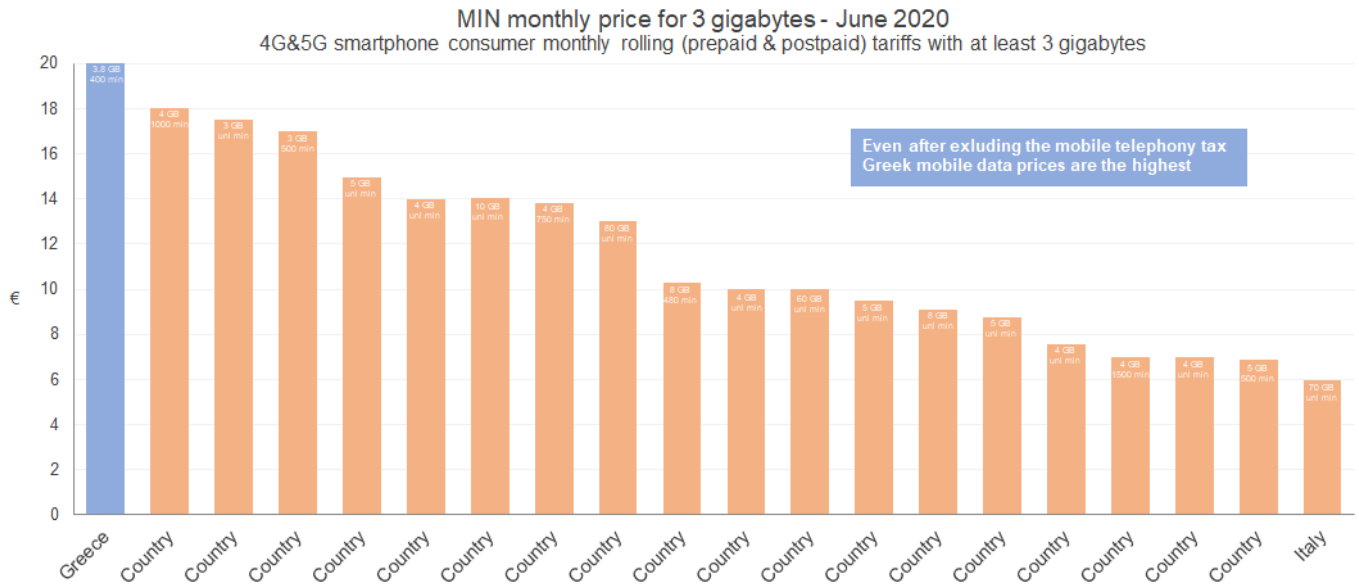
Our objective with this supplementary study was to determine the level of Greek mobile data prices after taking into account all prepaid & postpaid plans, all applicable maximum discounts and after excluding the Greek mobile telephone tax.

As seen in the charts below even after taking into account all prepaid & postpaid monthly rolling plans, all discounts and even after excluding the mobile telephony tax Greek mobile data prices for 2, 3 and unlimited gigabytes are still the highest among the group of the 19 EU & OECD countries (‘developed economies with consumer price level that is higher than that of Greece’).

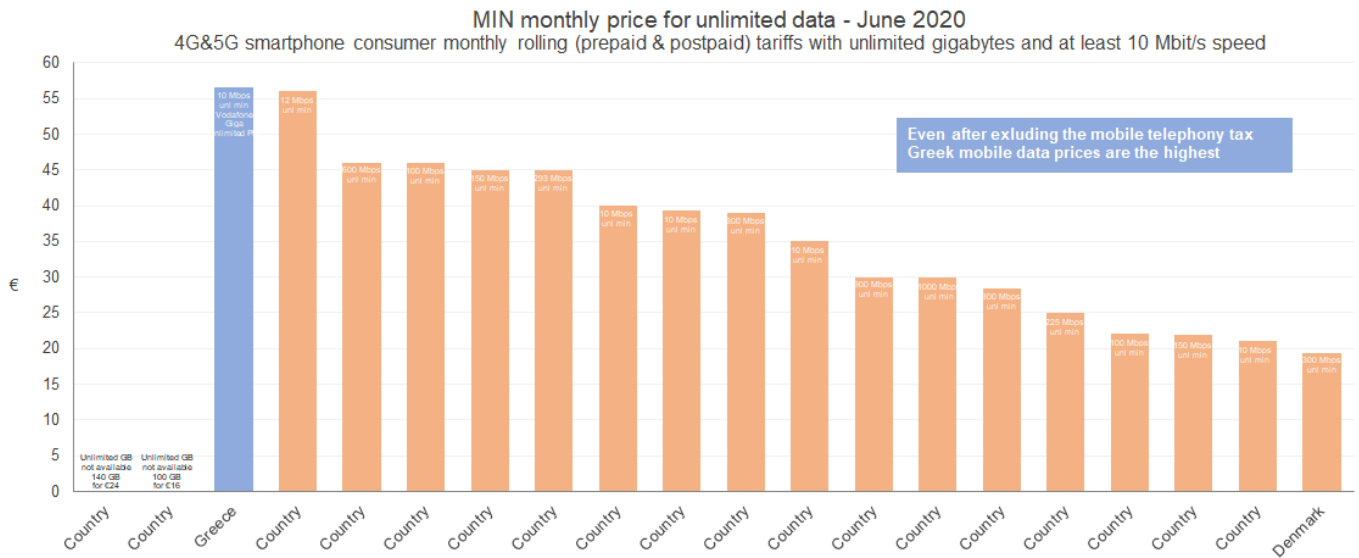


EU & OECD countries with a Eurostat reported general consumer price level that is higher than Greece’s (i.e. more expensive countries than Greece). The bars depict the country minimum retail monthly price including VAT for a 4G or 5G tariff with at least 2 GB. Greek prices exclude mobile telephony tax. Eligible tariffs were unbundled tariffs (excl. youth, etc.). All discounts were included e.g. discounts for selected customers such as new & number portability connections. Countries with the same monthly price are ranked first using the included GB allowance (higher GB allowance lower ranking) and then by the included minute allowance. research.rewheel.fi ©

⁴<https://www.vodafone.gr/vodafone-ellados/digital-press-office/delta-typou/20200603-h-vodafone-fernei-mia-nea-epochi-me-aperiorista-data-gia-olous-mesa-apo-ta-nea-programmata-vodafone-giga-unlimited-kai-symvallei-sto-psifiako-agma-tis-elladas/>



EU & OECD countries with a Eurostat reported general consumer price level that is higher than Greece's (i.e. more expensive countries than Greece). The bars depict the country minimum retail monthly price including VAT for a 4G or 5G tariff with at least 3 GB. Greek prices exclude mobile telephony tax. Eligible tariffs were unbundled tariffs (excl. youth, etc.). All discounts were included e.g. discounts for selected customers such as new & number portability connections. Countries with the same monthly price are ranked first using the included GB allowance (higher GB allowance lower ranking) and then by the included minute allowance. research.rewheel.fi ©



EU & OECD countries with a Eurostat reported general consumer price level that is higher than Greece's (i.e. more expensive countries than Greece). The bars depict the country minimum retail monthly price including VAT for a 4G or 5G tariff with unlimited GB and at least 10 Mbit/s. Greek prices exclude mobile telephony tax. Eligible tariffs were unbundled tariffs (excl. youth, etc.). All discounts were included e.g. discounts for selected customers such as new & number portability connections. Countries with the same monthly price are ranked using the tariff speed (higher speed lower ranking). research.rewheel.fi ©