

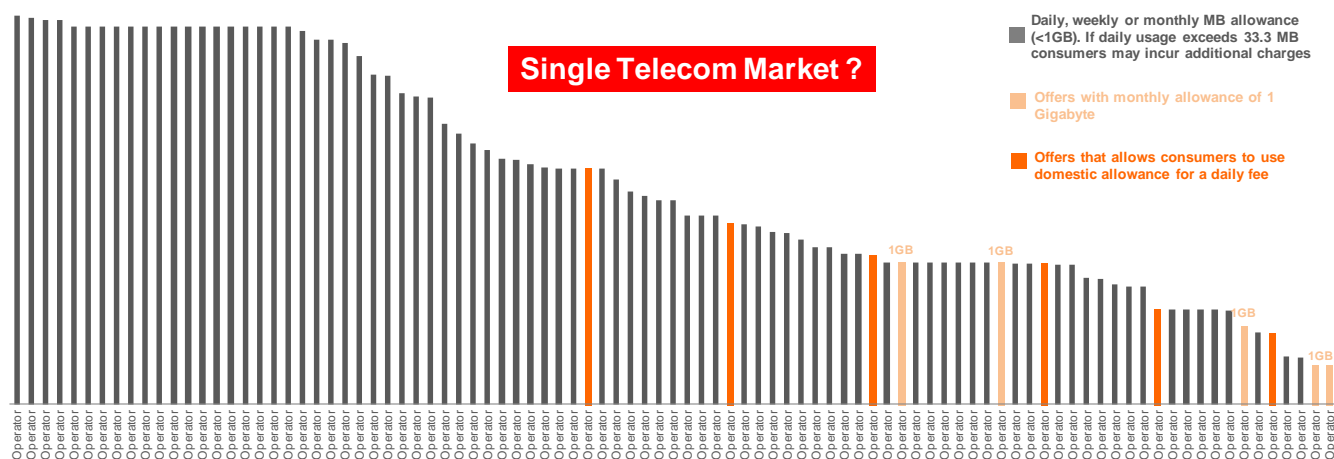
## How much do EU consumers pay to use a Gigabyte of mobile internet on their smartphone while roaming in EU28?

Rewheel/Digital Fuel Monitor public research note, 3<sup>rd</sup> December 2014

- European consumers are still paying exorbitant roaming fees to use mobile internet while roaming in EU28
- Many mobile operators charge mobile internet usage (Gigabyte) roaming fees that are well below the EU regulated wholesale cap of €50 per Gigabyte (5 cents per Megabyte)
- Two operator groups have truly abolished mobile internet Gigabyte usage roaming charges (no fair usage loopholes) in some of their smartphone tariff plans and in selected countries (mainly across their EU28 footprint)
- Some operator groups have launched EU28 wide mobile internet smartphone plans (restrictions of use apply)

**Exhibit 1: Operator lowest roaming price for using one Gigabyte (spread equally as max 33.33MB per day) of mobile internet on smartphones while roaming in EU28**

### How much EU consumers pay to use a Gigabyte of mobile internet in their smartphone while roaming in EU28?



Source: Digital Fuel Monitor

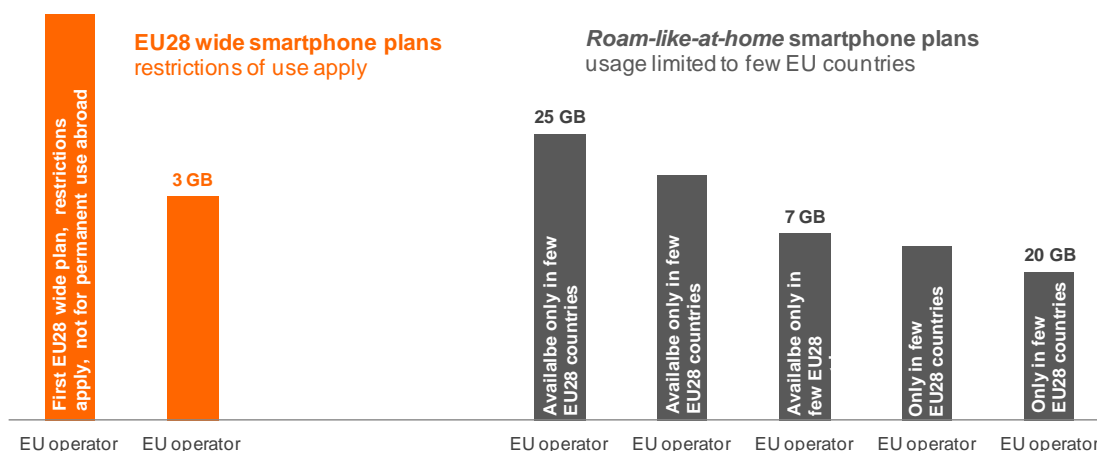
Exhibit 1 above includes smartphone roaming tariffs that are valid in all of EU28 markets. Smartphone tariffs such as Vodafone's UK EuroTraveller<sup>1</sup> that allows end-users to use their domestic plan allowance when they roam in EU28 **but for a daily fee** of (e.g. £3 for Vodafone UK) and pay domestic out-of-bundle rates if they go over their cap while roaming are included in Exhibit 1.

In Exhibit 2 below we present selected EU28-wide smartphone tariffs (yes such things do exist!) and as well smartphone tariff plans that offer at no additional cost *roam-like-at-home* mobile internet roaming in selected countries (not EU28-wide).

<sup>1</sup> <http://www.vodafone.co.uk/shop/pay-monthly/travelling-abroad/vodafone-eurotraveller/index.htm>

**Exhibit 2: Selected EU28-wide and *roam-like-at-home* smartphone plans (that do not carry additional charges for the roaming functionality)**

**EU28 wide and roam-like-at-home smartphone plans**



Source: Digital Fuel Monitor

The EU28 mobile internet roaming usage (Gigabyte) operator price rankings 4Q2014 (pdf) file is available to download at the DFMonitor Analysis and Insight section<sup>2</sup>.

An in-depth analysis of the roaming and other barriers to Europe’s open internet (telecom) market will be the subject of a follow up research note.

<sup>2</sup> <http://www.dfmonitor.eu/insights/>