Rewheel
PRO-COMPETITIVE TELECOM STRATEGY

DIGITAL FUEL MONITOR
MONITORING MOBILE CONNECTIVITY COMPETITIVENESS
By Rewheel

EU's 5G competition challenge

DFMonitor's latest, July 2016, sampling of 4G smartphone internet access data caps in the European Union shows that a handful of big telco groups – with vested interests in fixed-line broadband – impose very restrictive mobile internet usage caps. This raises serious concerns that these telco groups – that tightly control most EU national markets – will not be incentivised to sell competitively priced 5G internet access.

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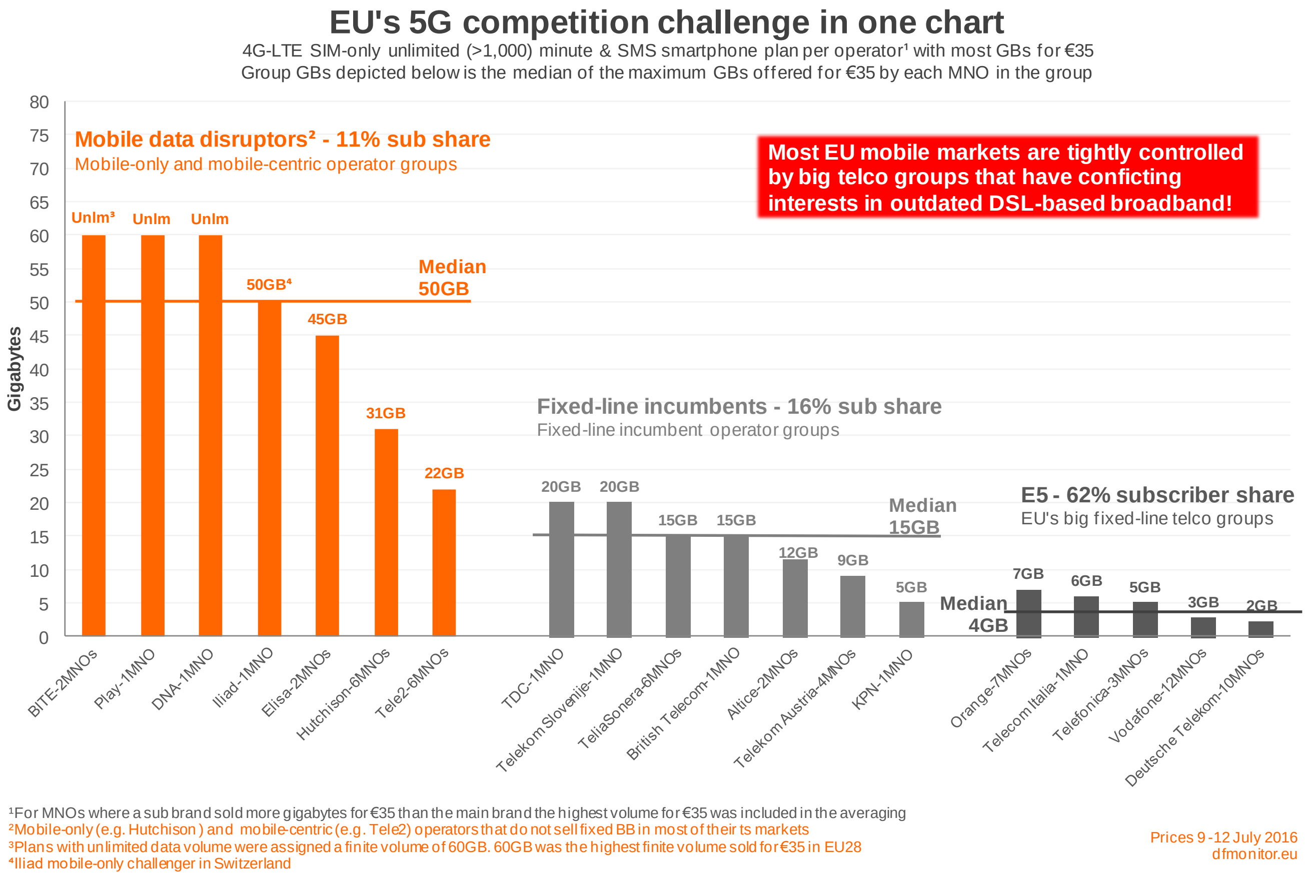
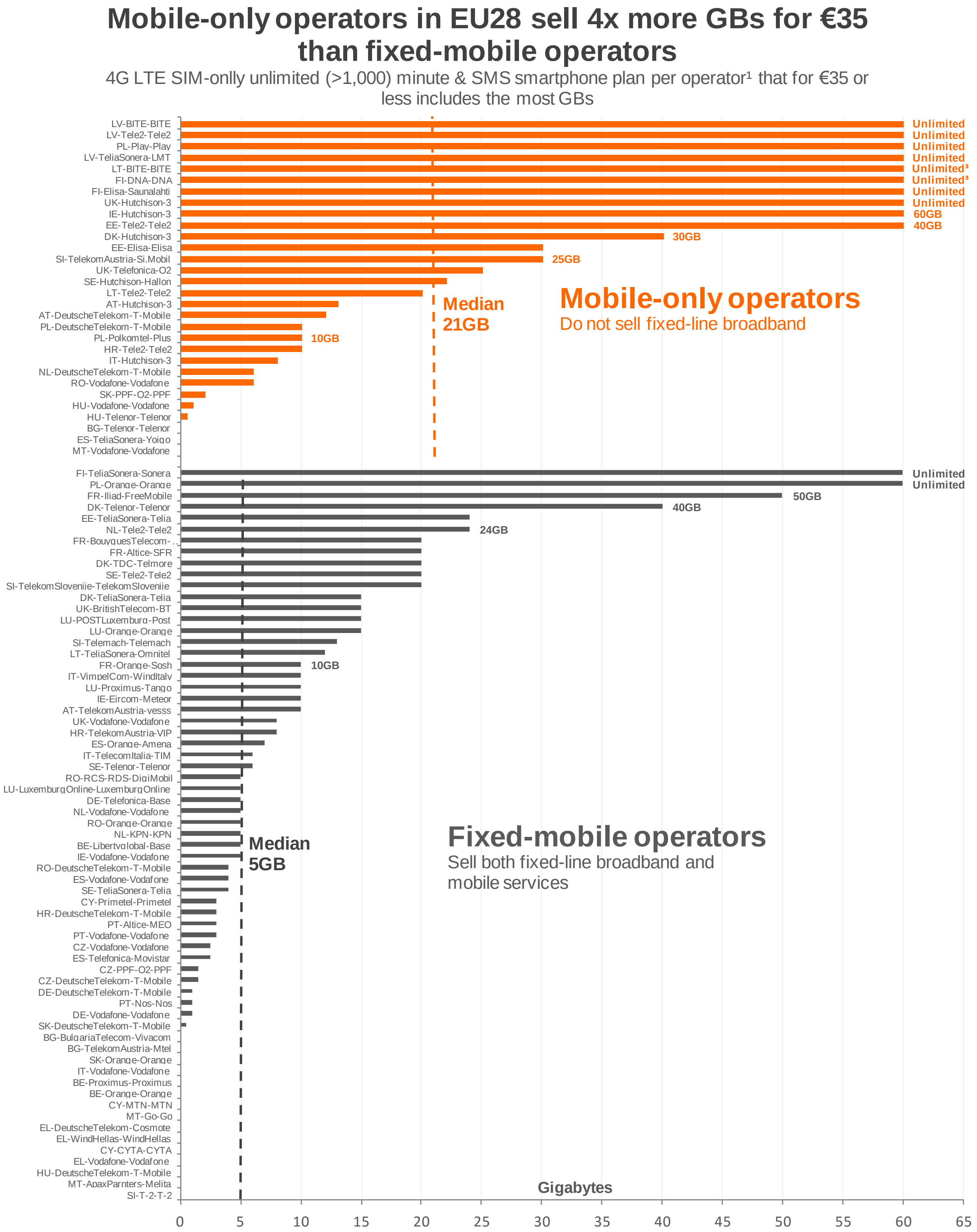


- Mobile data disruptor operator groups in EU28 sell in average 12 times more smartphone GBs for €35 than big fixed-line telco groups (Vodafone, Deutsche Telekom, Orange, Telefonica and Telecom Italia).
- Mobile-only operators in EU28 sell in average 4 times more smartphone GBs for €35 than fixed-mobile operators.
- Most EU mobile markets are tightly controlled by big telco groups that have conficting interests in outdated DSL-based broadband.
- In markets where mobile data disruptor operators are present they control only a small fraction (typically around 10%) of the assigned 2G, 3G, and 4G spectrum resources.
- Fixed-line operator telco groups control and heavily underutilize[1], due to very high GB prices, most of the assigned spectrum.
- National regulators should promote infrastructure based competition by setting aside 5G spectrum for challenger (existing or new) mobile-only and/or mobile-centric operators.

[1] DFMonitor will publish during 2H2016 an analysis of EU28 operator spectrum utilization (e.g. gigabytes used per MHz of spectrum hold)

Mobile-only operators in EU28 sell in average 4 times more smartphone GBs for €35 than fixed-mobile operators



¹For MNOs where a sub brand sold more gigabytes for €35 than the main brand the highest volume for €35 was included in the averaging
²Plans with unlimited data volume were assigned a finite volume of 60GB. 60GB was the highest finite volume sold for €35 in EU28
³DNA and Elisa Finland actively market their €20 unlimited 4G mobile broadband in areas that they do not offer fixed-line broadband

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Please do let us know if you think that we missed a tariff with higher GB allowance that met the criteria[2], at the time of data collection, by emailing us at contact@dfmonitor.eu

[2] http://www.dfmonitor.eu/about/