

Large-Screen Mobile Broadband Prices in the EU 2017

Abstract

This is the fifth year in a row that Infrapont has prepared the report on Large-Screen Mobile Broadband Prices in the EU. The study covers plans offered by all mobile network operators in 30 European countries (the 28 EU member states, as well as Norway and Switzerland) and includes all large-screen mobile broadband post-paid plans which were publicly advertised on the operators' websites. In total, 355 such packages were offered by 100 mobile network operators.

The study concerns standalone plans for large-screen devices, such as laptops, notebooks and tablets, with the help of mobile data sticks or data modems. Small-screen (smartphone) internet plans, which are typically offered in a package together with voice services, are explicitly excluded, as these form part of a different market segment, that of mobile broadband. The report also excludes services that were not advertised publicly, offers aimed at business users, prepaid plans and plans offered by MVNOs and resellers.

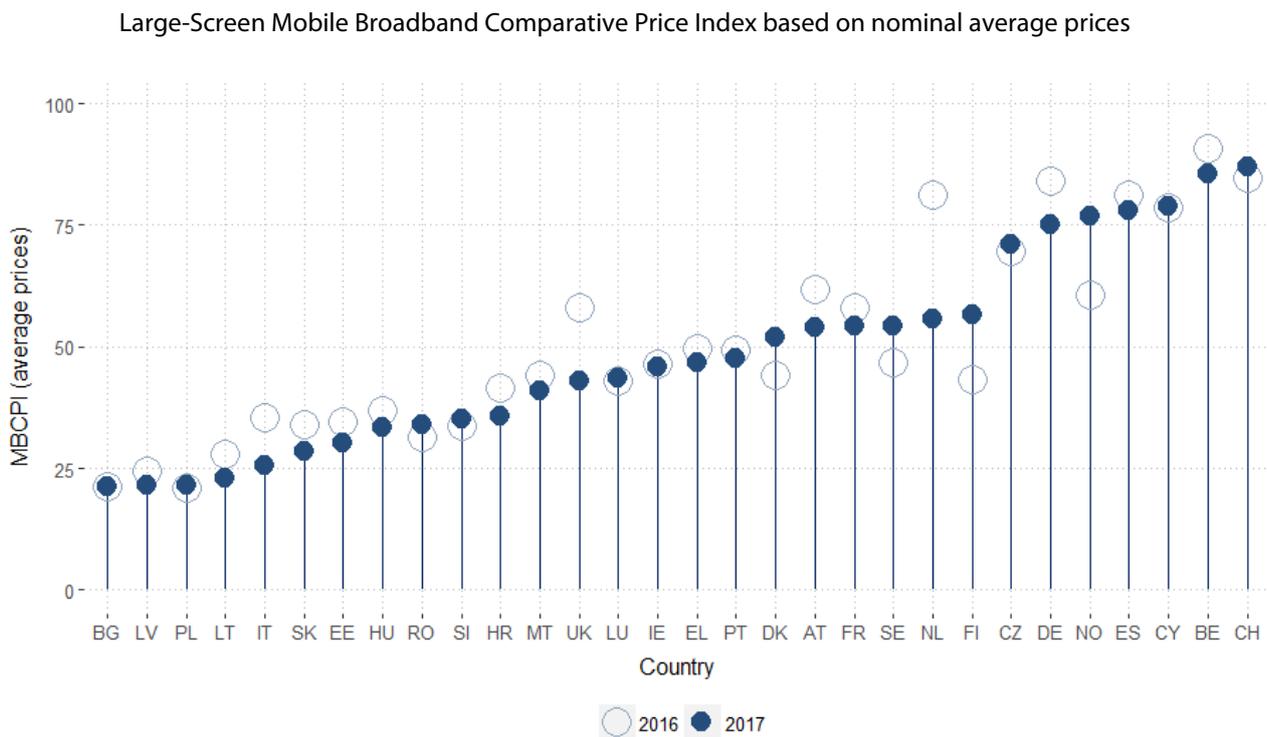
The central aim of the report is to enable a comparison of large-screen mobile broadband prices in Europe. The report presents data on the availability of plans with various data allowances and other features, while also highlighting changes from the previous year. In addition to the description of the European landscape, a more in-depth comparison, based on the Large-Screen Mobile Broadband Comparative Price Index, is presented and discussed.

The report also looks at the changes in the relative positions of the member states with regard to price, focusing especially on countries where a market entry or a merger has occurred over the past few years.

SOME HIGHLIGHTS

OVERALL PRICE LEVEL COMPARISONS

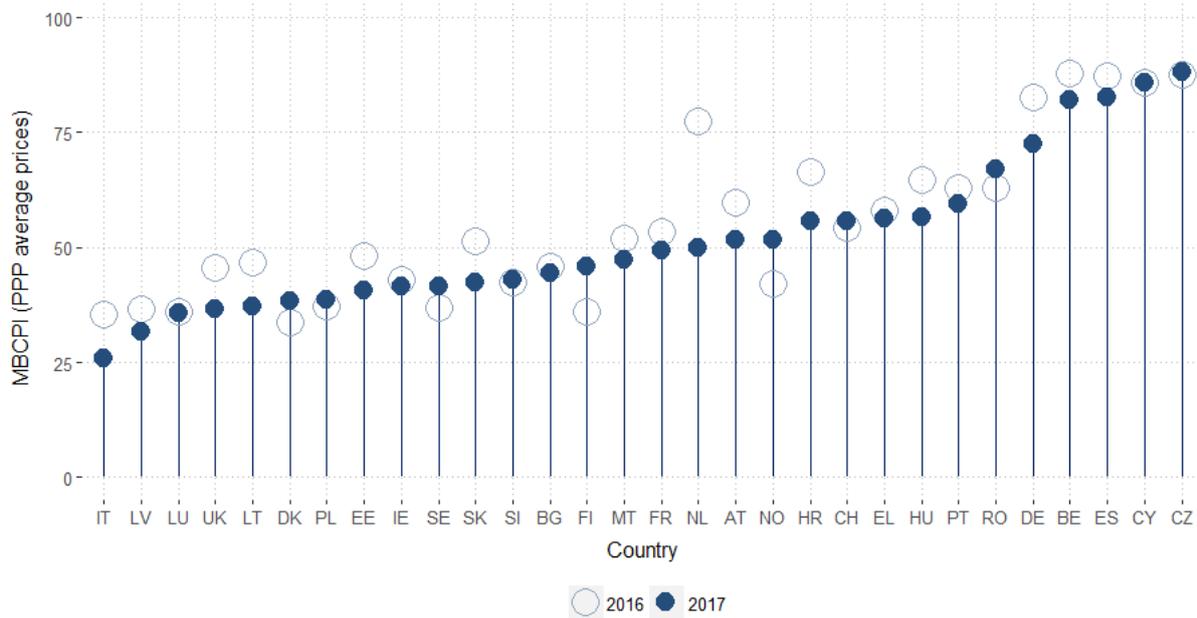
Overall comparisons are based on the Large-Screen Mobile Broadband Comparative Price Index, developed by Infrapont. The index shows a unified picture, both for nominal and PPP-adjusted prices.



Source: Infrapont analysis

- The best performers in 2017 in the nominal euro PPP comparison are mostly CEE countries, the only odd one out being Italy, an old member state.
- Switzerland, Belgium, Cyprus, Spain, Norway, Germany and as the only CEE country, the Czech Republic are among the most expensive on the list.
- Price levels are decreasing, and increases mostly result from exchange rate changes or structural changes in the plans offered.

Large-Screen Mobile Broadband Comparative Price Index based on PPP average prices



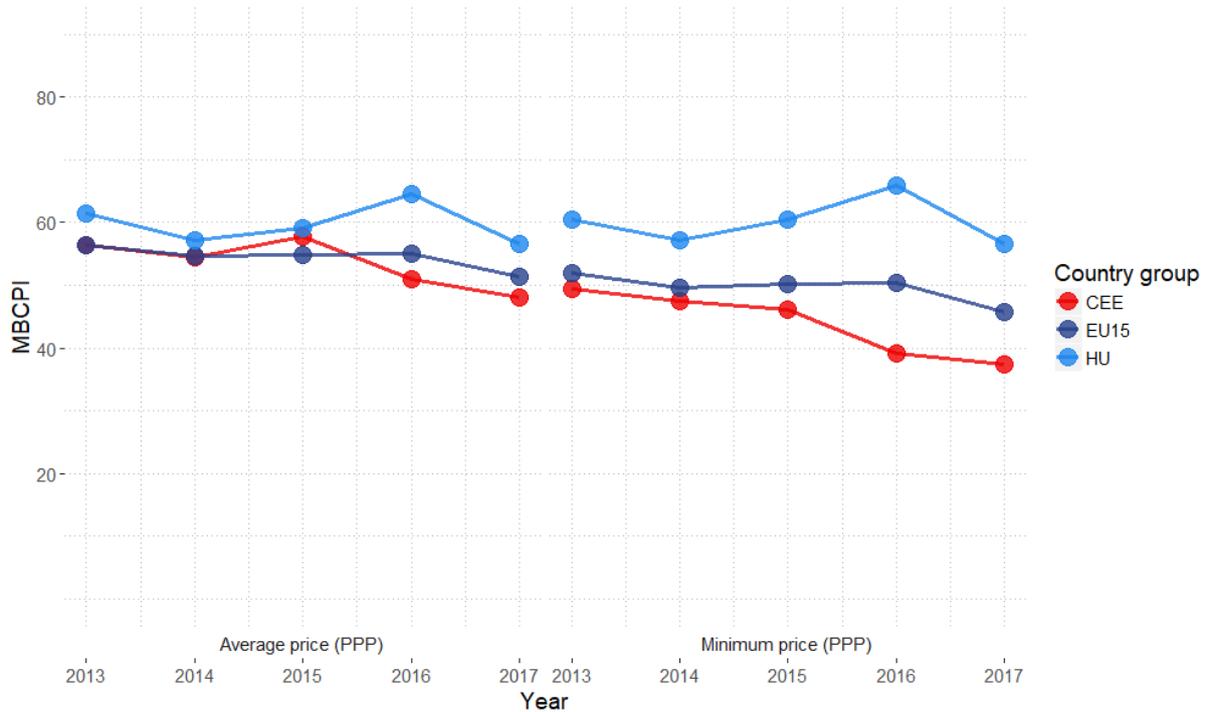
Source: Infracont analysis

- Italy, the Baltic and the Scandinavian countries, Luxembourg, the UK, Poland, Ireland, Slovakia and Bulgaria are among the best performers in 2017, according to the euro PPP comparison.
- The price levels of the Czech Republic, Cyprus, Spain, Belgium and Germany are still the highest. Romania and Hungary are closer to the expensive end of the list.

PRICE DEVELOPMENTS

The study discusses overall price developments between 2013 and 2017 and compares price trends in Hungary with the 10 CEE and the original EU15 countries.

Large-screen Mobile Broadband Comparative Price Index changes from 2013 to 2017 – Hungary in comparison



Source: Infrapont analysis

Last year, Hungarian prices appeared to follow the EU15 and CEE10 downward trend, but they are still higher than the average of both groups. The difference is larger in the case of minimum prices.

Contents

1	Introduction	1
2	The main features of large-screen mobile broadband plans	2
2.1	Mobile broadband packages in EU countries	2
2.2	Consumer baskets for price comparison	4
2.3	Calculation of the prices of consumer baskets	6
3	Results of price comparisons between consumer baskets	10
3.1	Low user baskets	11
3.2	Medium user baskets	15
3.3	High user baskets	18
4	Overall price rankings	21
4.1	Calculation of the Large-screen Mobile Broadband Comparative Price Index	22
4.2	Price comparisons based on nominal prices	23
4.3	Price comparisons based on euro purchasing power parities	25
5	Large-screen mobile broadband prices in a wider context	32
5.1	Prices and other variables	32
5.2	Price developments between 2013 and 2017	38
5.3	Summary of the findings	43
6	Appendix	44

The study reflects Infrapont's views on the topic of large-screen mobile broadband prices in Europe, and its goal is to contribute to the current policy and regulatory debate. The conclusions set forth in the study are based on independent research and publicly available material. Although every effort has been made to ensure the accuracy of the material and the integrity of the analysis presented, Infrapont accepts no liability for any actions taken on the basis of its contents.

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Infrapont is a Hungarian economic consulting company, a specialist in regulatory and competition economics.

The study (43 pages) and Appendix (20 pages) can be purchased.

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