

Arthur D Little

**Voice and MBB Services
Tariff Plans Benchmarking
Europe, US, Middle East**

Second Half 2015, 4th Edition

December 2015

Arthur D. Little
www.adlittle.com



Arthur D. Little presents the 4th Edition of MNOs tariff plans benchmarking study

Situation



- Arthur D. Little carried out the 4th Edition MNOs Tariff Plans desk study to analyze and benchmark the trends and the “state of the art” of tariff plan landscape for Data and Voice commercial offers

Questions



- What are the different price strategies among MNOs for each analyzed country?
- Are there different pricing trends and strategies across different countries?
- Are plans differentiated in terms of Value Added Services offered ?
- What is the current offer for 3G vs. LTE? Is there any specific trend?

Analysis Limitations

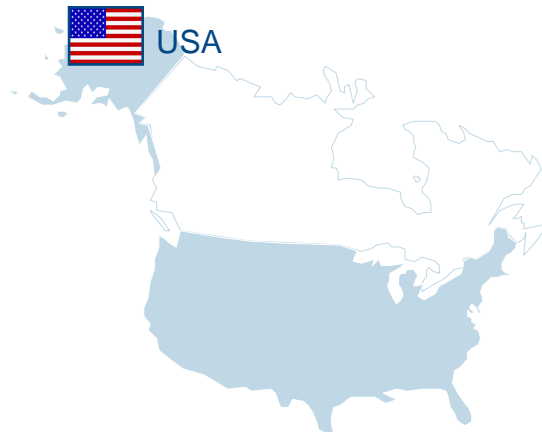


- The benchmark analysis was executed considering a set of comparable Voice and Data tariff plans (Unlimited Voice and Sms, no device subsidies, consumer segment)
- The study scope is referred to 17 Countries (USA, Western Europe and Middle East)
- The study considers a snapshot at October 2015, tracing trends back to December 2013

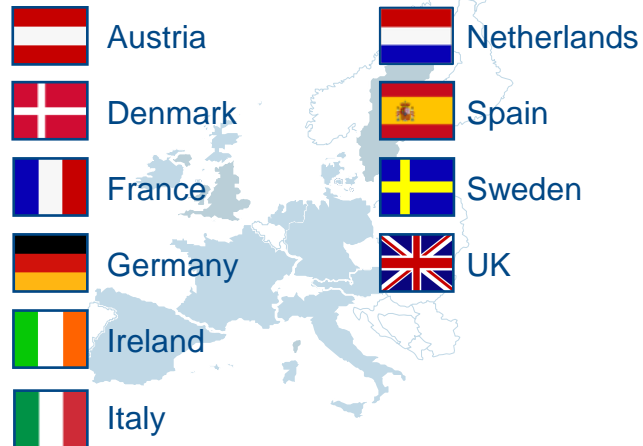
Agenda

- 1 Context & Methodology
- 2 Executive Summary
- 3 Tariff Benchmarking per Country

North America



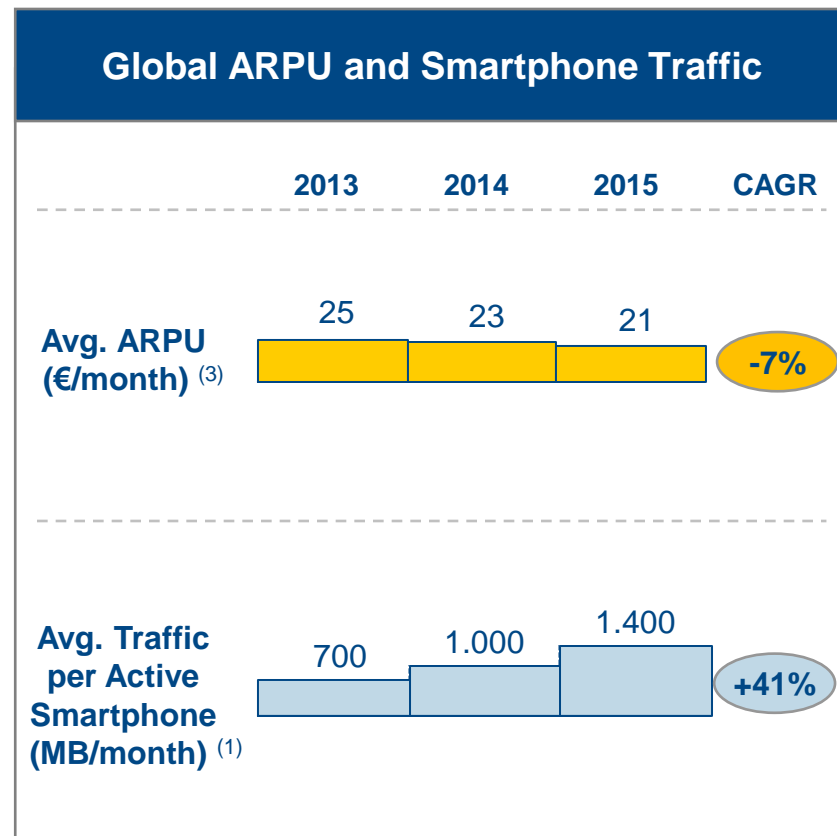
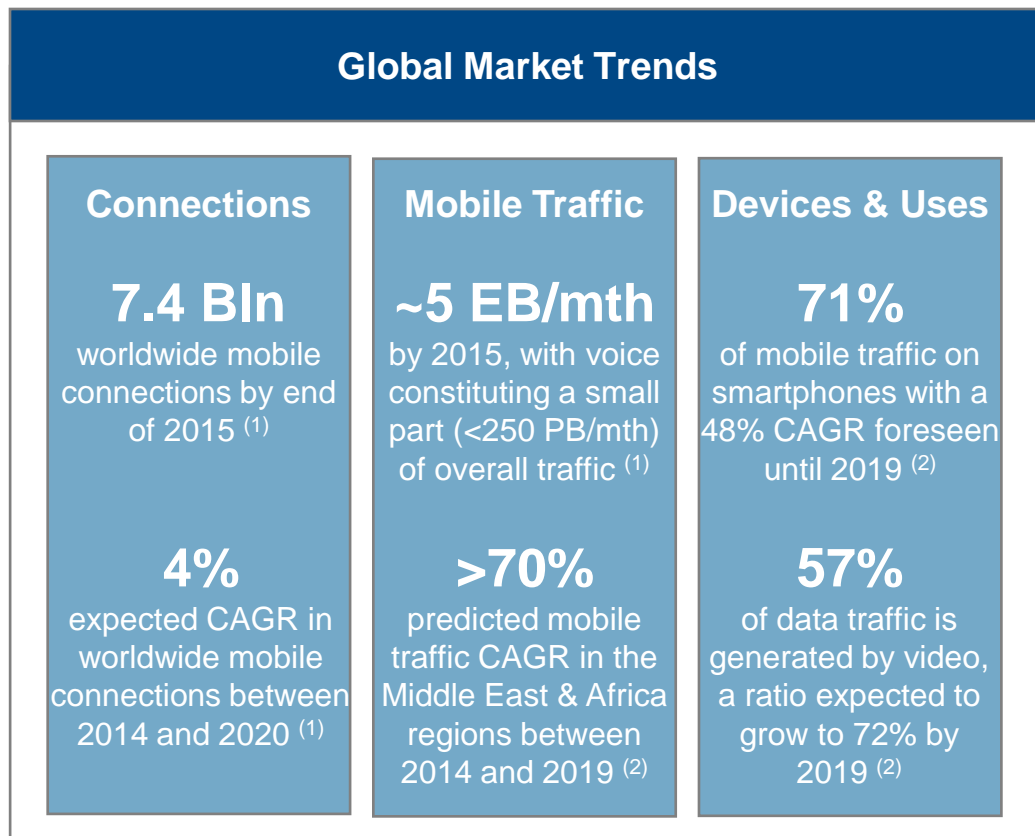
Western Europe



Middle East



The mobile industry keeps experiencing a generalized increase in both connections and traffic, remarkably evident in smartphone and video data, yet not paired with an improvement in ARPU

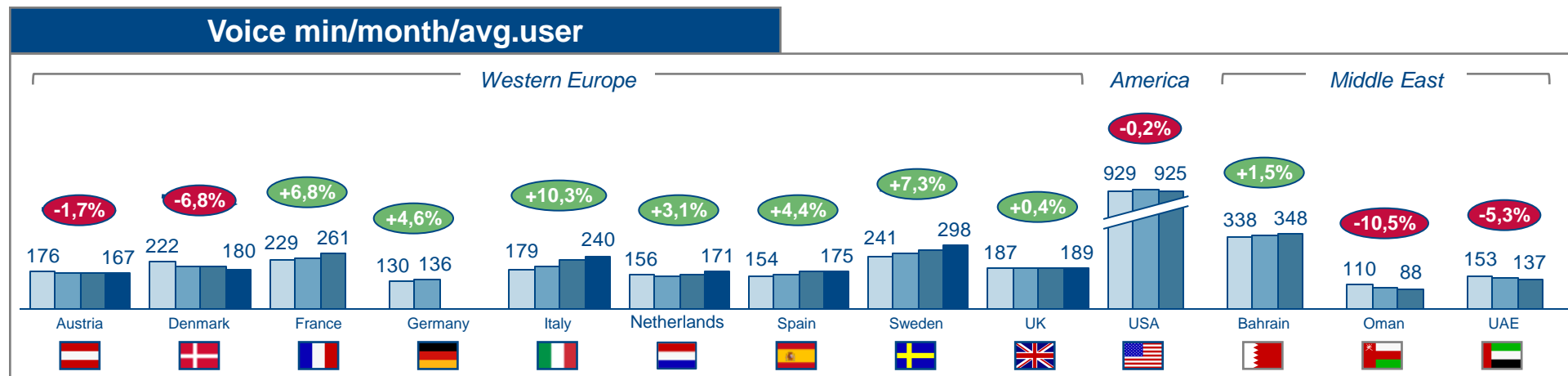
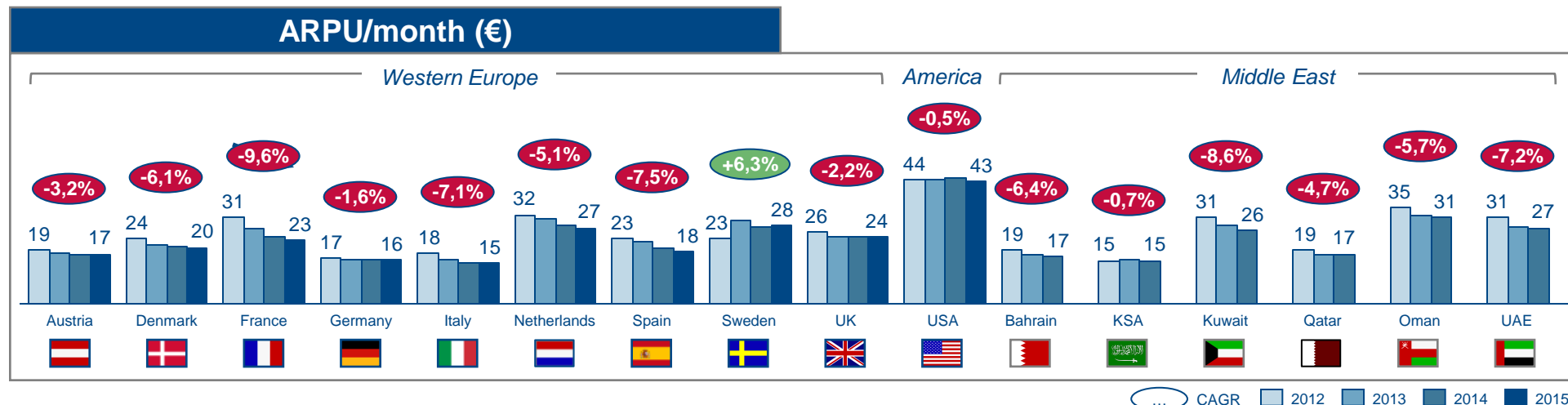


Industry studies show a generalized increase in mobile connections (7.4 Bln as of 2015) and in mobile traffic (~5 EB/mth), mostly generated by smartphones (71%) and driven by video streaming (57%). These trends are, however, accompanied by a decreasing tendency in Average Revenue per User.

Source: 1) Ericsson Mobility Report Nov 2014, Nov. 2015; 2) Cisco VNI Mobile, 2015; 3) Merrill Lynch Bank of America Global Wireless Matrix - Global Selection of Countries among APAC, Europe, North America, Emerging Asia, EEMEA e LATAM Regions (Note: Dollar - Euro exchange rate 0.896 at 31.09.2015)

1 Context and Methodology - ARPU and average Voice usage trends for analyzed Countries

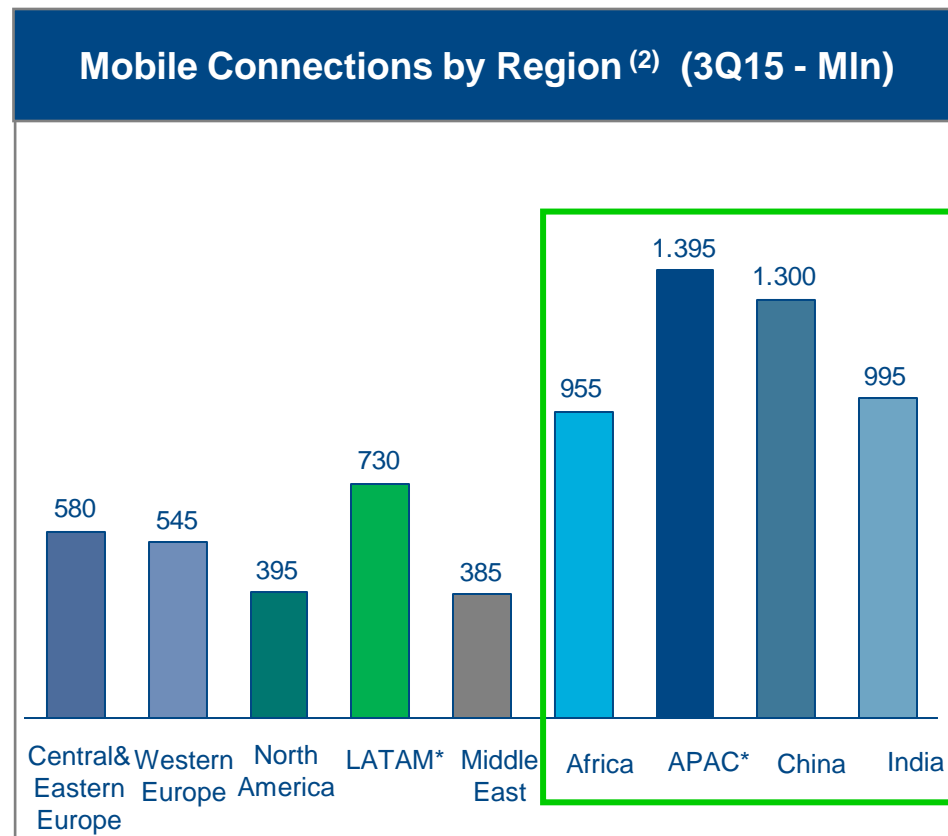
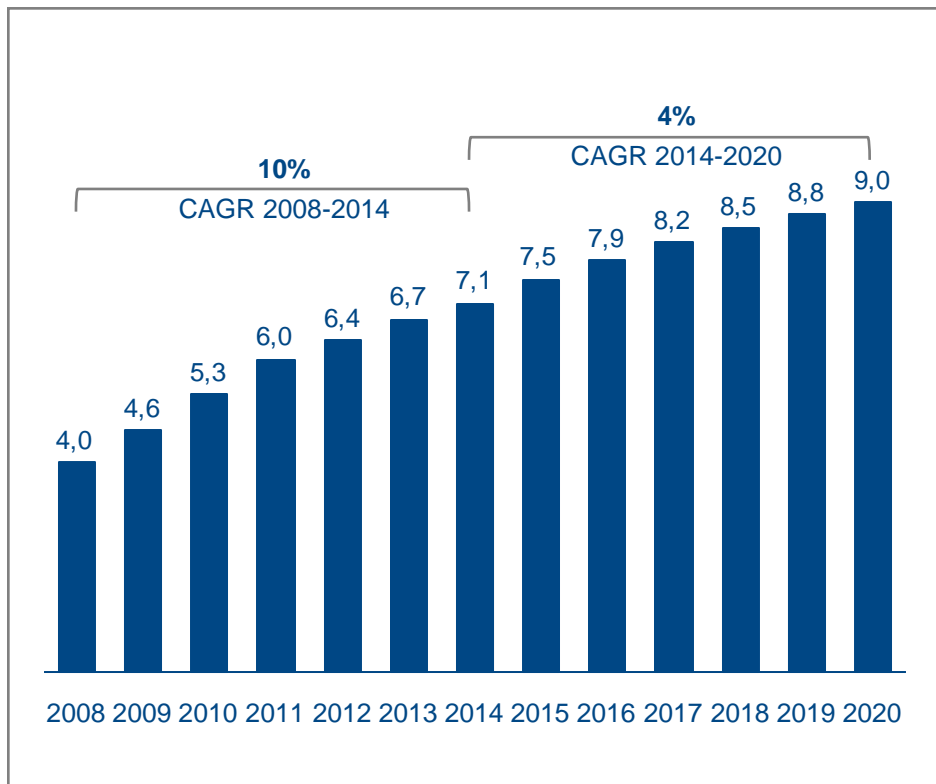
Average Revenue per User shows a decreasing trend, while voice consumption maintains a slightly increasing tendency



Source: Merrill Lynch Bank of America Global Wireless Matrix 2Q15, Middle Eastern TRA's websites, Arthur D. Little Analysis (Note: Dollar – Euro exchange rate 0.896 at 31.09.2015)

1 Context and Methodology - Global Mobile Connections

After a steep increase between 2008 and 2014, Mobile Connections will keep growing smoothly, with developing countries holding for most connections, especially in African & Asian regions

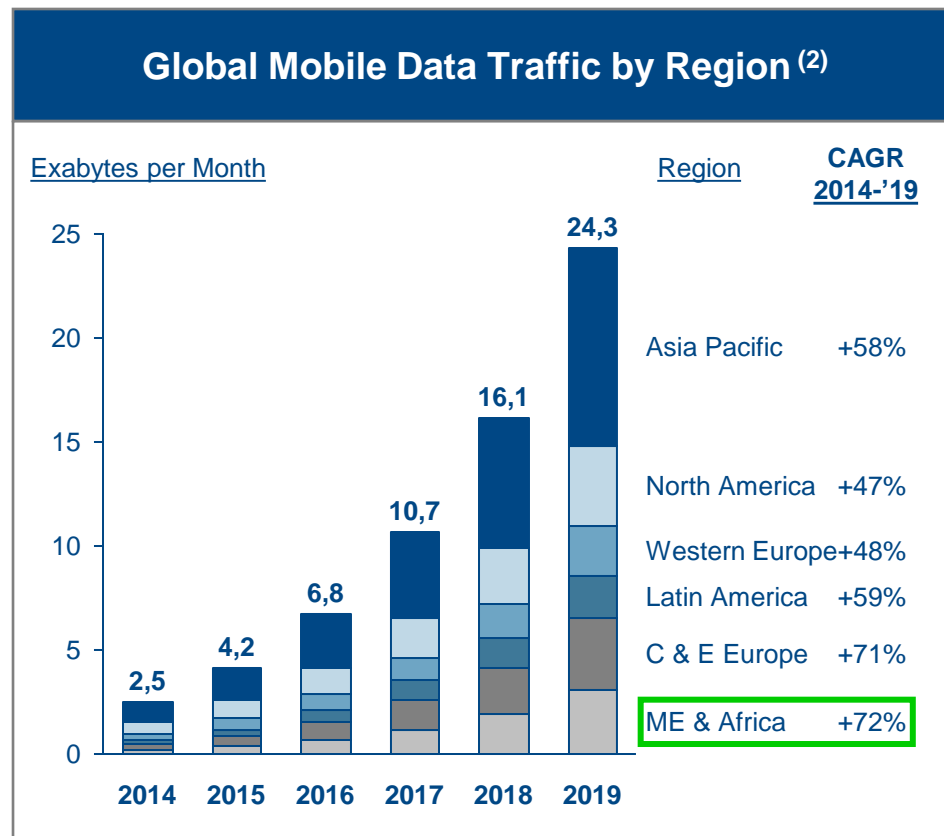
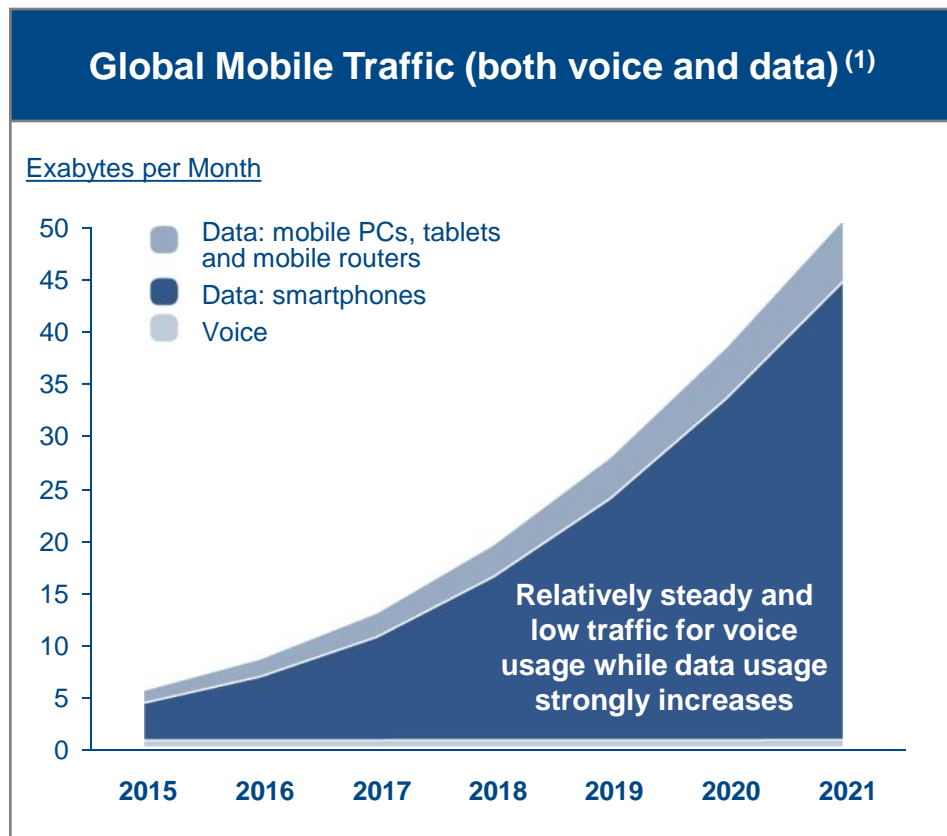


- Mobile Connections are forecasted to reach 9 billion by 2020 (growing at a ~4% CAGR)
- African and Asian regions hold the most Mobile Connections (cumulatively 4.6 billion)

Source: 1) The Mobile Economy 2015 – GSMA (excluding M2M); 2) Ericsson Mobility Report Nov. 2015
 * LATAM= Latin America; APAC = Asia-Pacific excluding China and India

1 Context and Methodology - Global Mobile Traffic

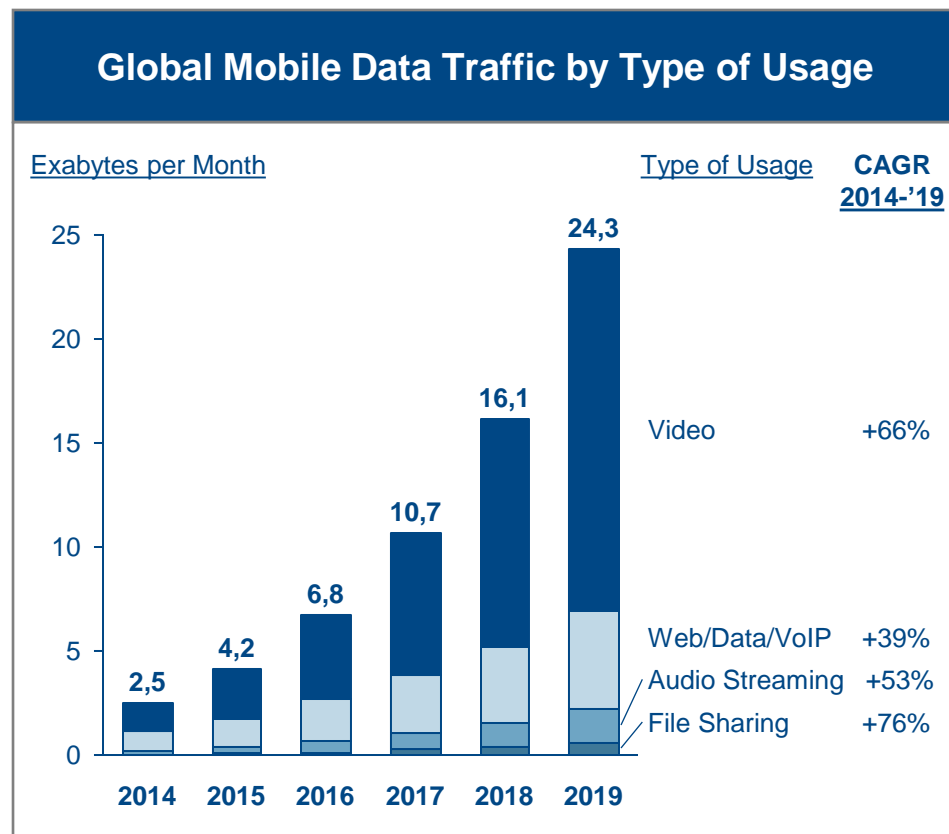
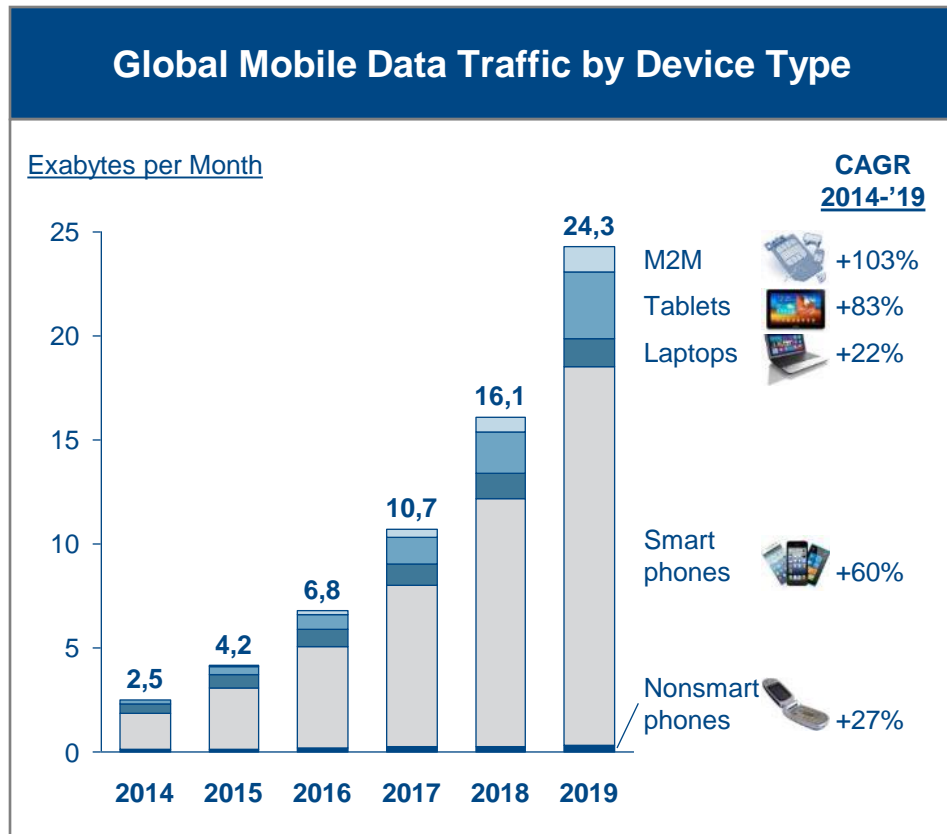
Mobile traffic is booming. It is expected to grow to ~25 EB/mth by 2019 and ~50 EB/mth by 2021 (nearly a tenfold increase since 2015). The highest CAGR is forecasted in Middle East and Africa



■ Global Mobile Traffic, driven by smartphone data, is expected to grow to ~50 EB/month by 2021
■ Traffic should increase with particular intensity in the Middle East and Africa regions (72% CAGR)

Source: 1) Ericsson Mobility Report Dec. 2015; 2) Cisco VNI Mobile, 2015

The sharp increase in Mobile Traffic, is foreseen to be mostly generated by smartphones and to be primarily utilized for video streaming



■ Smartphone generated traffic - 18 EB/mth by 2019 - is expected to drive the tenfold overall increase
■ Video streaming - already accounting for 57% of mobile traffic is forecasted to reach 72% by 2019

Arthur D. Little uses a proven methodology to analyze the tariff landscape in order to benchmark Data and Voice Tariff plans

We executed the benchmark analysis in 3 macro phases

1 Identify relevant Markets and MNOs

- Markets in scope: **17 countries** (US, W. Europe, Middle East)
- Operators in scope: **58 MNOs**

2 Identify comparable Tariff plans

- Comparable tariff plans were selected according to the following criteria:
 - **Data plans** criteria - no dongle included and GB allowances*:
339 tariff plans (out of which 220 Postpaid, 100 Prepaid and 19 both Pre and Postpaid)
 - **Voice + Data plans** criteria - unlimited voice/sms, no device included, GB allowances*:
193 tariff plans (out of which 171 Postpaid, 14 Prepaid and 8 both Pre and Postpaid)

3 Analysis of Tariff plans

- Tariff plans were compared to identify, both for Smartphone and Data selected plans:
 - Analysis of **GB price consistency** among MNOs for each country
 - Analysis of **other** offered **services**
 - Analysis of **3G vs. LTE** offer and **premium price for LTE**

*Scope of the analysis include plans with data allowance > 500 MB per month

Agenda

- 1 Context & Methodology
- 2 Executive Summary**
 - 2.1 Main results per Country per MNO
 - 2.2 Main results per Country per TLC Group
- 3 Tariff Benchmarking per Country

As Data usage is booming, MNOs start competing on offer differentiation rather than on pricing

Main considerations on Offers - ADL Benchmark

■ Decrease in prices is still due to a strong competition mainly based on “commoditized” mobile services (voice or data) or on the customer acquisition strategy of “low cost” players

- In countries where the offering is based on commoditized mobile services (voice or data) prices tend to be decreasing (e.g. Italy, Spain)
- Low cost MNOs (such as, Yoigo in Spain, Free in France, Tele2 in Netherlands) have been shown to drive down the overall market pricing
- Longer commitments vs. discounts practice to retain customers (mostly in EU, while in ME commitment is generally linked to device subsidies)

■ The rapid increase of the availability of smart devices and the OTTs’ offering of new services and application generate new data traffic needs and drive a general increase in data allowance by operators

- Both LTE data and LTE voice + data plans keep showing a generalized increasing trend in average allowance size
- The only countries in which this trend is not evident are Germany, where the wireless market is fairly static after the 4 to 3 consolidation, and Bahrain, where competition and therefore new offering seems to be focused on mid-sized data bundles for home-usage

■ LTE tariffs almost completely replaced the “3G only” and some Operators exploit the traffic explosion introducing new “data-centric” offers and commercial models to improve revenues, retain customers and monetize network investments. Such offers succeed only if paired with reliable LTE network

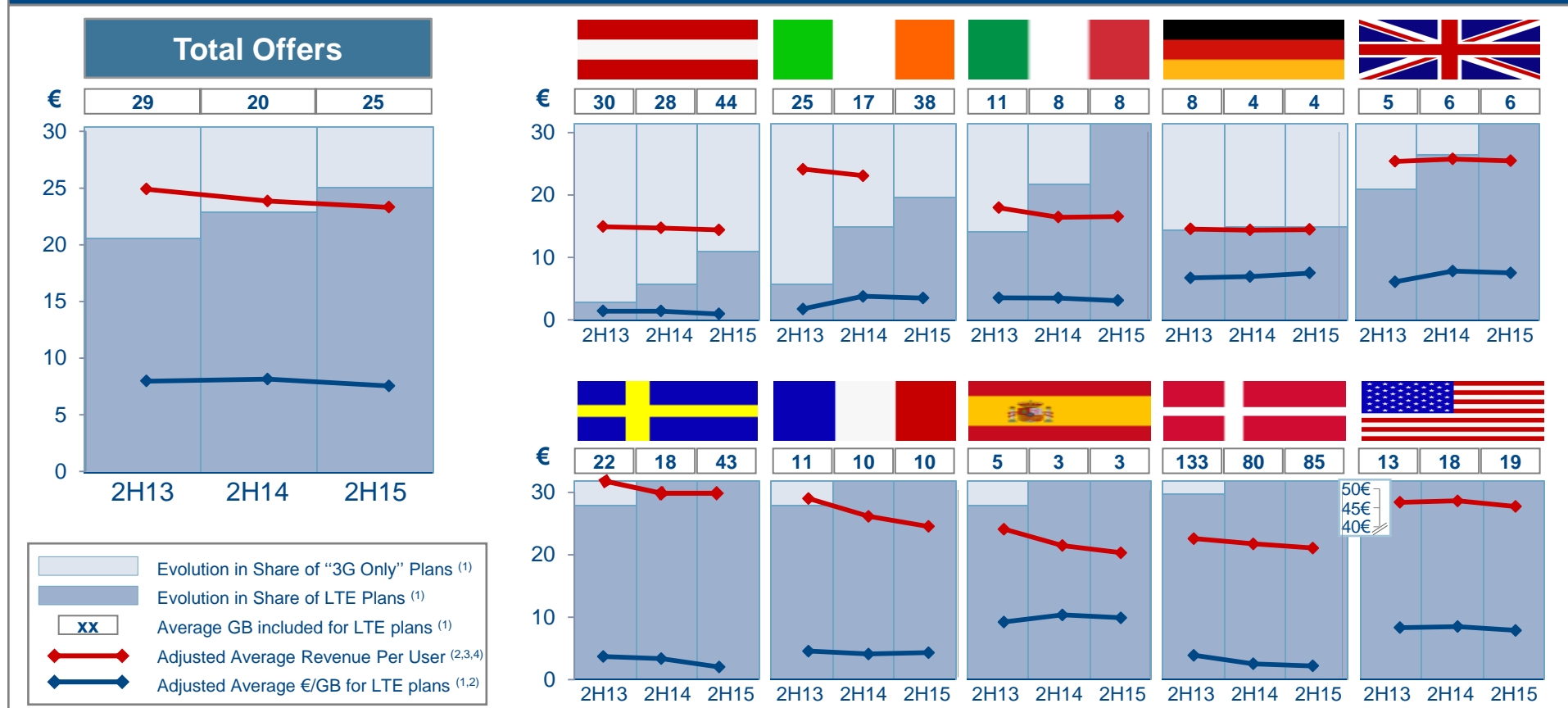
- T-Mobile USA is pursuing a niche positioning through zero-rating on both audio and video streaming, open to every provider without restrictions
- The Vodafone group, extensively includes VAS such as Spotify or Netflix in order to promote a premium network experience (speed & coverage)
- The USA market shows a family oriented approach to mobile services (e.g. share plans), in Europe, instead, the more personal approach, leads some MNOs to focus on multi-device offering for single customers (e.g. Wind Magnum offering 1 extra data-SIM in addition to voice + data plans)

■ Ongoing and expected market consolidation with reduction of the number of MNOs from 4 to 3 would lead to possible change in the tariff trend

- In Ireland, after the 3 and O2 merger, tariff prices have increased in several data allowance segment, mainly on data plans
- In Germany the ongoing merger between O2 and E-Plus reduced the number of MNOs from 4 to 3 and may lead to competitive implications
- Other mergers are expected both in the Italian market (between H3G and Wind) and in the UK market (between 3 UK and O2)

It can be observed how, for Western Europe and USA, the progressive shift from “3G Only” to LTE commercial offers, has not supported a growth of ARPU nor a growth of tariff pricing

Data Tariffs: Evolution in LTE Plans %, ARPU, Adj. Avg. €/GB, Avg. GB, by Country



Sources: 1) Arthur D. Little Analysis; 2) The Economist - Big Mac Index; 3) Merrill Lynch Bank of America Global Wireless Matrix; 4) Comreg (Ireland ARPU - data on 2015 expected not available)
 Notes: countries depicted are the ones included since the first edition of the study (Bahrain, Oman, KSA, Kuwait, Netherlands, Oman, Qatar and UAE not depicted)

Overview of Analyzed Markets, by Region (1/3)

Main considerations on Offers - ADL Benchmark - Western Europe

- LTE tariffs almost completely replaced the “3G only” equivalents. Significant decrease in prices in parallel with an increase in data allowance by operators (mainly for “data only”)
- Tele2 entered the LTE market with a no frills, aggressive pricing strategy. While KPN, T-Mobile and Vodafone are the incumbents.
- KPN provides the most attractive **Value Added Services** (Entertainment, Spotify, WiFi hotspots, etc.). Tele2 includes very limited value added services within its offer

- No “3G only” tariffs available on “data only” and very few “voice+data”
- Little price differentiation between operators across both the “voice + data” and “data only” markets
- **Value added services differentiation:** O2 and Vodafone in particular are the most attractive (O2 priority moments application, Vodafone entertainment offerings)

- The acquisition of O2 Ireland by 3 significantly increasing 3’s market share
- Tariff prices have marginally increased in the “data only” market, while pricing per GB increased for unlimited voice + data plans. 3G tariffs remain widespread in the “data only” market
- Differentiation between operators is mostly evident for tariffs that include low data bundles

- Prices have stabilized with an increase of data allowance. ARPU increase due to consumers exceeding their data package
- Established MNOs compete through main brands, but also through low cost second brands - Sosh for Orange, Red for SFR, B&You for Bouygues - while Free focuses on a unique value-for-money plan including unlimited voice and 50GB of 4G data (but only 3GB on 3G)
- **Value added services** are widely included: music, TV, cloud storage, international roaming, Wifi hotspot, etc.

- Generalized increase in the size of data allowances, paired with an increase in prices, with the exception of Yoigo that presents an aggressive low-price strategy
- Vodafone offering (premium player) covers all user profiles, from light to heavy users
- In stand-alone mobile price plans, all competitors, except Yoigo, have started to use **value added services** (cloud, content) as differentiator; roaming starts to be a factor in high-end price plans

- Converging pricing and data allowances for most contracts
- Strong demand for data usage by customers - both at home and on-the-move
- **Value added services:** Telia offers entertainment services (HBO, Storytel, Spotify), Telenor productivity services (cloud storage, Office 365), TDC leisure services (TV-streaming), 3 offers Netflix with its larger data bundles

- Decrease in plans or significant increase in data allowance for the same price
- Market leaders’ strategies: Tele2 (price leader) has further lowered prices, Telia (mid-to-high prices) has doubled data allowances. The two smaller players (Three and Telenor) have reliable LTE network, and apply mid-to-high tariffs
- **Value added services:** Telia offers Spotify subscriptions with contracts, Tele2 offers Viaplay, 3 offers free data for music streaming

- Reduced number of MNOs from 4 to 3 (O2 merged with E-Plus) may lead to competitive implications
- The offer of “Data only” tariffs remained fairly static, whereas with respect to “unlimited voice + data” plans, most operators increased data allowances or slightly decreased prices
- **Value added services:** Vodafone & E-Plus offer Music & Cloud; O2 integrated landline service and additional sim card(s) for free, whereas T-Mobile includes (in some plans) VoIP and a Hotspot-Flat

- Premium strategy for A1, competitive strategy for T-Mobile and 3 Austria. Three with low prices
- **Value added services:** A1: cloud and additional sim card for free; T-Mobile: new device every year at cost of EUR 4,99 per month; Three: unused data can be taken into the following months and roaming units include whole Europe (instead of EU)

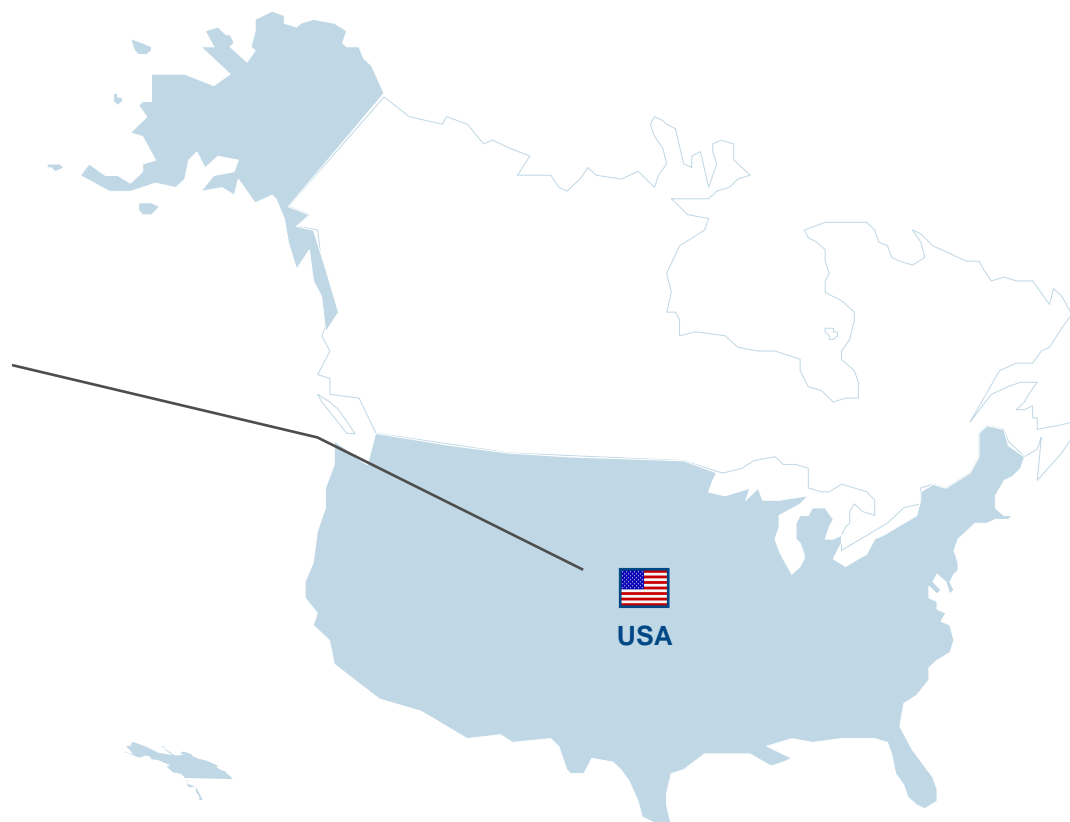
- All plans offer 4G connectivity, in addition to 3G, at no extra fee with generalized decrease in price per GB, paired with an increase in the size of data allowances.
- TIM and Vodafone are positioned as the prime players, with premium priced tariffs running on reliable networks, and generally including **Value Added Services** such as media on demand, music, gaming and news.
- Wind and Three hold a no frills value-for-price positioning. The 2 operators announced an agreement to form a joint venture of their telecoms businesses, which would reduce the number of MNOs from 4 to 3 and lead to possible competitive implications.



Overview of Analyzed Markets, by Region (2/3)

Main considerations on Offers - ADL Benchmark – USA

- Clear positioning by all MNOs in “unlimited voice+data” tariffs - with At&t and Verizon offering premium pricing and focusing on family share plans - while T-Mobile and Sprint compete through a value-for-money proposition including plans with unlimited data
- Fairly homogenous positioning for most MNOs in “data only” tariffs, with the exception of T-Mobile’s new aggressive and innovative strategy (doubled data bundles and launched zero-rating video streaming on major content providers)
- Remarkable overall advancement in **Value Added Services**, with MNOs integrating their offers with: cloud storage, proprietary hotspots, Wifi calling and international connectivity (data, voice and SMS) but also several entertainment and music related services



Overview of Analyzed Markets, by Region (3/3)

Main considerations on Offers - ADL Benchmark – Middle East

- Market rapidly moving towards high-value wireless and wireline data services, supported by the launch of LTE
- Low level of strategy differentiation between the players – not in terms of offer nor in terms of pricing
- Large broadband allowances offered as share plans for both home and “on the go” use
- Limited differentiation based on 3G / LTE

- Dynamic tariff landscape
- Pricing is comparatively very high with respect to other countries
- Simple offer strategy (Ooredoo) vs diversified offer strategy (Vodafone - entertainment products included in offers)
- VIP services and priority customer service provided by both Ooredoo and Vodafone

- In spite of being an example of 3 MNOs Middle Eastern market, the higher level of competition is not shown to have a strong diminishing effect on pricing, which is similarly high as in other Middle Eastern markets with 2 players
- Widely differentiated market for “data only” tariffs, with small allowances, often prepaid, available for on-the-go use and larger allowances available for at-home use
- Very high voice+data tariffs with respect to other markets, highly voice driven, with all MNOs demanding a significant price premium for unlimited local minutes, and relatively low premiums for large data allowances

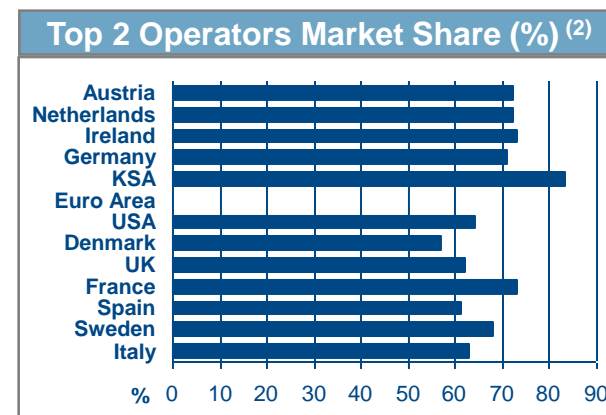
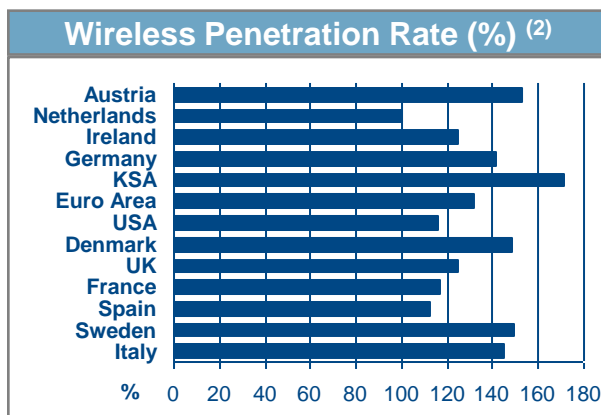
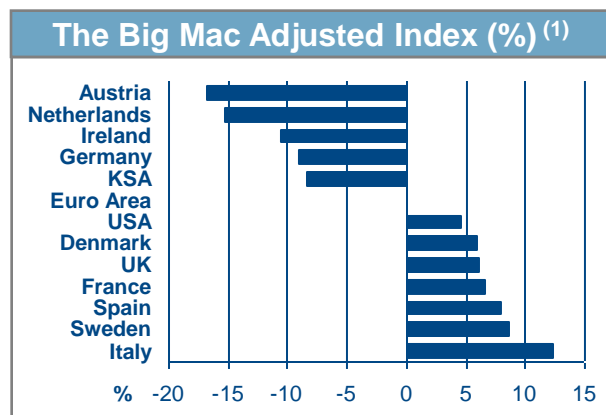
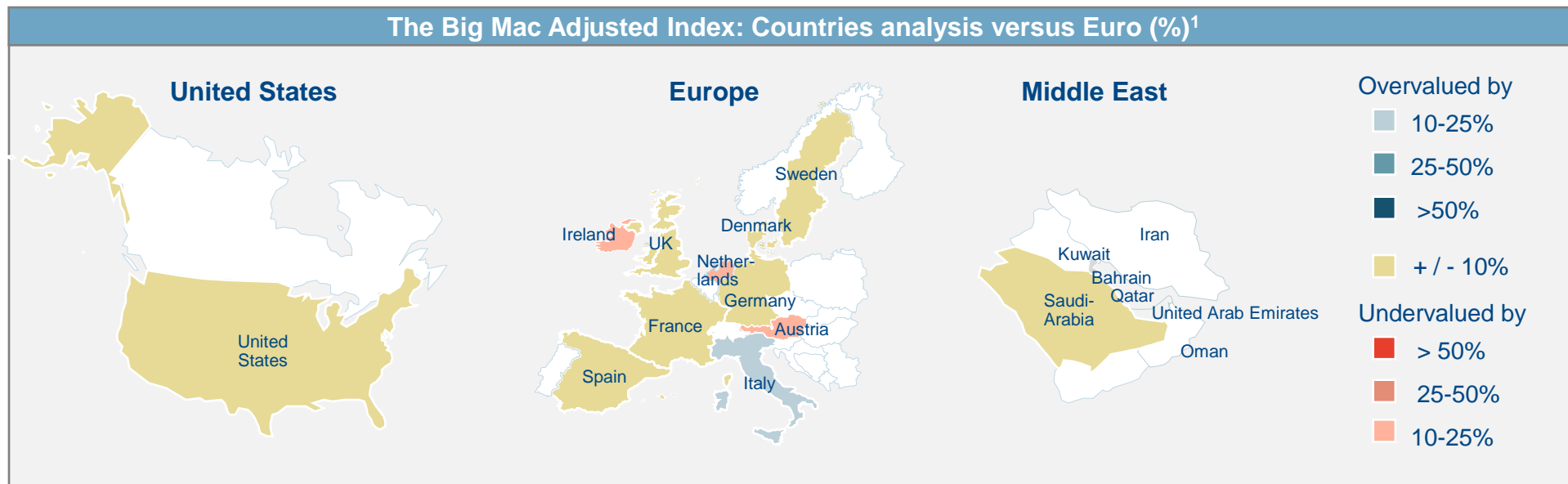


- No full-fledged competition results in operators' plans mostly matching in terms of pricing and data allowances
- Decreasing pricing trend despite tariffs remaining high
- LTE currently advertised only with data plans (du: only highest capacity data plan). No 3G vs LTE differentiation (Etisalat)
- Shared data packages available (monetization is through monthly charges for extra SIMs)
- Prices may decrease due to MNP made available in 2014, with both operators stepping up their marketing activities

- Wide offering from the 3 service providers in terms of data allowances
- MNOs competition resulting in pricing standing at the low end of the GCC region
- Competition is expected to increase after the launch of 3 MVNOs
- Future pricing is expected to be driven by new network and VAS services (e.g. Zain capitalizing on LTE, unlimited Youtube, etc.)

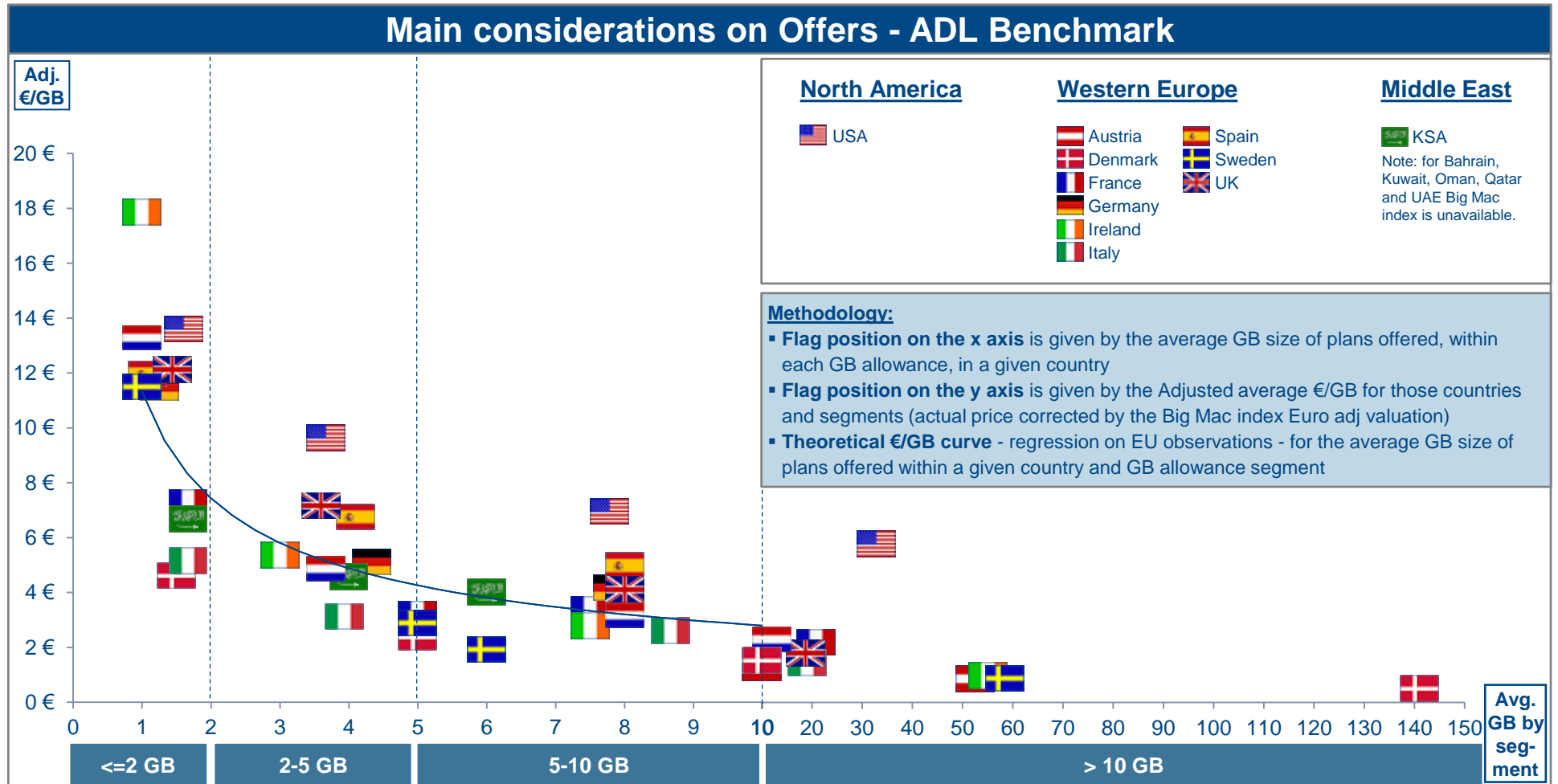
- Low level of competition due to the presence of only 2 operators in the market
- Highly static tariff landscape with no significant differentiation between operators or across semesters
- Future pricing and differentiation are expected to be driven by advanced network services and VAS

Wireless penetration rates and top 2 MNOs' market concentrations are similar for analyzed countries, the Big Mac Adjusted indicator, however, varies largely among different markets



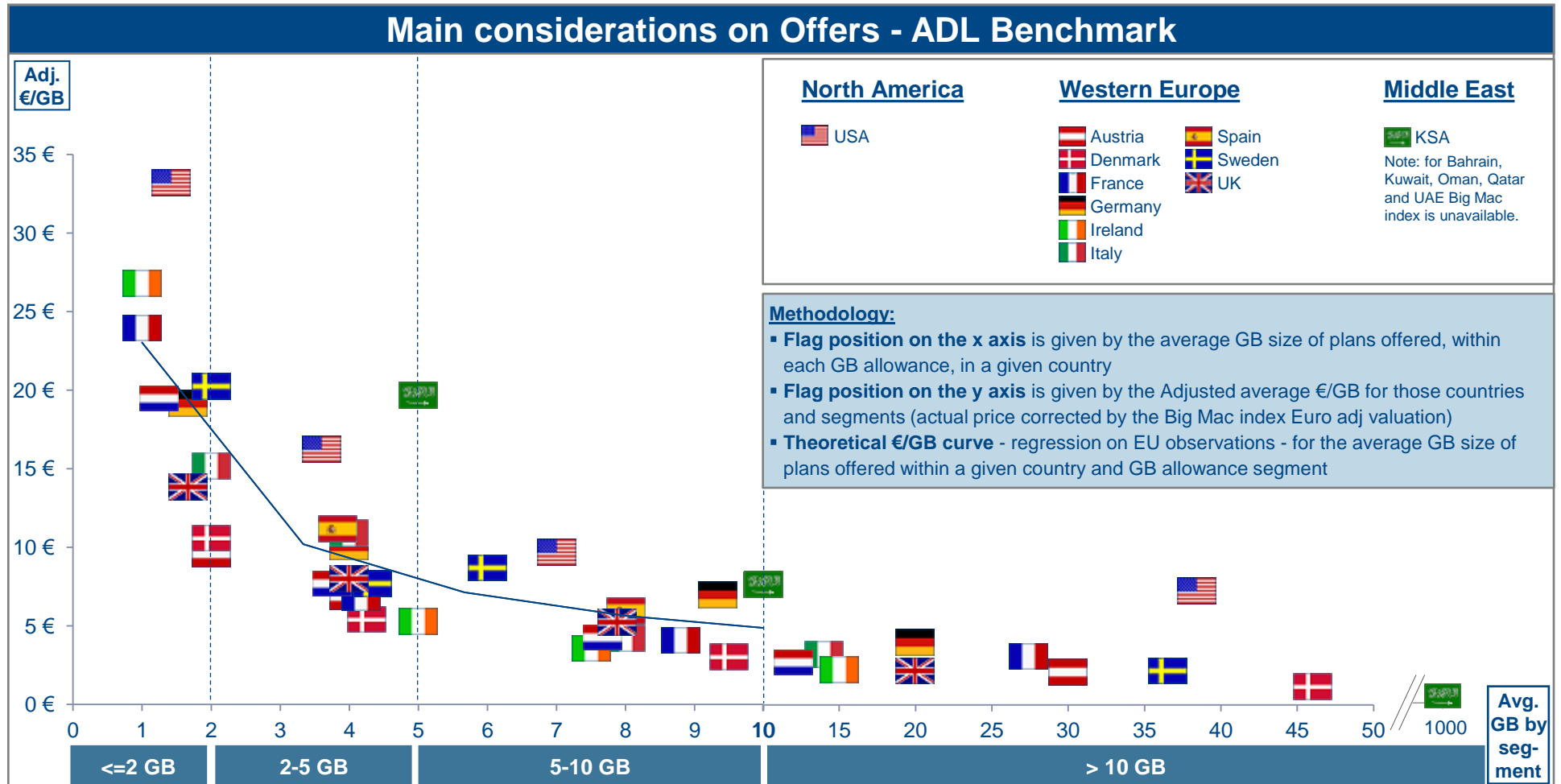
Source: 1) The Economist (Selected Base Currency: EUR - July 2015); 2) Merrill Lynch Bank of America Global Wireless Matrix 2Q15, Arthur D. Little Analysis

DATA: average GB bundle size and average adjusted price/GB for LTE tariffs, by country and GB allowance segment



Source: Arthur D. Little Analysis

VOICE + DATA: average GB bundle size and average adjusted price/GB for LTE tariffs, by country and GB allowance segment



Source: Arthur D. Little Analysis

Percentage evolution in country average price per GB for LTE plans, keeps showing a generalized price reduction trend for both data and voice + data plans

LTE plans average price/GB evolution 2H14 - 2H15

DATA	<= 2 GB		-42.8%	4.9%	-5.3%	82.0%	-15.4%	-2.6%	17.9%	-12.0%	-20.6%				0.0%	0.0%	-22.0%
	2-5 GB		-18.9%	0.0%	8.6%		-15.5%	-17.6%	-34.8%	4.8%	3.2%	-10.1%	4.2%	-15.9%	0.0%	0.0%	-10.1%
	5-10 GB		-6.5%	-10.9%	-2.9%	19.2%	2.1%	0.0%	-42.1%	8.8%	-3.3%	-21.2%	0.0%	-14.3%	0.0%	0.0%	-20.1%
	> 10 GB	-38.7%	-14.4%	26.2%		-11.4%	-2.7%		-46.7%	-1.0%	-4.4%	-9.6%		-31.2%	-11.4%	-10.4%	
VOICE + DATA	<= 2 GB		-28.5%	50.0%	-20.9%	24.1%	-18.6%		0.9%	-28.0%	-17.4%						
	2-5 GB	-25.0%	-19.1%	-9.8%	-22.3%		-14.2%	-2.3%	-25.7%	2.7%	-22.0%				-5.8%		0.0%
	5-10 GB	-7.1%	-14.9%	-29.9%	-4.9%	0.0%	5.0%	-34.0%	14.8%	-9.9%	-14.8%		-12.6%				0.0%
	> 10 GB		-32.2%	-37.2%	-2.8%	-4.8%			-38.4%		12.6%		0.0%				

Out of the 78 cases of GB allowance segments that underwent changes in price per GB, 77% (i.e. 60) experienced price reductions, while only 23% (i.e. 18) experienced price increases

Legend:

- Cells are filled in white when no data was available or no changes were found between 2H 2014 and 2H 2015
- Cells are highlighted in red when average price/GB ratio decreased between 2H 2014 and 2H 2015
- Cells are highlighted in green when average price/GB ratio increased between 2H 2014 and 2H 2015

Both LTE data and LTE voice + data plans keep showing a generalized increasing trend in average allowance size, paired with a decreasing trend in average price per GB

LTE plans average GB size and average price/GB evolution 2H14 - 2H15

DATA	Avg. GB bundle	55%	7%	5%	-5%	130%	2%	8%	133%	7%	8%	-4%	8%	152%	34%	43%	15%
	Avg. €/GB ratio	-33%	-16%	5%	8%	-9%	-13%	-5%	-40%	-4%	-7%	-20%	-12%	-58%	-5%	-6%	-20%
VOICE + DATA	Avg. GB bundle	53%	33%	49%	13%	17%	71%	50%	99%	44%	-13%		-19%	118%	33%	43%	41%
	Avg. €/GB ratio	-17%	-35%	-2%	-21%	-38%	-35%	-37%	-42%	-31%	-22%		-8%	-24%	-36%	-23%	-31%

Between 2H14 and 2H15, average GB bundles increased for 14 out of 16 data markets and 13 out of 15 voice+data markets, price per GB decreased for most data markets and for every voice + data market

Legend:

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After completion of the March 2015 merger between 3 Ireland and O2, with Ireland becoming a 3 players market, we observed increases in €/GB pricing in the <=2GB allowance segments

LTE plans average GB size and average price/GB evolution 2H14 - 2H15

	DATA			VOICE + DATA		
	Avg. GB	Avg. €/GB	Main Drivers	Avg. GB	Avg. €/GB	Main Drivers
<= 2 GB	-33%	82%	<ul style="list-style-type: none"> Introduction of a new 1GB LTE plan by 3 Ireland - higher priced than its 3G equivalent 	-25%	24%	<ul style="list-style-type: none"> Meteor dismissed its 1GB plan and Vodafone enlarged its 2GB plan, leaving only higher priced tariffs in the entry level segment
2-5 GB	N/A	N/A	<ul style="list-style-type: none"> No changes as 2-5 GB plans were only offered in 2015 	N/A	N/A	<ul style="list-style-type: none"> No changes as 2-5 GB plans were only offered in 2015
5-10 GB	7%	19%	<ul style="list-style-type: none"> Dismissal by Meteor (#3 MNO) of its 6GB plan, in favour of pricier plans in the segment 	0%	0%	<ul style="list-style-type: none"> No changes as only one 7.5GB plan by Meteor keeps is included in the segment
> 10 GB	106%	-11%	<ul style="list-style-type: none"> Introduction of two exceptionally large plans (100 and 250GB) by 3 Ireland in this otherwise stable segment in terms of pricing 	0%	-5%	<ul style="list-style-type: none"> Slight price decrease by Meteor (#3 MNO) on its top tariff

Legend:

- Cells are filled in white when no data was available or no changes were found between 2H 2014 and 2H 2015
- Cells are highlighted in red when average ratio decreased between 2H 2014 and 2H 2015
- Cells are highlighted in green when average ratio increased between 2H 2014 and 2H 2015

Agenda

1 Context & Methodology

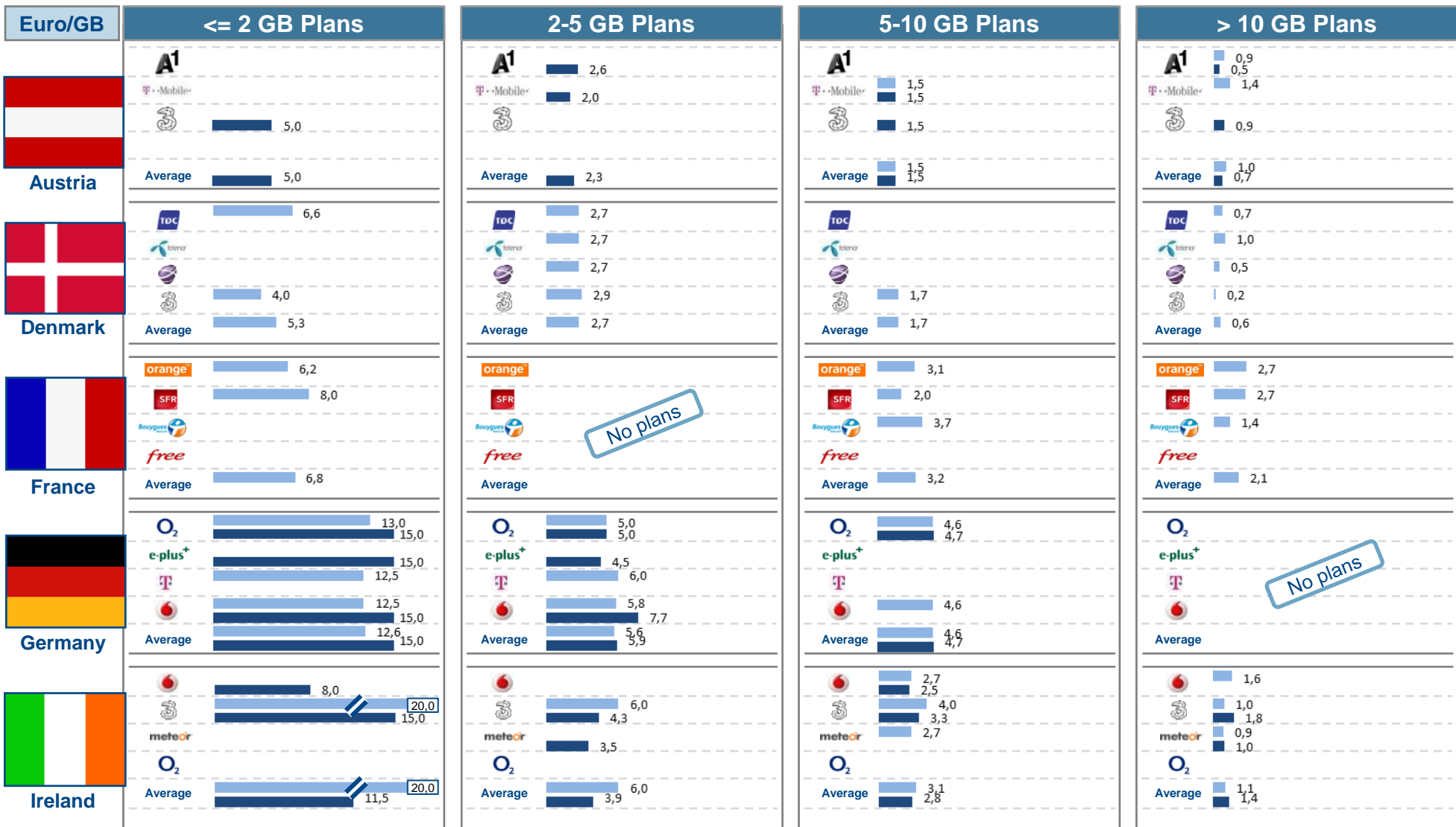
2 Executive Summary

2.1 Main results per Country per MNO

2.2 Main results per Country per TLC Group

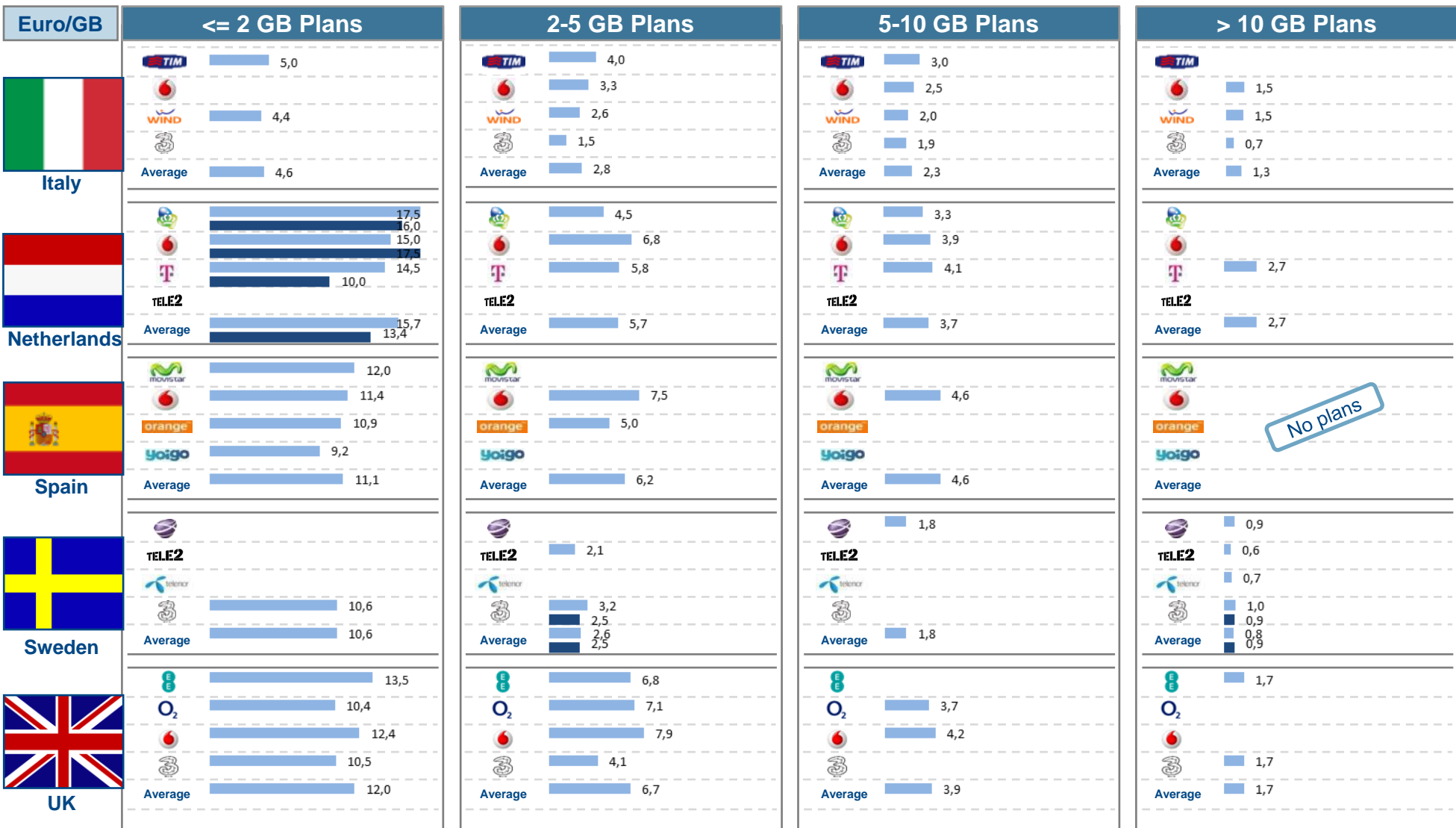
3 Tariff Benchmarking per Country

Average GB Price per country and operator: Data Plans (1/4)

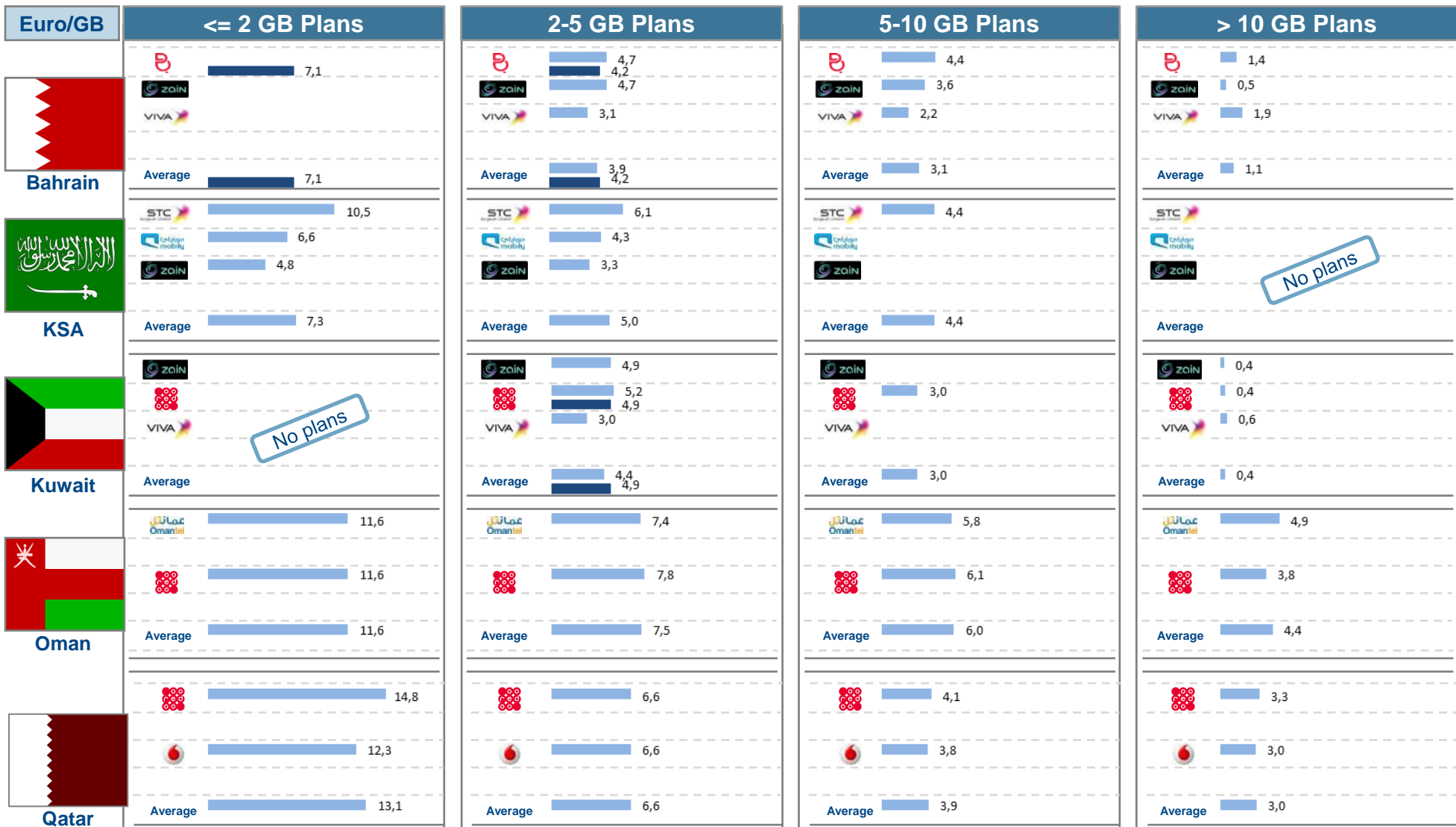


Average GB Price per country and operator: Data Plans (2/4)

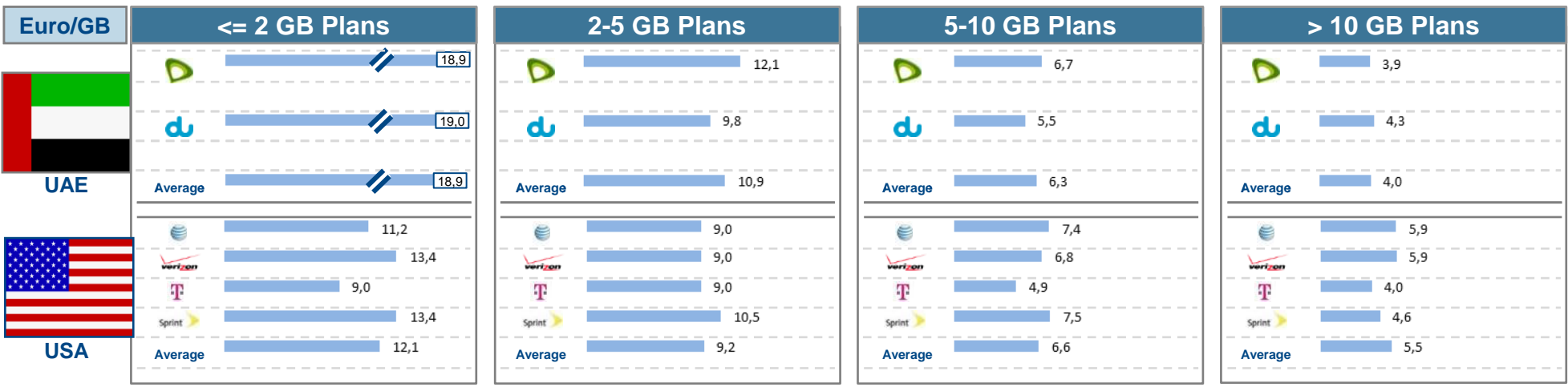
LTE
 3G



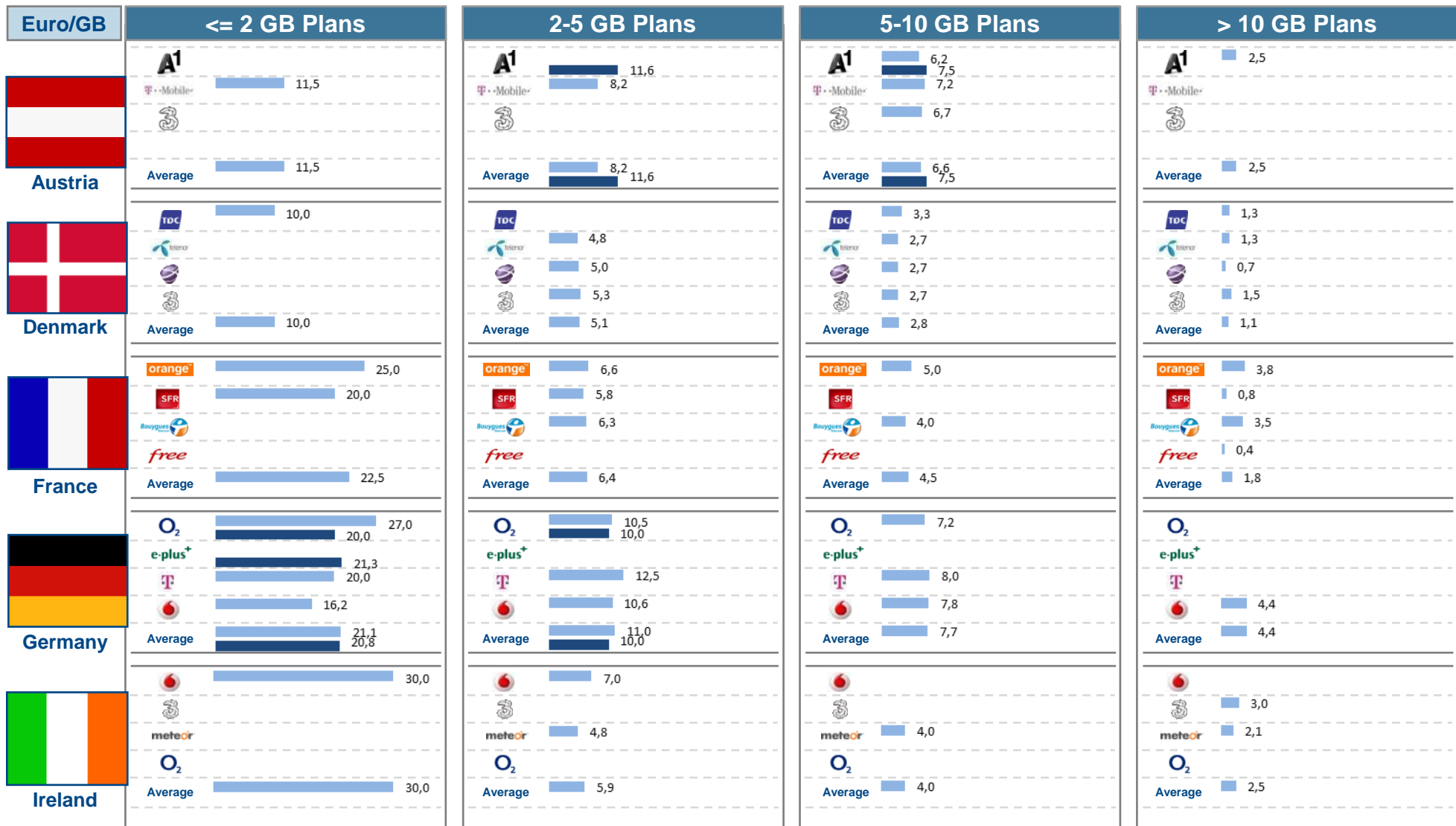
Average GB Price per country and operator: Data Plans (3/4)



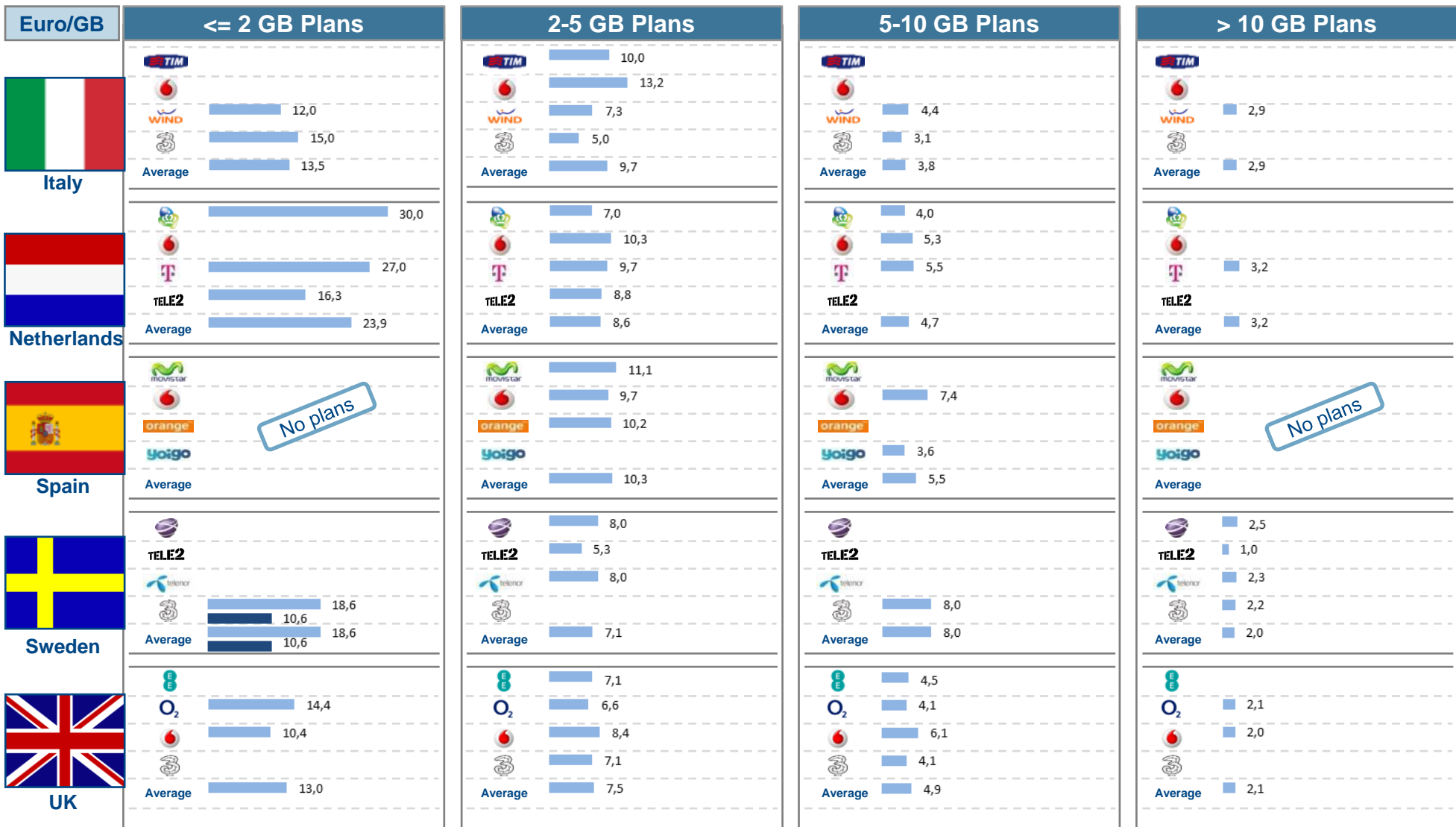
Average GB Price per country and operator: Data Plans (4/4)



Average GB Price per country and operator: Voice + Data Plans (1/4)



Average GB Price per country and operator: Voice + Data Plans (2/4)

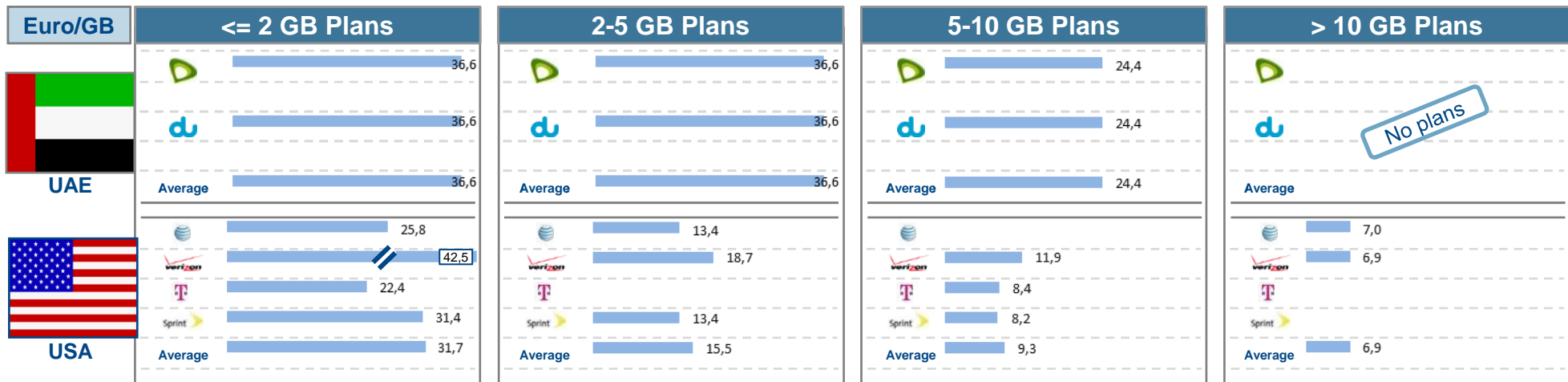


Average GB Price per country and operator: Voice + Data Plans (3/4)



Average GB Price per country and operator: Voice + Data Plans (4/4)

LTE
 3G



Agenda

1 Context & Methodology

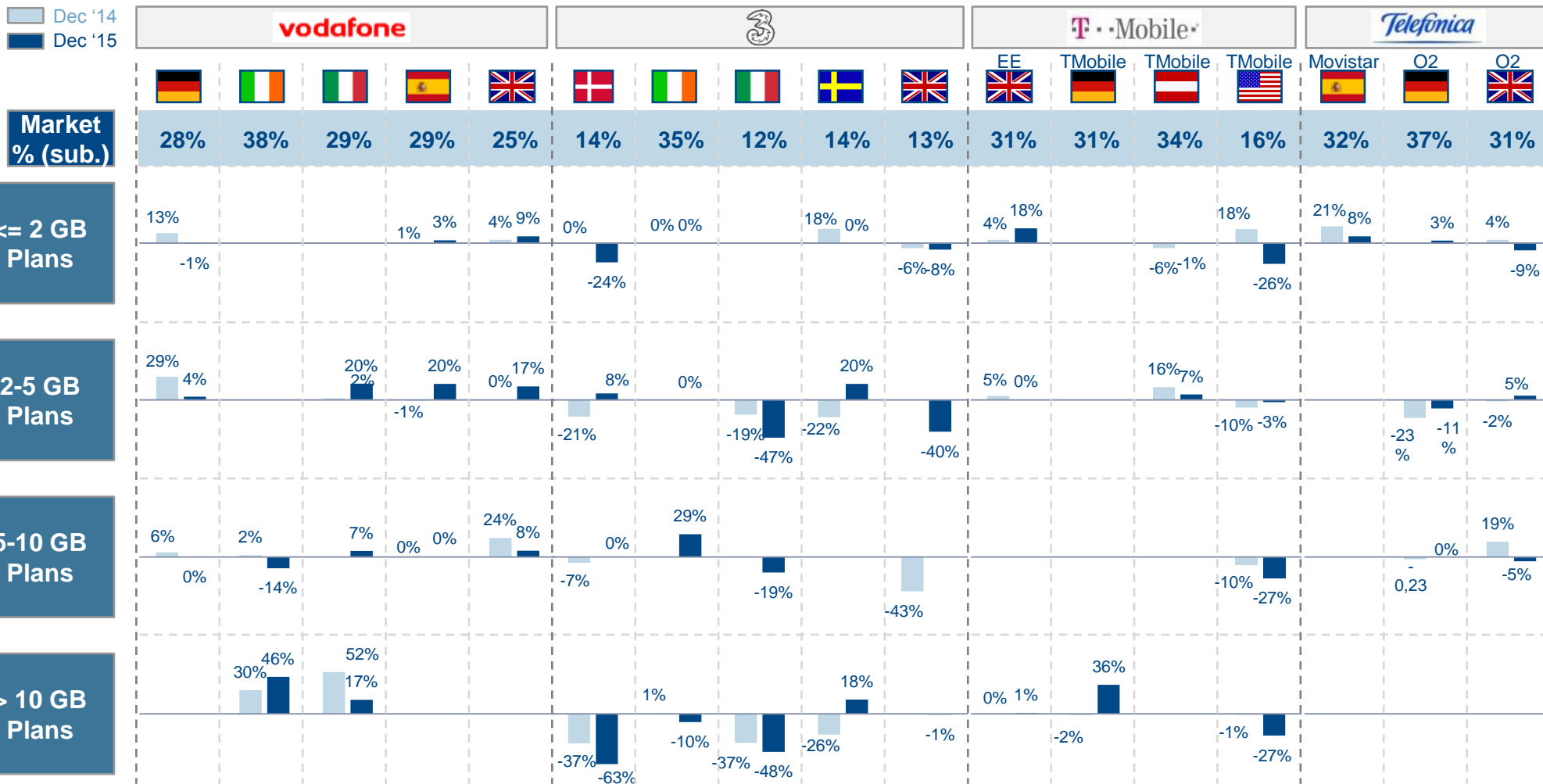
2 Executive Summary

2.1 Main results per Country per MNO

2.2 Main results per Country per TLC Group

3 Tariff Benchmarking per Country

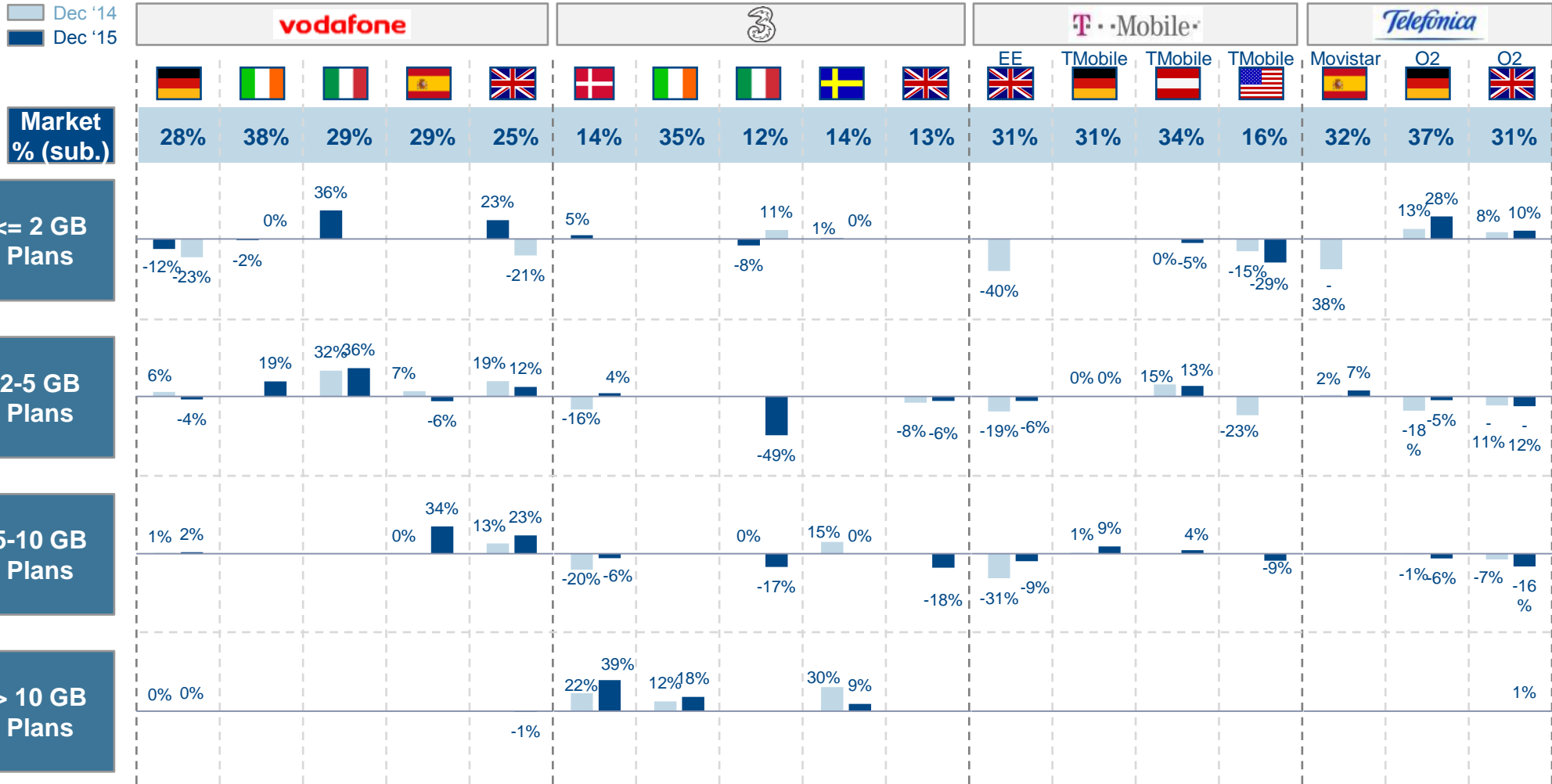
LTE BENCHMARK: Data plans pricing strategies (Price per GB vs country average)



Vodafone keeps a premium positioning across most market segments, while Three operates quite consistently as a price leader

Note: the y axis depicts the % difference of operator's vs. market's average Price/GB this is by country and by GB allowance segment (<=2GB / 2-5GB / 5-10GB / >10GB)

LTE BENCHMARK: Voice + Data plans pricing strategies (Price per GB vs country average)



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Agenda

- 1 Context & Methodology
- 2 Executive Summary
- 3 Tariff Benchmarking per Country**

Understanding Country's graphs analysis details

Key

Plans distribution by Price and GB included

Plan Price (€) vs GB

Legend: Denmark, Telenor, TDC, LTE @ 3G, Postpaid, Prepaid, Old offer, New offer

Denmark Market: Characterized by two different kinds of offers: Single-mobile bundles for "on the go use" and very large bundles for "home use".

Telenor: Have lowered prices and moved closer to competitors.

TDC: Allowances have increased while prices remained steady.

Telia: Offers offering the largest bundle (500GB) at only a single higher price than competitor's 250GB plans.

TDC: Consistently positioned as the market price leader.

$R^2 = 0.922$

$R^2 = 0.935$

Price/GB at market level (with base 14):

$R^2 = 0.982$

$R^2 = 0.9807$

Strategy outline:

- Competitive Price Strategy:** 6 month retention 2M Only offers shown (30 days contract). Data allowance increased while pricing has not changed. Value added services by offering cloud storage, eBooks and music streaming.
- Premium Price Strategy:** 6 month retention 2M Only offers shown (30 days contract). Price pricing has decreased while data allowance remain steady. Offer family packages which reduce price and offer more Office 365 including OneDrive.
- Competitive Price Strategy:** 12 month retention 2M Only offers shown (30 days contract). 50GB increased data allowance to 35GB. Only provider to offer 50GB contract without minimum retention time. Value added services by offering Spotify, HBO, Netflix and Hulu TV.
- Value for Price Strategy:** 12 month retention 2M Only offers shown (30 days contract). Offer relatively large data allowance at alternative pricing. Have either increased data allowance or reduced prices to several contracts under 14.
- Value added services by offering health.**

Analyzed Plans:

0 GB, 2-5 GB, 10 GB, <=2 GB, 5

Price/GB at market level (with base 14):

Operator	2013	2014	2015
Telia	40	35	30
TDC	40	35	30
Telenor	40	35	30
Average	40	35	30

The following slides show competitors positioning in terms of data allowance, tariff price and price per GB

Key:

- Actual LTE Tariff
- Actual 3G Tariff
- 2H15 Tariffs no longer on the market
- Tariff shifts
- Call Out
- Additional Information

Adjusted Big Mac Index (Eur) 20%

Top 2 MNOs market share 65%

Mobile penetration 150%

In both «Plans distribution by Price and GB included» and «Plans distribution by Price per GB and GB included» scatterplots there are two trend lines (of current and 2H14 analysis):

- both regressions curves are exponential in order to ensure better data interpolation
- for each curve, R-squared is indicated.

Unlimited data allowance plans have not been included in GB price averages.

All prices are expressed in euro (x-rates reported in the last slide). Historical currency values (1H14 and 2H14 editions) are normalized with respect to current exchange rates used in this edition.

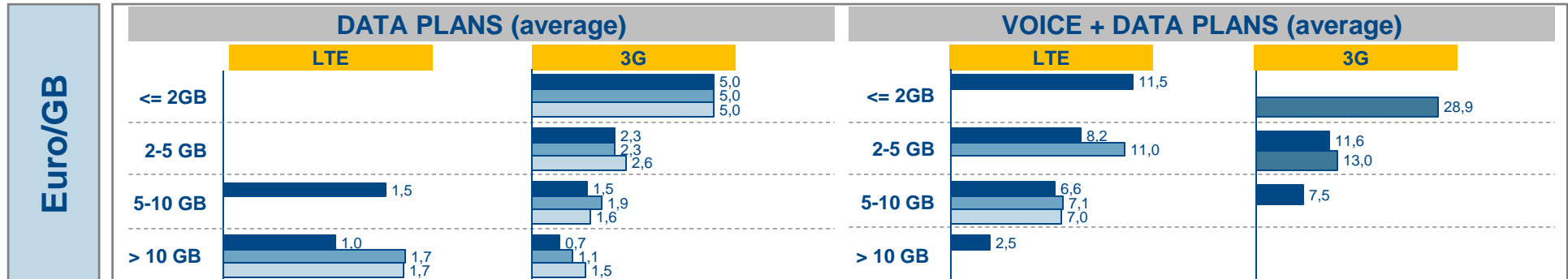
Agenda

- 1 Context & Methodology
- 2 Executive Summary
- 3 Tariff Benchmarking per Country**
 - 3.1 Western Europe**
 - 3.2 North America
 - 3.3 Middle East

COUNTRY SUMMARY: main indicators of the country



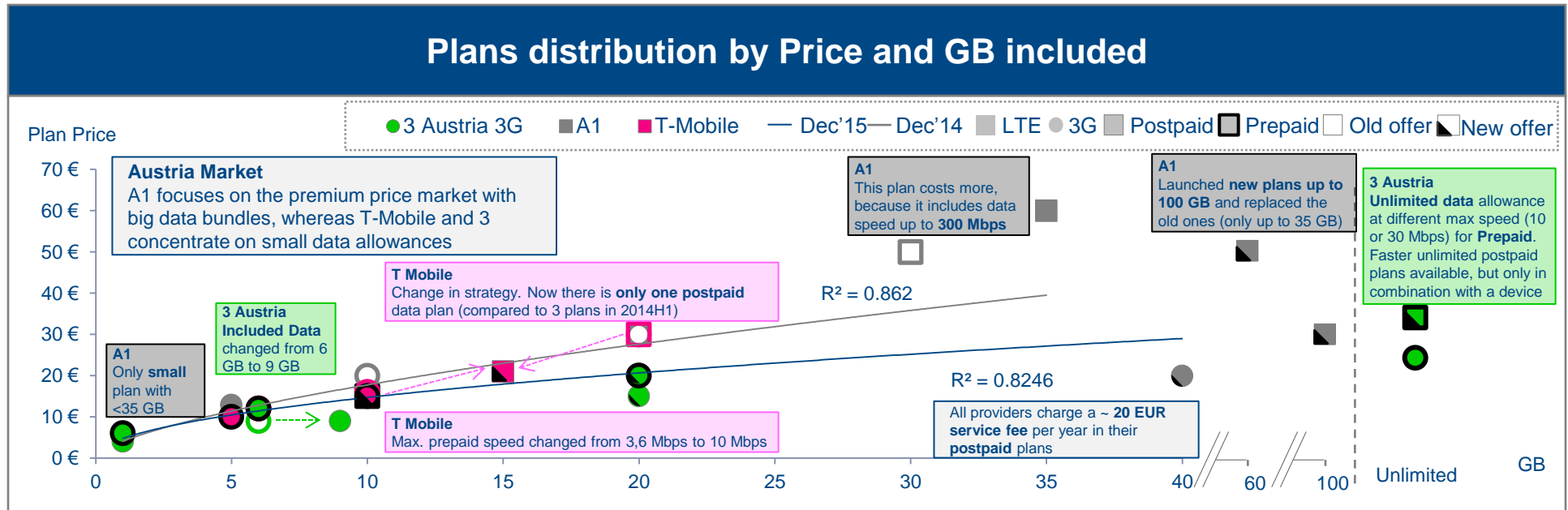
- Market penetration of mobile broadband reached 67% as of December 2014 (EU average: 72%), while Austria's LTE broadband coverage, since 2013, increased from 35% to 60% (EU December 2014: 79%)
- Premium strategy for A1, competitive strategy for T-Mobile and 3 Austria. Three is being very innovative (e.g. possibility to take unused Data into the following months) with low prices
- Different strategies on value added services: A1: cloud and additional sim card for free; T-Mobile: includes roaming service within its voice + data plans; Three: unused data can be used in the following months and roaming units include the whole Europe (instead of EU)



Source: Merrill Lynch Global Wireless Matrix, Arthur D. Little Analysis

■ 2H15 ■ 2H14 ■ 2H13

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



42% '14 41% '15

Premium price market leader. Provides the fastest max. high-speed, but less data than the competitors

- Tiered **max. speed** up to **300 Mbps**
- Offers **new plans up to 100 GB**, but no **unlimited high-speed data**
- Some plans include **Internet Security**
- Offers no **Prepaid** plans
- Additional fee for **upgrade** to up to **300 Mbps**



31% '14 30% '15

Competitive offers below market leader

- Tiered **max. speed** up to **150 Mbps**
- **Prepaid** plans with new max. speed (10 Mbps)
- Also Offers plans with **unlimited data** and only **differentiate by the speed** of down- and upload. But these plans only in combination with a device

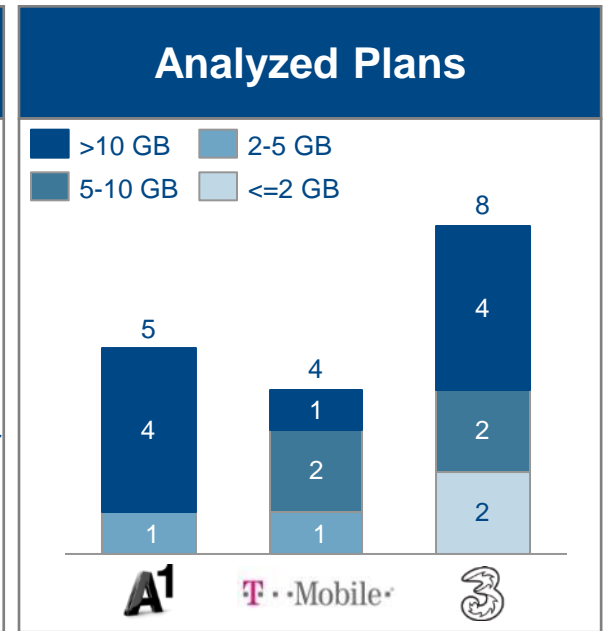
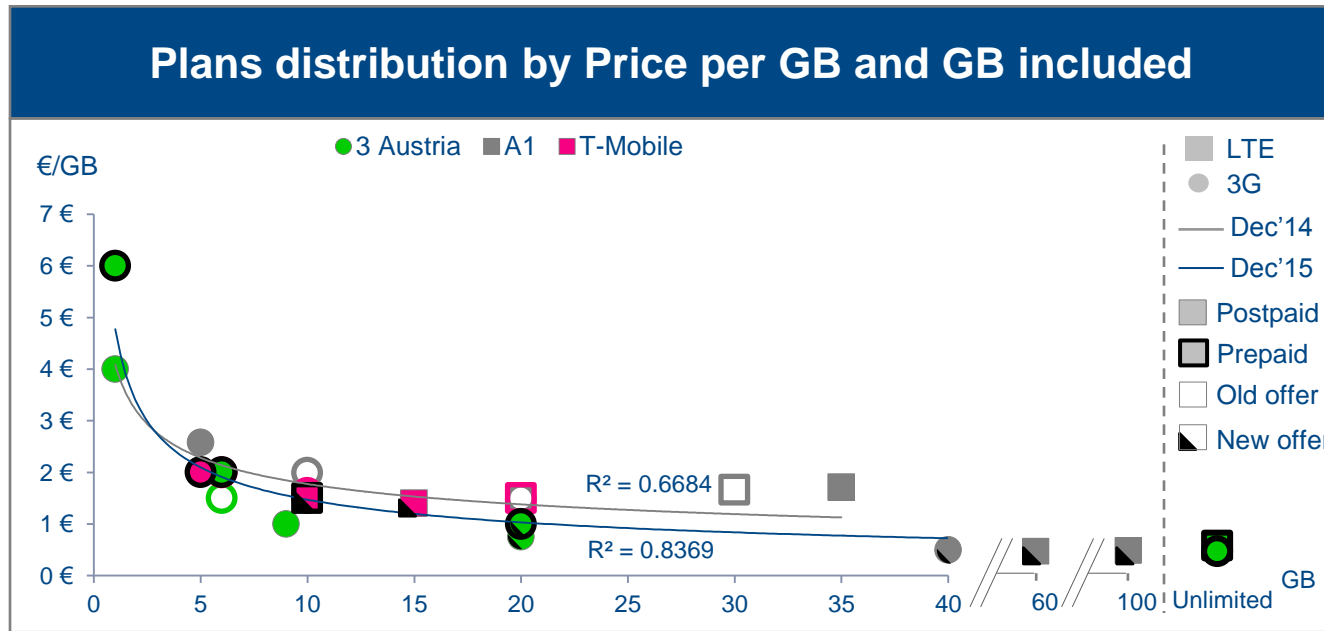


27% '14 28% '15

Competitive offers (cheap prices and innovative offers)

- **3G** in the **low-medium allowance** (1 or 9 GB)
- **Unlimited bundles** with **4G** except of one **discount offer** with only **3G**
- **Unlimited plans** in combination with a device and therefore 24 months retention, but also as **prepaid plan** (slightly more expensive and less data speed)
- Tiered **max. speed** up to **150 Mbps**
- **Includes 3Mobile TV** station (6 Channels)

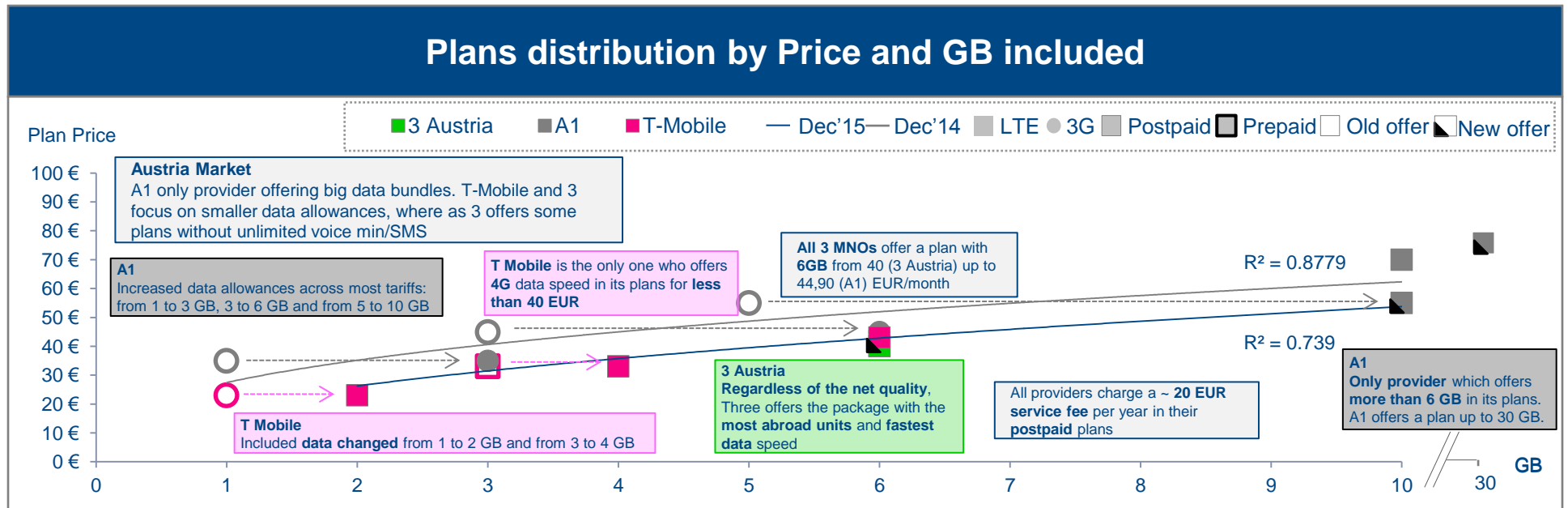
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
A1	4G				4G				4G				4G	1.7	1.7	0.9
	3G				3G	2.6	2.6	2.6	3G	2.0	2.0		3G	1.5	1.5	0.5
T-Mobile	4G				4G				4G			1.5	4G		1.6	1.4
	3G	5.0			3G		2.0	2.0	3G	1.0	2.0	1.5	3G			
3	4G				4G				4G				4G			
	3G	5.0	5.0	5.0	3G				3G	1.8	1.8	1.5	3G		0.8	0.9
Average	4G				4G				4G			1.5	4G	1.7	1.7	1.0
	3G	5.0	5.0	5.0	3G	2.6	2.3	2.3	3G	1.6	1.9	1.5	3G	1.5	1.1	0.7

Sample: T-Mobile, 3 Austria, A1

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

42% '14 **41%** '15

Premium price strategy based on incremental data offers mostly including 4G:

- Lower prices for landline services customers
- Tiered max. speed up to 300 Mbps
- 5/50/100GB Dropbox storage according to plan
- Also up to 2 extra sim cards (for data usage at another device) included according to plan
- Up to 300 voice minutes/SMS/MB to and within EU according to plan
- Special plan for under 26
- A1 Visa Card for free (including theft insurance)

31% '14 **30%** '15

Value-for-money strategy with offers up to 6 GB including 4G, but more expensive than 3 Austria

- Tiered max. speed up to 150 Mbps
- JUHUI – for 4,99€/month you get a new device every 12 month
- Up to 200 voice minutes/SMS/MB to and within EU according to plan
- Top plan includes minutes to Turkey, Serbia and Bosnia-Herzegovina
- Many additional packages (insurance, etc.)

27% '14 **28%** '15

Price leadership strategy with offers up to 6 GB including 4G

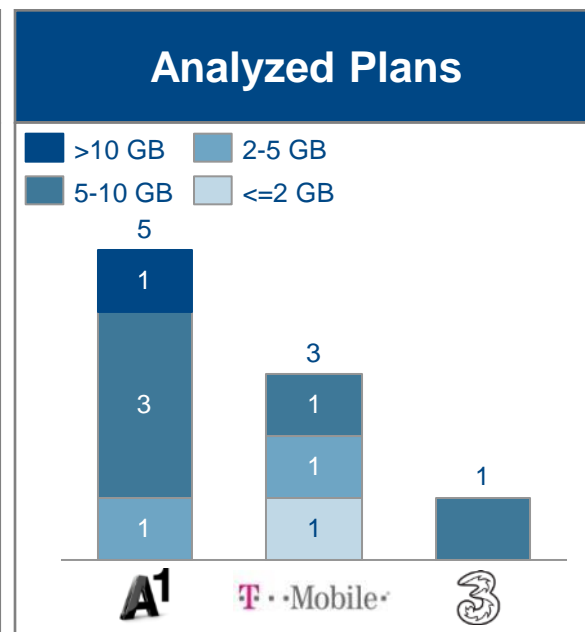
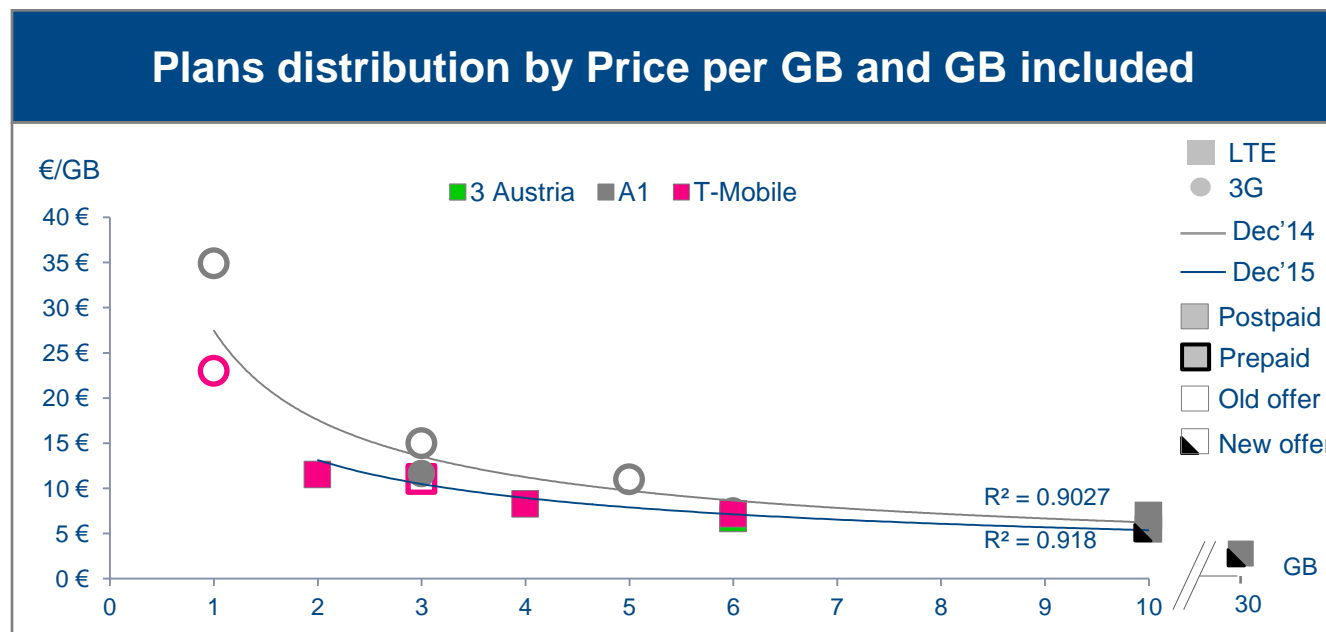
- Tiered max. speed up to 150 Mbps
- Includes 1 month Spotify and 2 GB Dropbox
- Very attractive roaming packages with up to 600 min to and within Europe/Unlimited SMS to Europe and 250 MB data in Europe (all not EU)
- Offers cheaper plans with less data, but no unlimited voice min/SMS (up to 3000 units)
- Unused Data can be taken into the following months

Sample: T-Mobile, 3 Austria, A1
*Source: Merrill Lynch Global Wireless Matrix





VOICE + DATA PLANS: Price per GB analysis



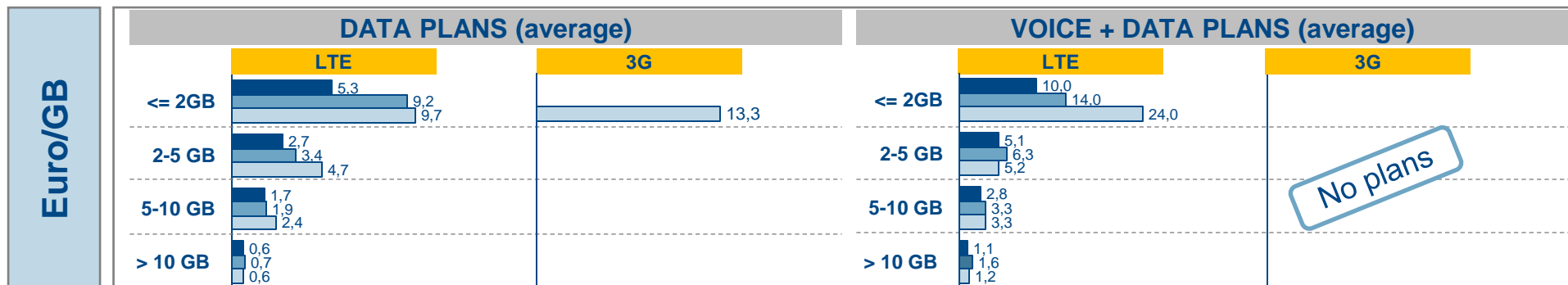
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
A1	4G				4G				4G	7.0	7.0	6.2	4G			2.5
	3G		34.9		3G		13.0	11.6	3G			7.5	3G			
T-Mobile	4G			11.5	4G		11.0	8.2	4G		7.2	7.2	4G			
	3G		23.0		3G				3G				3G			
3	4G				4G				4G			6.7	4G			
	3G				3G				3G				3G			
Average	4G			11.5	Average 4G		11.0	8.2	Average 4G	7.0	7.1	6.6	Average 4G			2.5
	3G		28.9		Average 3G		13.0	11.6	Average 3G			7.5	Average 3G			

Sample: T-Mobile, 3 Austria, A1

COUNTRY SUMMARY: main indicators of the country



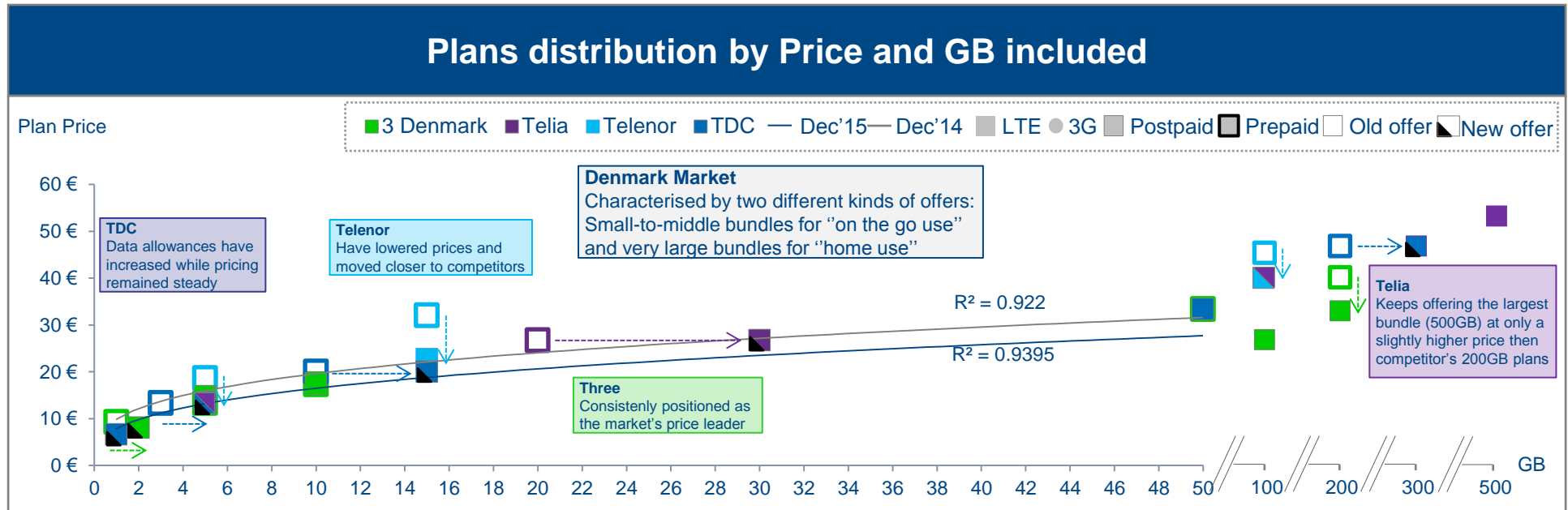
- Mobile broadband rates in Denmark are much higher than the EU average: mobile broadband penetration of 116% (vs. 72% EU average), LTE coverage of 99% (vs. 79% of EU average)
- Converging pricing and data allowances for most contracts
- Strong demand for data usage by customers - both at home and on-the-move
- Value added services: Telia offers entertainment services (HBO, Storytel, Spotify), Telenor productivity services (cloud storage, Office 365), TDC leisure services (TV-streaming), 3 offers Netflix with its larger data bundles



Source: Merrill Lynch Global Wireless Matrix, Arthur D. Little Analysis

2H15 2H14 2H13

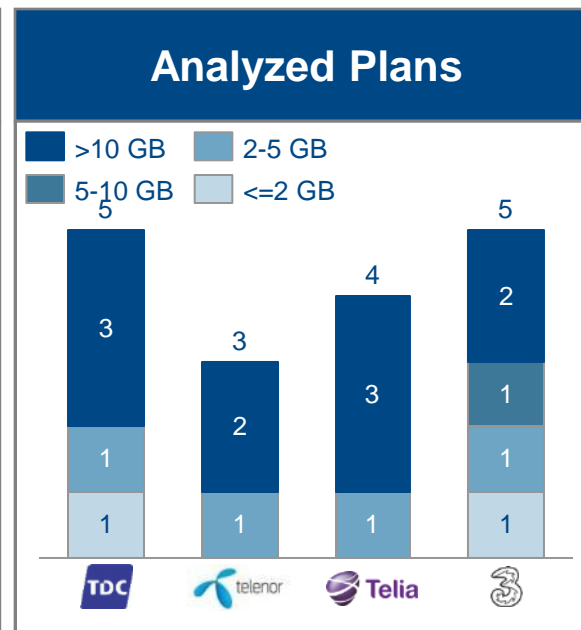
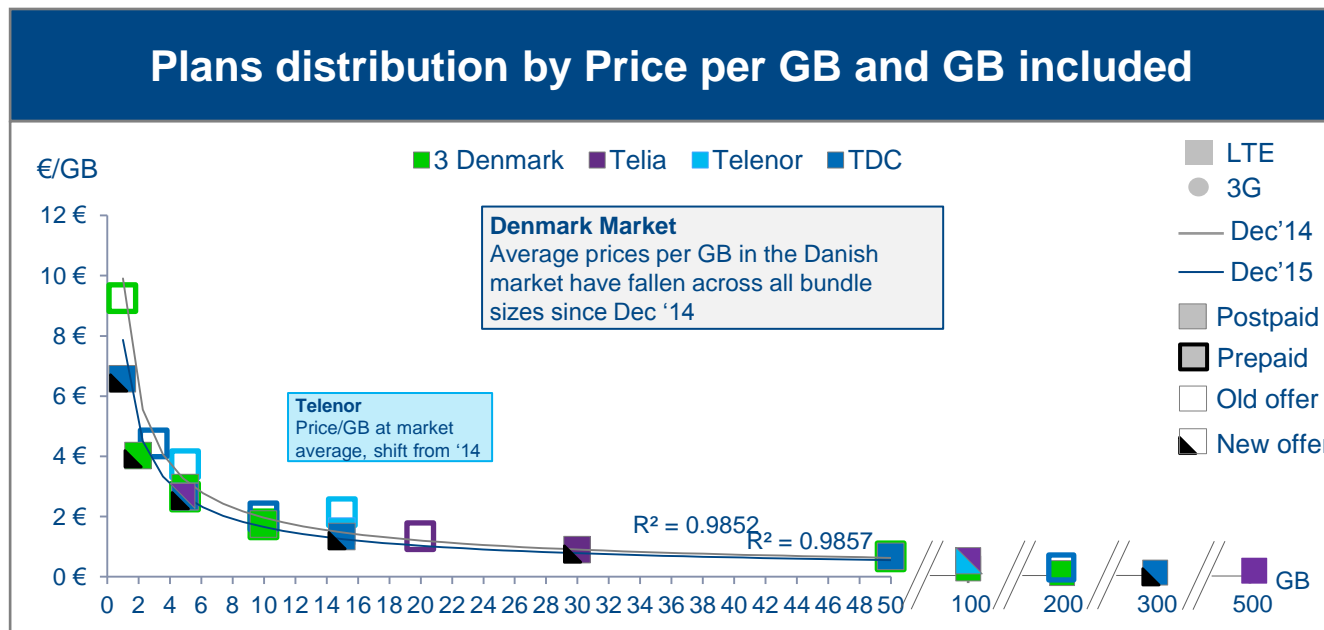
DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

<p>Competitive Price Strategy</p> <ul style="list-style-type: none"> 6 month retention SIM Only offers shown (30 days contract) Data allowances increased while pricing has not changed Value added services by offering cloud storage, e-books and music streaming <p>Market Share: '14 37%, '15 34%</p>	<p>Premium Price Strategy</p> <ul style="list-style-type: none"> 6 month retention SIM Only offers shown (30 days contract) Plan pricing has decreased while data allowances remain steady Offers family packages which reduce price and also include Office 365 including OneDrive <p>Market Share: '14 22%, '15 23%</p>	<p>Competitive Price Strategy</p> <ul style="list-style-type: none"> 1 month retention SIM Only offers shown (30 days contract) 20GB increased data allowance to 30GB Only provider to offer 500GB contract without minimum retention time Value added services by offering Spotify, HBO Nordic and Telia-TV <p>Market Share: '14 18%, '15 19%</p>	<p>Value for Price Strategy</p> <ul style="list-style-type: none"> 1 month retention SIM Only offers shown (30 days contract) Offers relatively large data allowances at competitive pricing Has either increased data allowance or reduced prices for several contracts since '14 Value added services by offering Netflix <p>Market Share: '14 13%, '15 14%</p>
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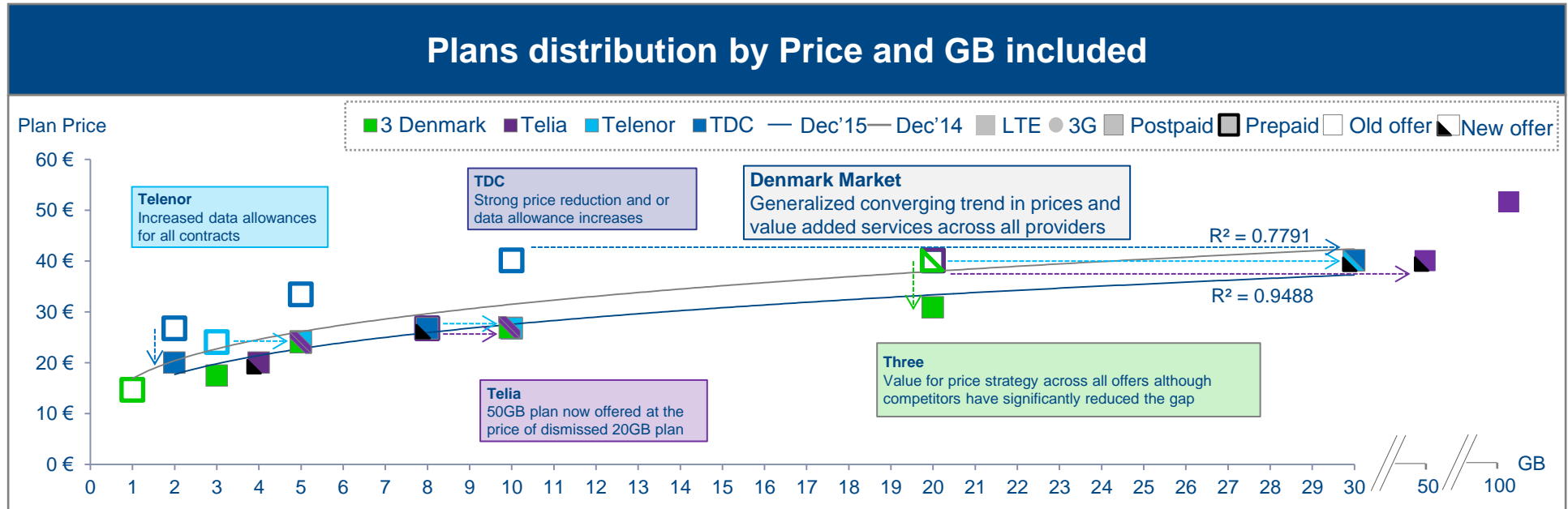
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
TDC	4G			6.6	4G	5.8	4.4	2.7	4G	2.7	2.0		4G		0.5	0.7
	3G	13.3			3G				3G				3G			
Telenor	4G	13.3			4G	3.7	3.7	2.7	4G				4G	1.3	1.3	1.0
	3G				3G				3G				3G			
Telia	4G	6.6			4G		2.7	2.7	4G	2.7			4G	0.3	0.6	0.5
	3G				3G				3G				3G			
3	4G	9.2	9.2	4.0	4G		2.7	2.9	4G	1.7	1.7	1.7	4G	0.4	0.4	0.2
	3G				3G				3G				3G			
Average	4G	9.7	9.2	5.3	4G	4.7	3.4	2.7	4G	2.4	1.9	1.7	4G	0.6	0.7	0.6
	3G	13.3			3G				3G				3G			

Sample: 3 Denmark, TDC, Telenor, Telia

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



Competitive Price Strategy

- 6 month retention SIM Only offers shown (30 days contract)
- Increased data allowances or lowered prices for all contracts
- TDC, Telia and Telenor perfectly overlap on pricing and bundle size for two contracts
- Value added service by offering Cloud Storage, e-books, music and more



Competitive Pricing Strategy

- No retention SIM Only offers shown (30 days contract)
- Increased data allowances and steady pricing for all contracts
- TDC, Telia and Telenor perfectly overlap on pricing and bundle size for two contracts
- Value added service by offering Cloud Storage and Office 365 licenses



Competitive Pricing Strategy

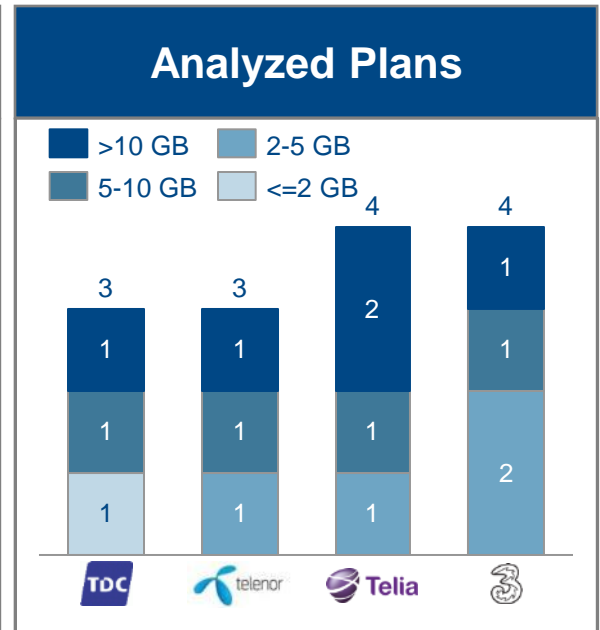
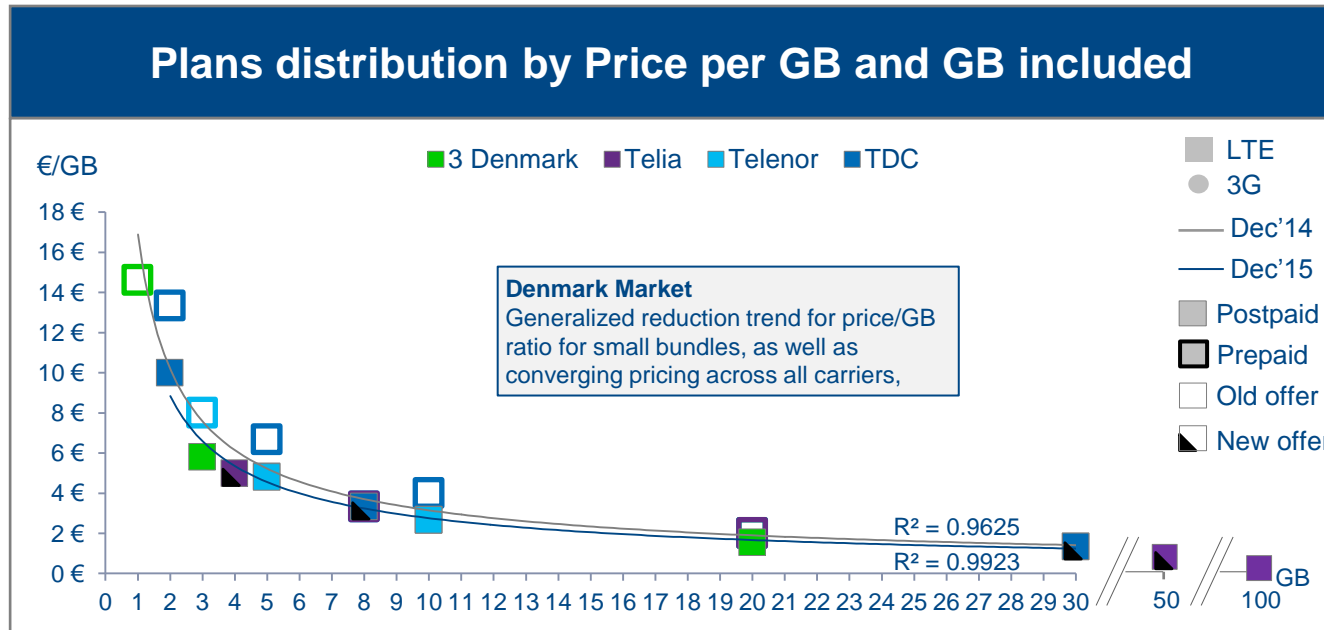
- No retention SIM Only offers shown (30 days contract)
- TDC, Telia and Telenor perfectly overlap on pricing and bundle size for two contracts
- Increased data allowances for several contracts
- Value added service by offering HBO Nordic, Storytel, Spotify and more



Value for Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Lowest or matching prices for all contracts
- Little change in contracts from '14
- Value added service by offering Netflix with larger data bundles

VOICE + DATA PLANS: Price per GB analysis



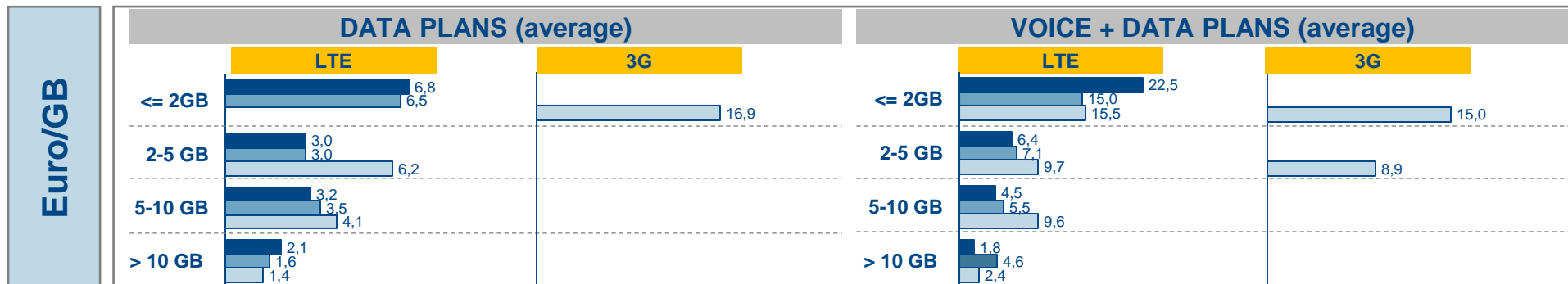
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
		TDC	4G	26.7	13.3	10.0	TDC	4G		6.7		TDC	4G		4.0	3.3	TDC	4G		1.3
		3G					3G					3G						3G		1.3
	Telenor	4G	24.0			Telenor	4G	5.3	8.0	4.8	Telenor	4G	4.0	3.3	2.7	Telenor	4G	2.0	2.0	1.3
		3G					3G					3G						3G		
	Telia	4G				Telia	4G	5.3		5.0	Telia	4G		3.3	2.7	Telia	4G	1.3	1.3	0.7
		3G					3G					3G						3G		
	3	4G	21.3	14.6		3	4G	4.8	5.3	5.3	3	4G	2.7	2.7	2.7	3	4G	0.4	2.0	1.5
		3G					3G					3G						3G		
	Average	4G	24.0	14.0	10.0	Average	4G	5.2	6.3	5.1	Average	4G	3.3	3.3	2.8	Average	4G	1.2	1.6	1.1
		3G					3G					3G						3G		

Sample: 3 Denmark, TDC, Telenor, Telia

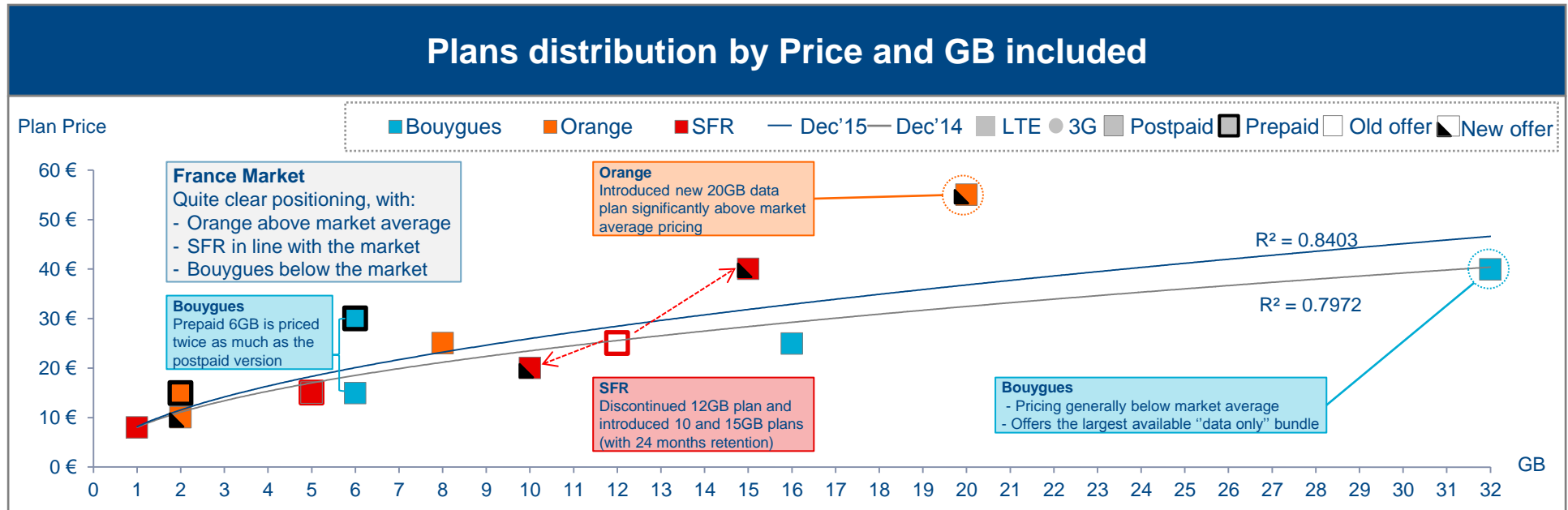
COUNTRY SUMMARY: main indicators of the country



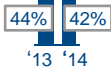
- The rollout of LTE mobile networks started relatively late but has progressed fast (75% LTE coverage vs. 79% EU average as of December 2014). The mobile broadband penetration is still low compared to EU average (65% vs. 72% as of December 2014)
- Prices have stabilized but MNOs have continued to increase data allowance
- MNOs are starting to communicate ARPU increase thanks to 4G due to consumers exceeding their data package
- Established MNOs compete through main and low cost second brands - Sosh for Orange, Red for SFR, B&You for Bouygues - while Free focuses on a single value-for-money plan including unlimited voice and 50GB of 4G data (but only 3GB of 3G data)
- Value added services are widely included in most MNOs offers: music, TV, cloud storage, international roaming, Wifi hotspot, etc.



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



Premium offers strategy.

- Marketing Communication based on network and customer experience
- Introduced new 20GB data plan significantly above market average
- Several services included with the offers (Wifi, cloud storage, TV, data roaming etc...)



Mixed strategy

- Competitive offers in the small allowances (up to 10 GB)
- Above market average for its 15 GB plan (out of scope, however as it has a 12 months)
- Several services included with the offers (Wifi, cloud storage, TV, etc...)



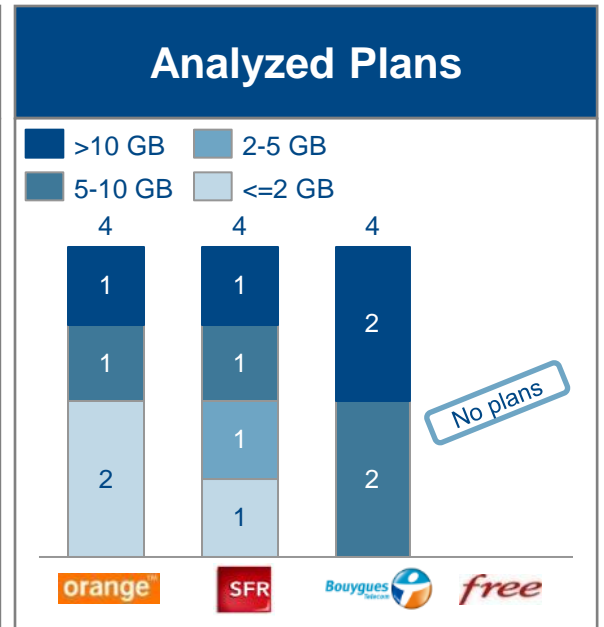
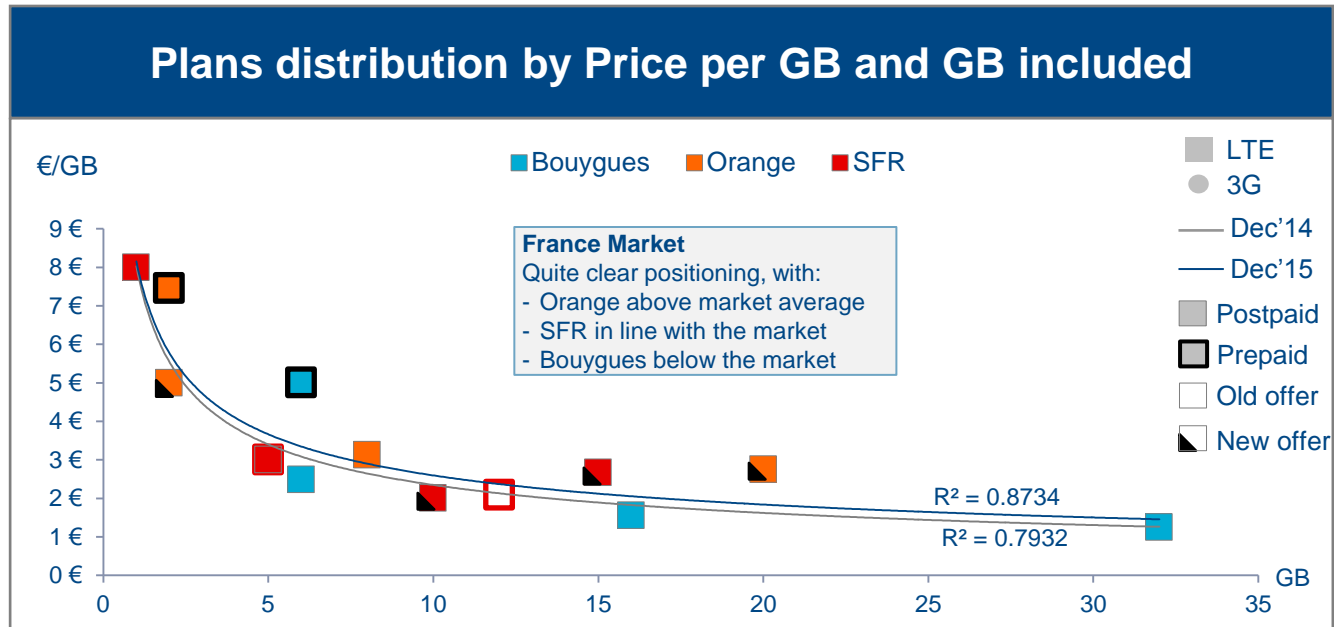
Price leadership strategy:

- Competitive price covering larger than market allowances (up to 32 GB)
- Offers a Prepaid 6GB at a premium with respect to the postpaid version
- Several services included with the offers (Wifi, cloud, TV, data roaming etc...)
- TV service offered with zero rating



Free does not offer Data Plans (only voice + data) but the SIM card could also be used on dongles

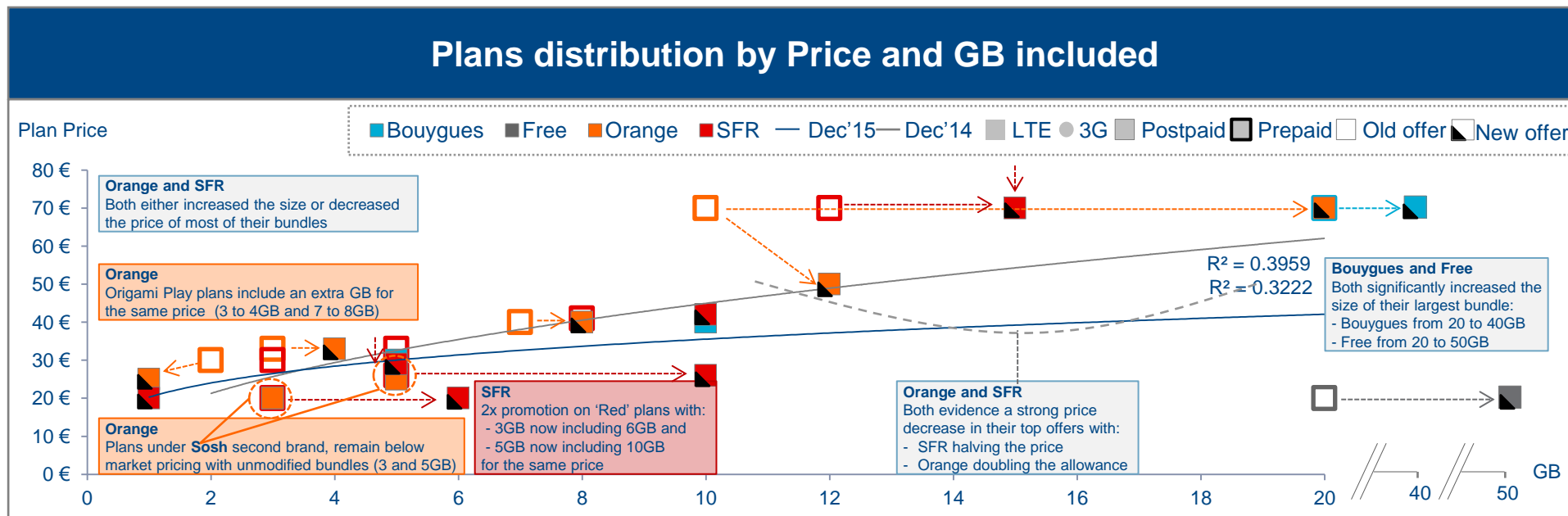
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
	4G	orange		5.0	6.2	orange	7.4			orange	5.7	3.1	3.1	orange		
3G		16.9														
4G	SFR		8.0	8.0	SFR	5.0	3.0		SFR	4.2		2.0	SFR		2.1	2.7
3G																
4G	Bouygues				Bouygues				Bouygues	2.5	3.7	3.7	Bouygues	1.4	1.4	1.4
3G																
4G	free				free				free				free			
3G																
Average	4G		6.5	6.8	Average	6.2	3.0		Average	4.1	3.5	3.2	Average	1.4	1.6	2.1
	3G	16.9														

Sample: Orange, BouyguesTelecom, SFR, Free

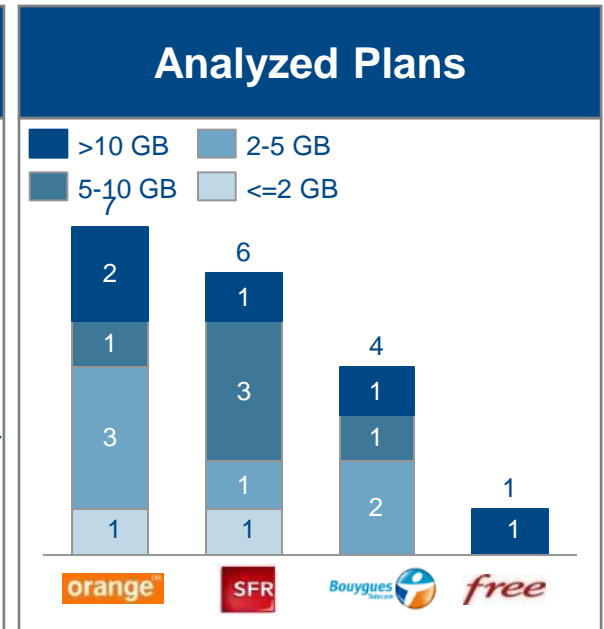
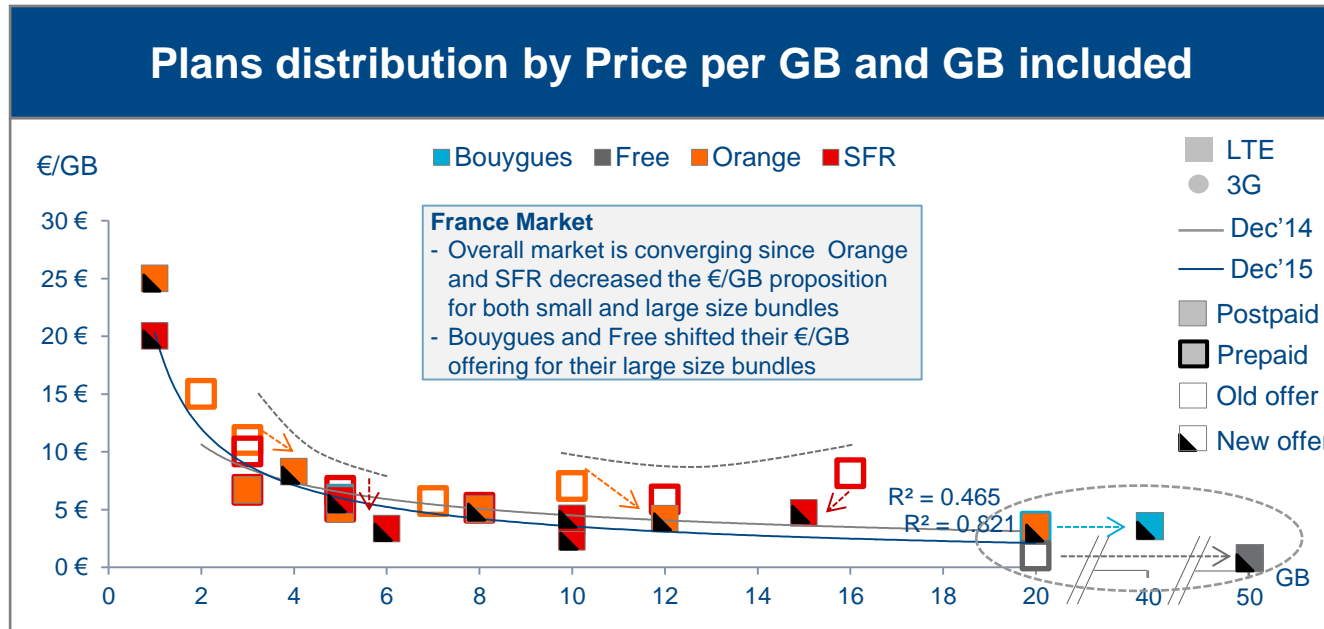
VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

<p>44% '14 42% '15</p> <p>Premium strategy with Orange brand, value-for-money strategy with Sosh brand:</p> <ul style="list-style-type: none"> High end offers through the Orange brand and network (with significantly decreased pricing for large GB bundles) "Low cost" offers SIM only without retention through a second brand "Sosh" Several services included in almost all offers (Orange TV, Wifi Hotspots, cloud storage, international roaming etc..) 	<p>32% '14 31% '15</p> <p>Premium strategy with Orange brand, value-for-money strategy with Red brand:</p> <ul style="list-style-type: none"> High end offers through the SFR brand (with decreased pricing for large bundles) "Low cost" offers SIM only without retention through a second brand "Red", now even cheaper with 2x data promotion Several services included in almost all offers (cloud storage, international roaming, Wifi and one option to select VOD, newspaper, music, etc..) 	<p>17% '14 17% '15</p> <p>Market strategy of large size plans</p> <ul style="list-style-type: none"> Offers different voice + data plans through the Bouygues Telecom brand with service and content applications (CanalPlay, Spotify, Gameloft, ...) Offers unlimited voice+ different data plans through the B&You brand SIM only Doubled the size of its 20 bundle to 40GB Several services included in almost all offers (TV, cloud, roaming, Wifi etc..) TV service offered with zero rating 	<p>8% '14 10% '15</p> <p>Best value-for-money strategy :</p> <ul style="list-style-type: none"> A unique mobile plan including high voice and data usage that could be used on 3G (3GB) and 4G (50 GB) No retention plan Several services included (international roaming, Wifi Hot, etc..), but no content (video, music, games, ...)
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VOICE + DATA PLANS: Price per GB analysis



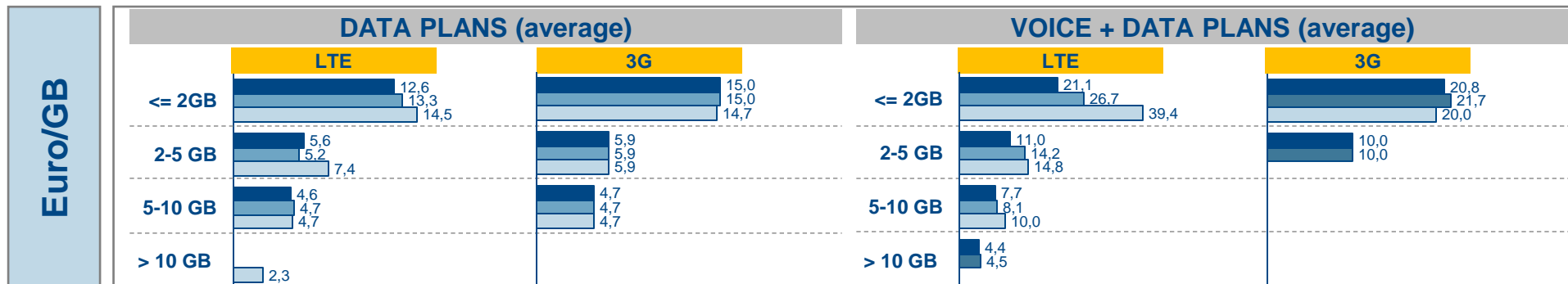
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15				
	orange	4G	15.5	15.0	25.0	orange	4G	10.2	7.6	6.6	orange	4G	10.0	6.4	5.0	orange	4G		3.8	
	3G					3G	10.0				3G					3G				
	SFR	4G		20.0	SFR	4G	9.3	7.1	5.8	SFR	4G	11.7	5.1		SFR	4G		0.8		
		3G				3G	8.3				3G					3G				
	Bouygues	4G			Bouygues	4G	10.0	6.3	6.3	Bouygues	4G	5.0	4.0	4.0	Bouygues	4G	3.7	3.5	3.5	
		3G				3G					3G					3G				
	free	4G			free	4G				free	4G				free	4G	1.0	1.0	0.4	
		3G				3G					3G					3G				
	Average	4G	15.5	15.0	22.5	Average	4G	9.7	7.1	6.4	Average	4G	9.6	5.5	4.5	Average	4G	2.4	4.6	1.8
		3G	15.0				3G	8.9				3G					3G			

Sample: Orange, BouyguesTelecom, SFR, Free

COUNTRY SUMMARY: main indicators of the country



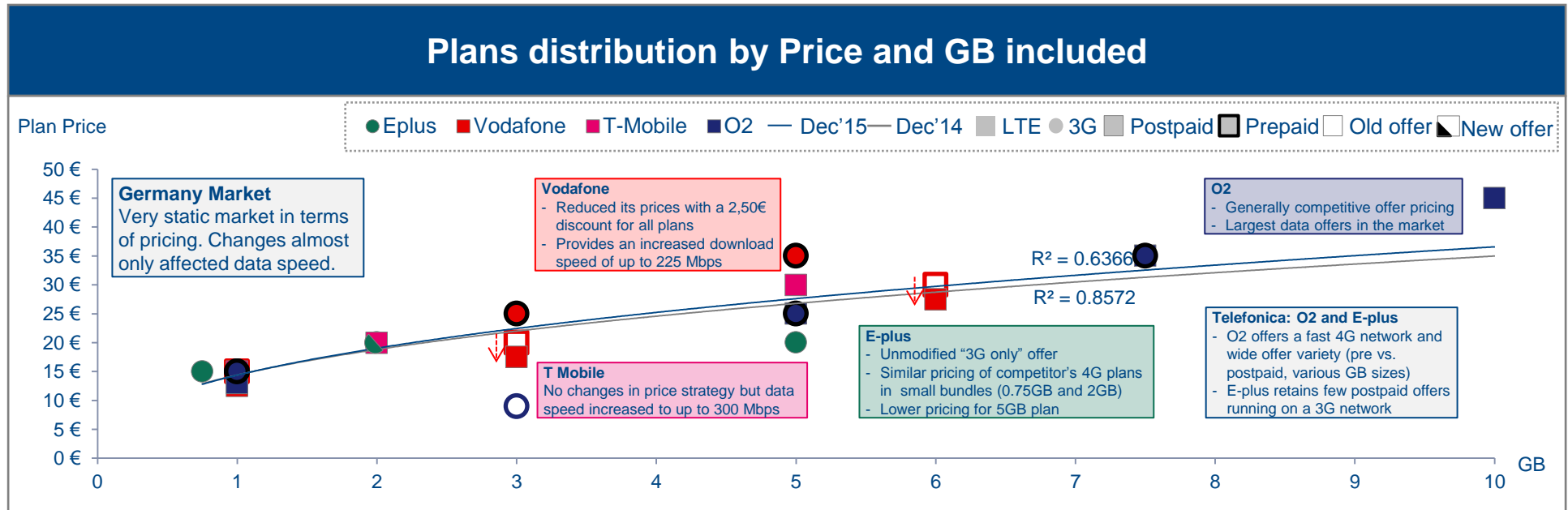
- Market penetration of mobile broadband reached 65% as of December 2014 (EU average: 72%). Germany's LTE broadband coverage reached 92%, a very high level compared to the 79% EU average.
- O2 merger with E-Plus reduced the number of MNOs from 4 to 3 and may lead to competitive implications.
- The offer of "Data only" tariffs remained fairly static, whereas with respect to "unlimited voice + data" plans, most operators increased data allowances or slightly decreased prices. E-Plus was the only MNO to leave its offer mostly unchanged since 2014
- Providers offer different strategies on value added services: Vodafone & E-Plus offer Music & Cloud; O2 integrated landline service and additional sim card(s) for free, whereas T-Mobile includes (in some plans) VoIP and a Hotspot-Flat



Source: Merrill Lynch Global Wireless Matrix, Arthur D. Little Analysis

■ 2H15 ■ 2H14 ■ 2H13

DATA PLANS: Strategy, prices and GB included in the offers analysis

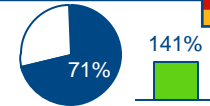


Strategy outline

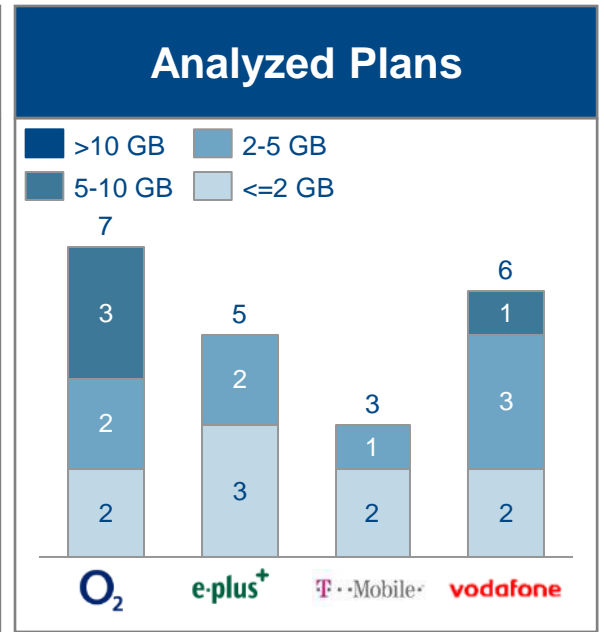
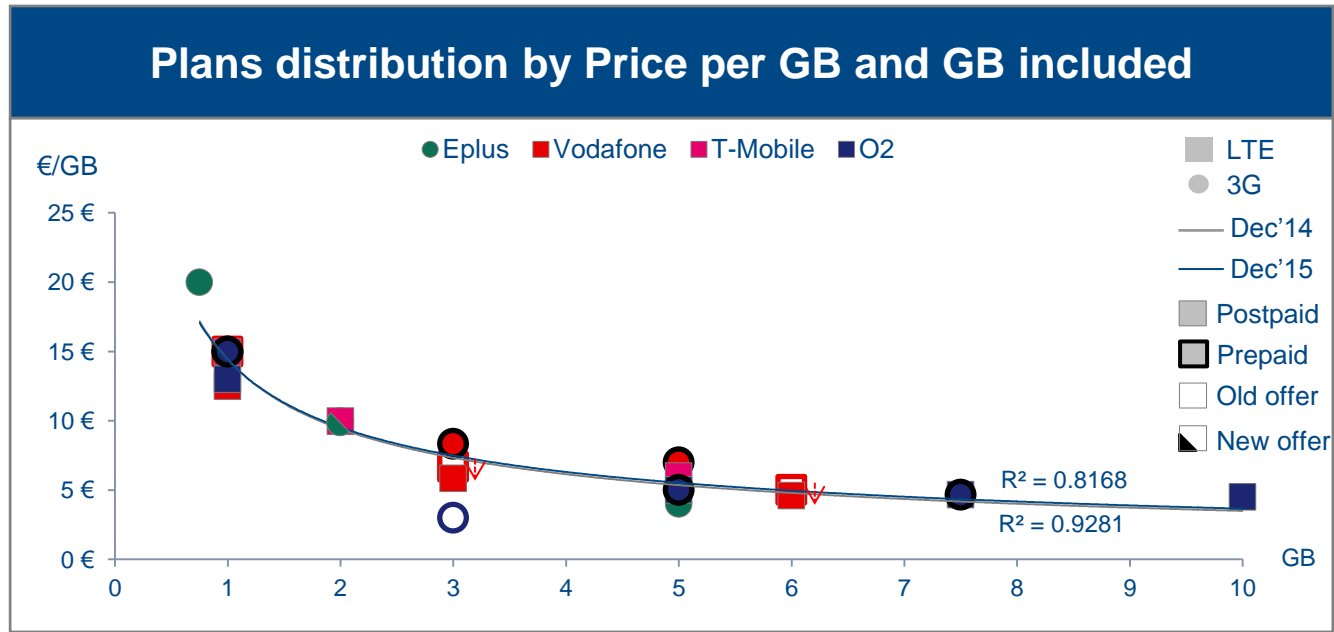
<p>O2 37% '14 37% '15</p> <p>Competitive offers</p> <ul style="list-style-type: none"> First 2 months (up to 4) extra GB available Cheapest plan has the most extra GB Price increase after the 13th month (additional 2-5 Euro monthly) Tiered max. speed up to 50 Mbps Offer also Prepaid-Plans for same price as Postpaid-Plans, but no 4G Postpaid-Plans only in combination with minimum 24 month-retention 	<p>e-plus+ 34% '14 34% '15</p> <p>No frills low-price strategy for 3G only offers</p> <ul style="list-style-type: none"> Competitive prices, but "3G only" tariffs Tiered max. speed only up to 7.2 Mbps, but temporary 42 Mbps (till end of 2015) Entertainment: Music Unlimited powered by MTV Music Napster 10 GB free cloud storage for top price plan Offer plans with and without Music Flat 	<p>T-Mobile 34% '14 34% '15</p> <p>Premium offers</p> <ul style="list-style-type: none"> Fastest network with tiered max. speed up to 300 Mbps Price increase after the 13th month (additional 2-3 Euro monthly) 3 months Spotify for free Wi-Fi Hotspots and VoIP included Prepaid-Plans only up to 500 MB 	<p>vodafone 28% '14 28% '15</p> <p>Simple and Competitive offers strategy with small/medium data allowances (up to 6 GB):</p> <ul style="list-style-type: none"> Price increase after 24 month Prepaid have 3G connectivity with limited speed (7.2 Mbps) Postpaid offer is not speed tiered and provides max. LTE speed up to 225 Mbps for customers to experience network quality
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Sample: T-Mobile, Vodafone, E-plus, O2
*Source: Merrill Lynch Global Wireless Matrix





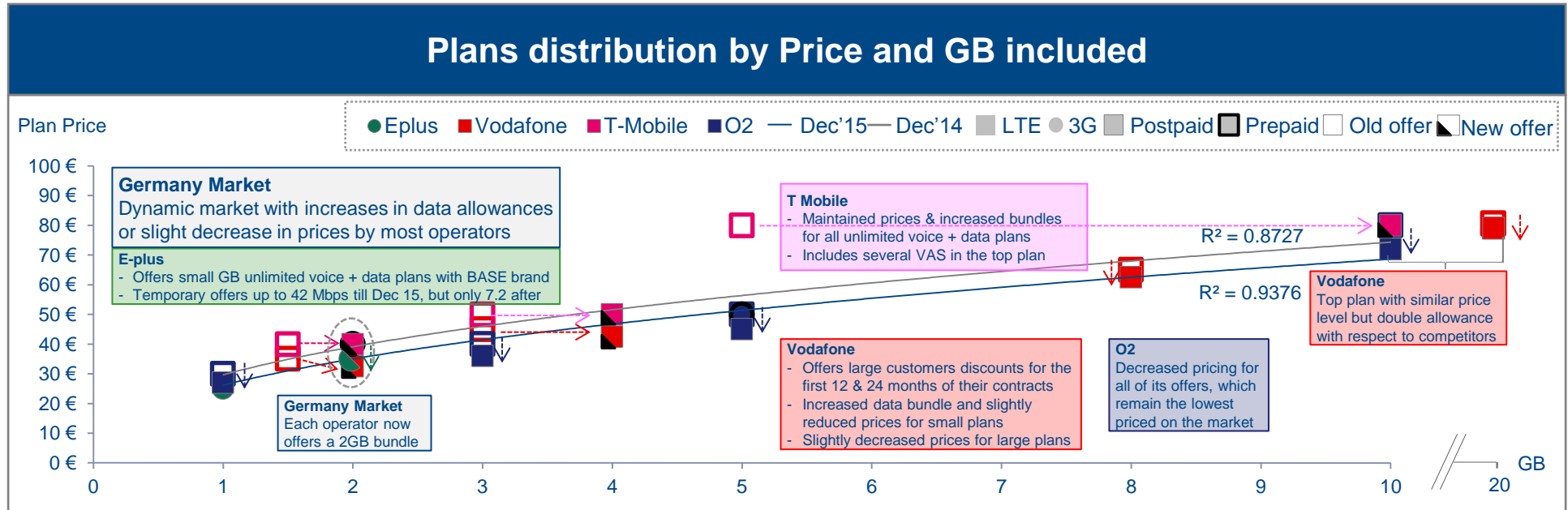
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
	O ₂	4G	9.0		13.0	O ₂	4G	5.0	4.0	5.0	O ₂	4G	4.7	4.6	4.6	O ₂	4G			
	3G	15.0	15.0	15.0		3G	5.0	5.0	5.0		3G	4.7	4.7	4.7		3G				
e-plus ⁺	4G				e-plus ⁺	4G				e-plus ⁺	4G				e-plus ⁺	4G				
	3G	15.0	15.0	15.0		3G	4.5	4.5	4.5		3G					3G				
T	4G	20.0	12.5	12.5	T	4G	10.0	6.0	6.0	T	4G	5.0			T	4G	2.3			
	3G					3G					3G					3G				
Vodafone	4G		15.0	12.5	Vodafone	4G	7.3	6.7	5.8	Vodafone	4G	4.6	5.0	4.6	Vodafone	4G				
	3G	14.0	15.0	15.0		3G	7.7	7.7	7.7		3G					3G				
Average	4G	14.5	13.3	12.6	Average	4G	7.4	5.2	5.6	Average	4G	4.7	4.7	4.6	Average	4G	2.3			
	3G	14.7	15.0	15.0		3G	5.9	5.9	5.9		3G	4.7	4.7	4.7		3G				

Sample: T-Mobile, Vodafone, E-plus, O2

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis

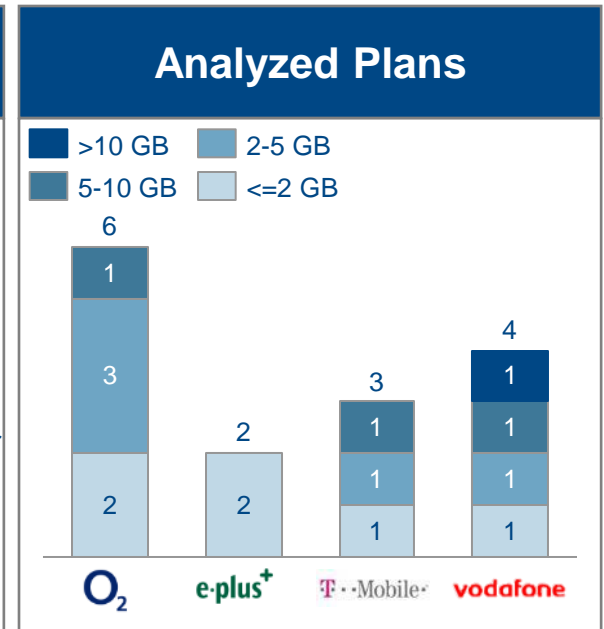
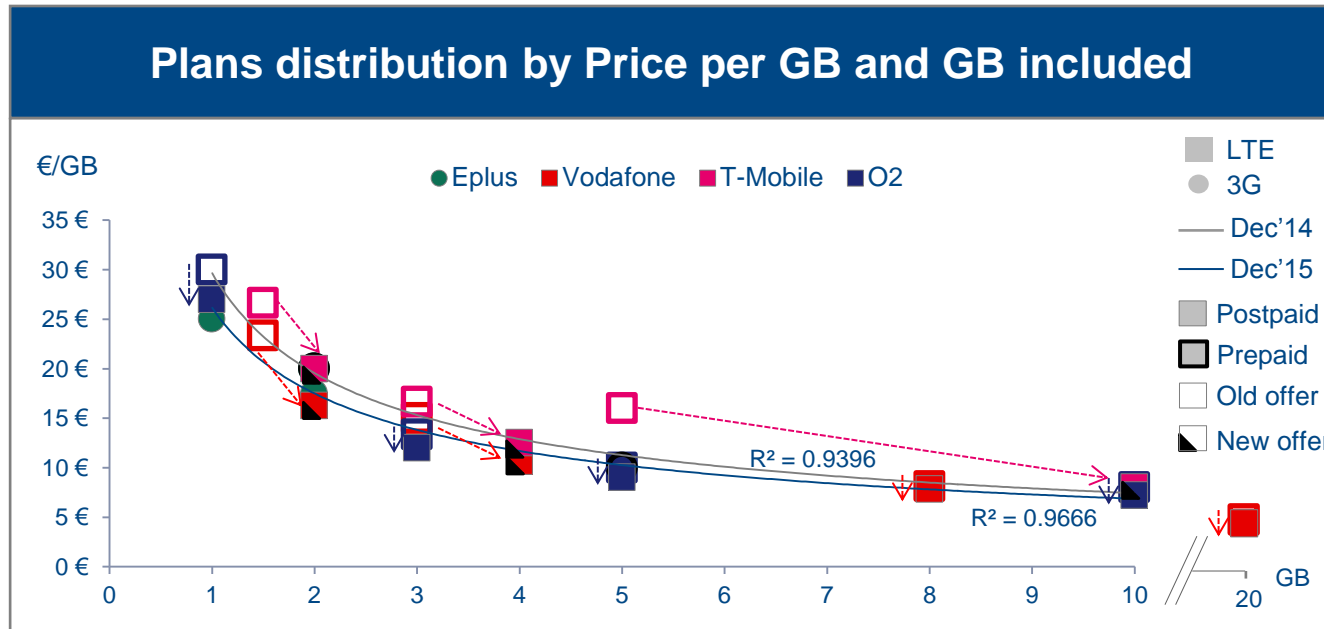


Strategy outline

<p>O2 37% '14 37% '15</p> <p>Competitive pricing with offers up to 10 GB:</p> <ul style="list-style-type: none"> Tiered max. speed up to 50 Mbps Plans with 24 and one month retention, but plans without bond are more expensive 24-Month-Plans offer a discount for the first 24 months Up to 200 voice minutes/SMS to and within EU + 1 GB Data according to plan Up to 2 additional sim cards Landline number included 	<p>e-plus+ '14 '15</p> <p>Simple and Competitive offers strategy with small data allowances on 3G network:</p> <ul style="list-style-type: none"> Temporary max. speed up to 42 Mbps Up to 10 GB free cloud storage Only in Top plan: Napster Music Flat and Kaspersky protection program Landline number included 	<p>T-Mobile 34% '14 34% '15</p> <p>Premium price strategy based on data offers with high speed</p> <ul style="list-style-type: none"> Tiered max. speed: up to 300 Mbps Price increase after 12 month Top Plan includes: Wi-Fi hotspots, 2 additional sim cards, landline phone number, call, data and SMS in EU → much more VAS than other plans Cheaper Plans only include: Spotify free for 3 months and VoIP, but already up to 150 Mbps 	<p>vodafone 28% '14 28% '15</p> <p>4G competitive strategy with a wide range of offers and incremental data up to 20 GB:</p> <ul style="list-style-type: none"> Large discounts for first 12 & 24 month Up to 100 GB Cloud Storage Vodafone TV and Deezer Music included, which, together with un-tiered max. LTE speed of up to 225 Mbps allows customers to experience network quality Tiered max. speed up to 225 Mbps Abroad Units included the first 6 months Up to 2.4 GB Blackberry Service included
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Sample: T-Mobile, Vodafone, E-plus, O2
*Source: Merrill Lynch Global Wireless Matrix

VOICE + DATA PLANS: Price per GB analysis



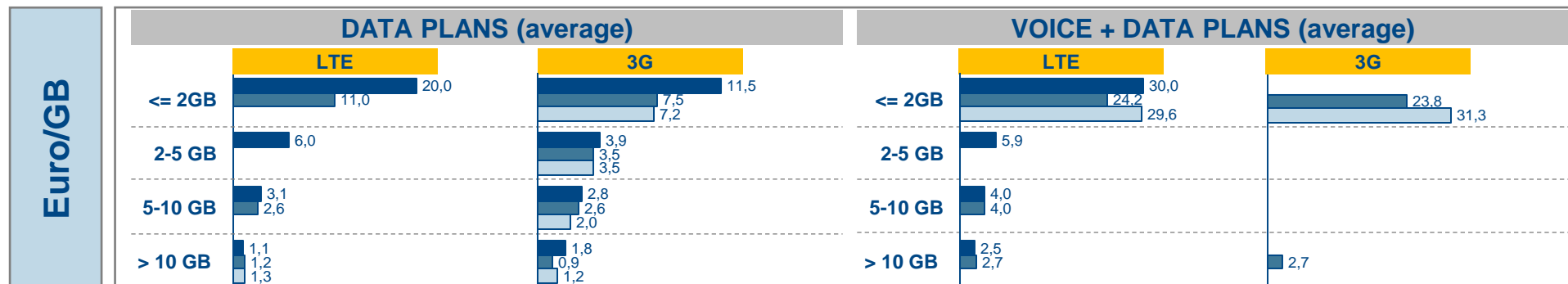
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
	O ₂	4G	20.0	30.0	27.0	O ₂	4G	10.0	11.7	10.5	O ₂	4G		8.0	7.2	O ₂	4G			
	3G		20.0	20.0		3G		10.0	10.0		3G						3G			
e-plus ⁺	4G				e-plus ⁺	4G				e-plus ⁺	4G				e-plus ⁺	4G				
	3G	20.0	22.5	21.3		3G					3G					3G				
T	4G	42.4	26.6	20.0	T	4G	14.4	16.3	12.5	T	4G			8.0	T	4G				
	3G					3G					3G					3G				
Vodafone	4G	50.0	23.3	16.2	Vodafone	4G	20.0	15.0	10.6	Vodafone	4G	10.0	8.1	7.8	Vodafone	4G		4.5	4.4	
	3G					3G					3G					3G				
Average	4G	39.4	26.7	21.1	Average	4G	14.8	14.2	11.0	Average	4G	10.0	8.1	7.7	Average	4G		4.5	4.4	
	3G	20.0	21.7	20.8		3G		10.0	10.0		3G					3G				

Sample: T-Mobile, Vodafone, E-plus, O2

COUNTRY SUMMARY: main indicators of the country



- Both mobile broadband penetration (82% as of December 2014) and LTE coverage (87%) are significantly wider than the EU average 72% and 79% respectively
- The most significant change in the market over the past few months was the acquisition of O2 Ireland by the MNO 3 Ireland, significantly increasing 3's market share
- Tariff prices have marginally increased in the "data only" market, remained relatively unchanged for unlimited voice + data plans
- 3G tariffs remain widespread in the "data only" market
- Differentiation between operators is mostly evident for tariffs that include low data bundles

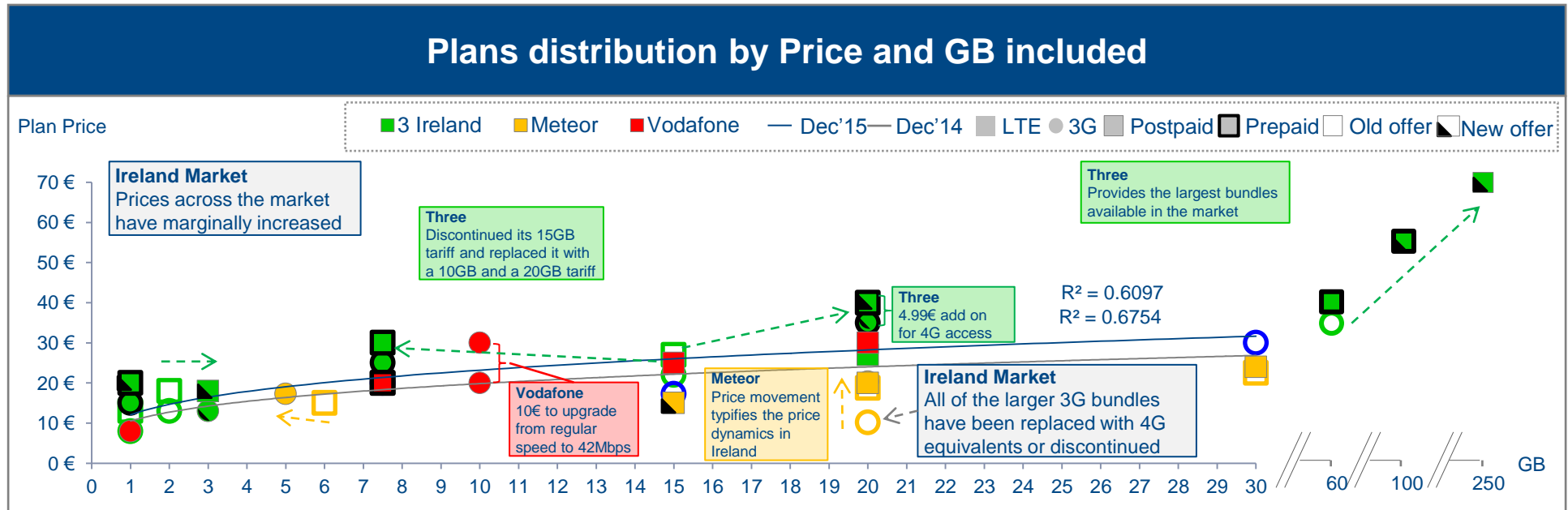


Source: Irish Commission for Communication Regulation

2H15 2H14 2H13



DATA PLANS: Strategy, prices and GB included in the offers analysis



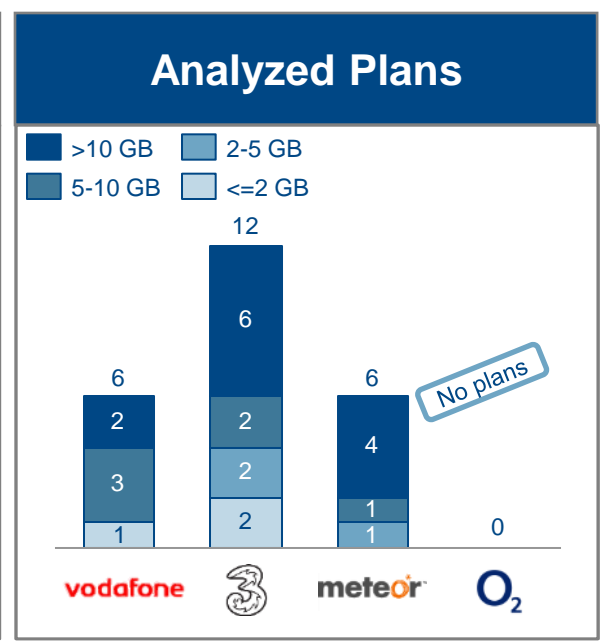
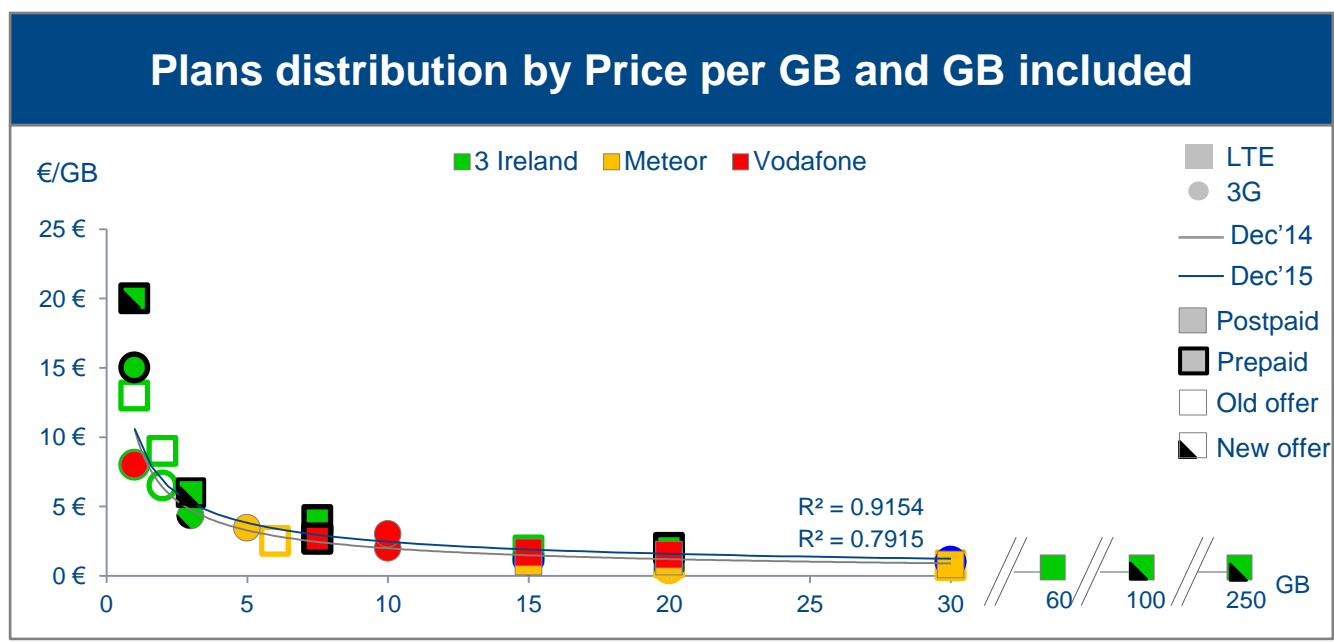
Strategy outline

<p>vodafone</p> <p>Market average prices based on:</p> <ul style="list-style-type: none"> 4G large GB bundles and 3G low GB bundles Long retention for 15 & 20GB postpaid tariffs is also available with a free dongle Option to increase speed of 3G connection for 10€ Prices have remained completely unchanged since last semester 	<p>3</p> <p>Premium price market leader based on:</p> <ul style="list-style-type: none"> Tariffs across the GB bundle spectrum Only carrier to offer very large bundles Prepaid 4G bundles 4.99€ more than the 3G equivalent All offers have access to 3Plus: a variety of discounts and offers on tickets and entertainment opportunities 	<p>meteor</p> <p>Price leadership strategy based on:</p> <ul style="list-style-type: none"> Prices consistently the lowest in each data size offered Prices have evolved in-line with market dynamics Only one 3G tariff remaining, which is its lowest GB offer Supplemented by deals such as free cinema tickets and 2 for 1 dining 	<p>O₂</p> <p>Acquired by 3 Ireland in June 2015. Its tariffs were removed and not replaced by equivalent deals at 3.</p>
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Sample: 3 Ireland, Meteor, O2, Vodafone



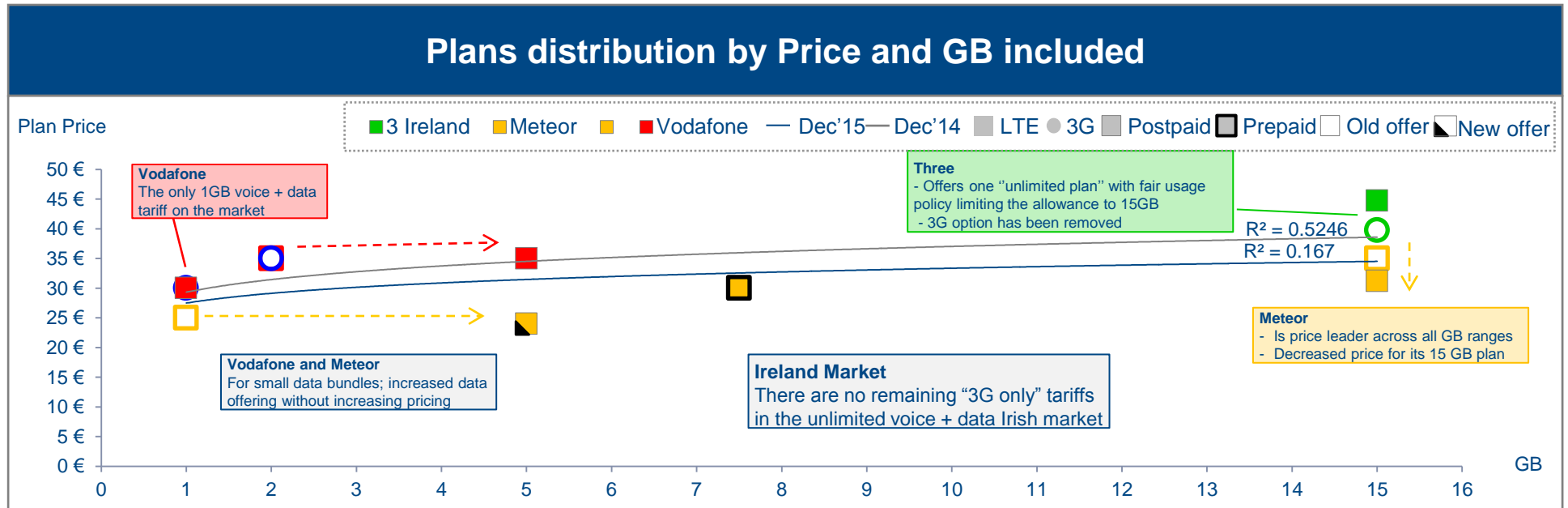
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Vodafone	4G				4G				4G		2.7	2.7	4G		1.6	1.6
	3G		8.0	8.0	3G				3G	2.0	2.5	2.5	3G	1.5		
3	4G		11.0	20.0	4G			6.0	4G			4.0	4G		1.2	1.0
	3G	7.2	7.2	15.0	3G			4.3	3G			3.3	3G	1.0	1.0	1.8
Meteor	4G				4G				4G		2.6	2.7	4G	1.1	0.8	0.9
	3G				3G	3.5	3.5	3.5	3G	2.0			3G		0.5	1.0
O ₂	4G				4G				4G				4G			
	3G				3G				3G		2.7		3G	1.4	1.1	
Average	4G		11.0	20.0	4G			6.0	4G		2.6	3.1	4G	1.1	1.2	1.1
	3G	7.2	7.5	11.5	3G	3.5	3.5	3.9	3G	2.0	2.6	2.8	3G	1.2	0.9	1.4

Sample: 3 Ireland, Meteor, O2, Vodafone

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



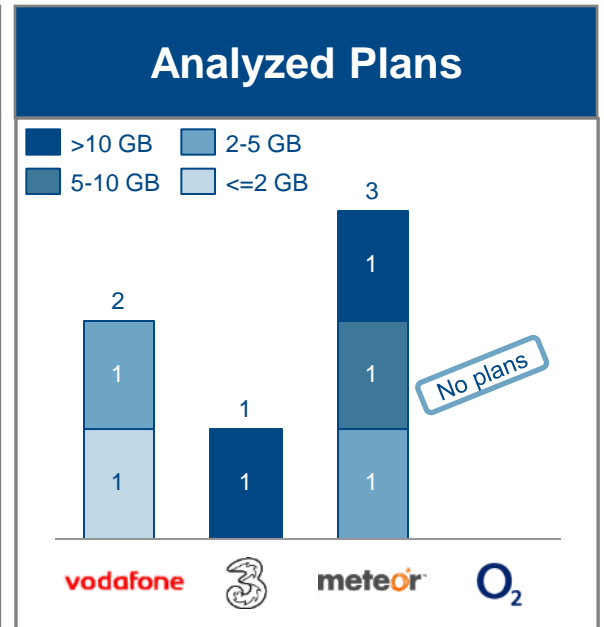
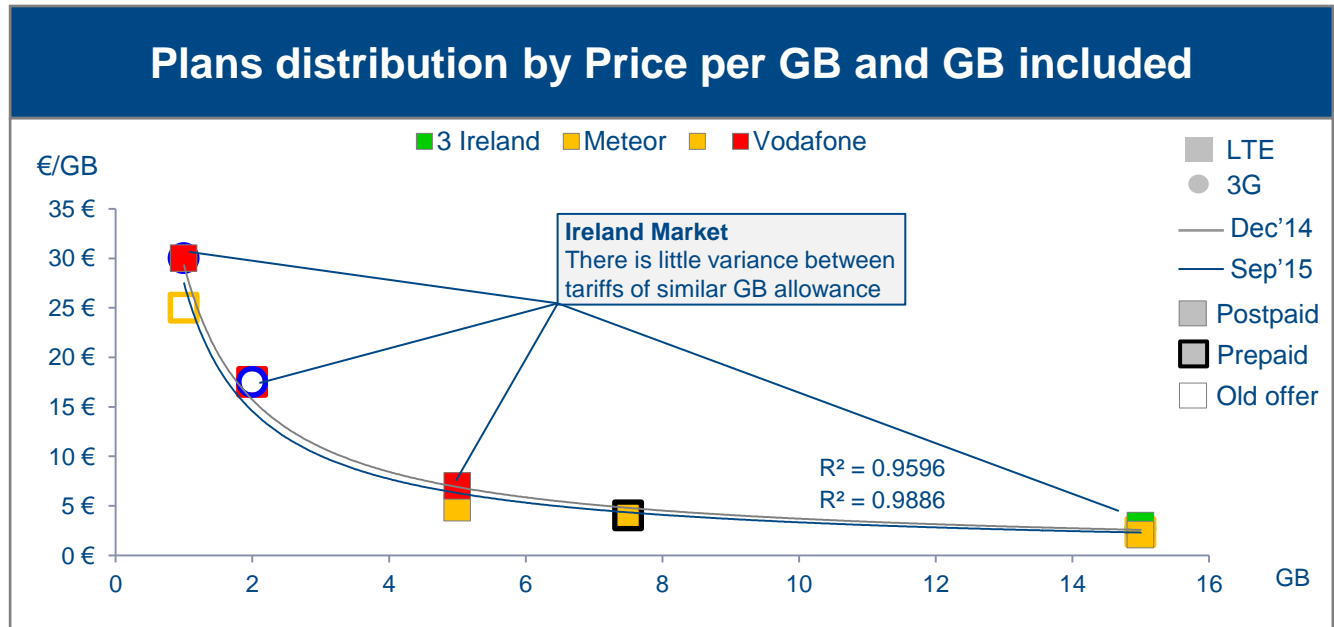
Strategy outline

<p>39% '14, 38% '15</p> <p>Market average price strategy based on:</p> <ul style="list-style-type: none"> Tariffs including small data bundles Differentiating its offer with a mid-size bundle (5GB) replacing a 2GB bundle Tariffs also offer 100 minutes of international calls and 100 texts with tariffs Share plans are also available at €20 	<p>10% '14, 35% '15</p> <p>Premium price leadership based on:</p> <ul style="list-style-type: none"> Only one voice + data tariff available Offers sole unlimited voice + data plan including a large GB bundle with 'unlimited' minutes(15GB fair usage) Price moved in the opposite direction to the market Includes access to 3Plus: a variety of discounts and offers on tickets and entertainment opportunities 	<p>19% '14, 19% '15</p> <p>Price leadership strategy based on:</p> <ul style="list-style-type: none"> The widest choice of voice + data tariffs offered by any operators All tariff prices are below the market average Prices moved in line with the market supplemented by deals such as free cinema tickets and 2 for 1 dining 	<p>26% '14, 19% '15</p> <p>Acquired by 3 Ireland in June 2015. Its tariffs were removed and not replaced by equivalent deals at 3.</p>
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Sample: 3 Ireland, Meteor, O2, Vodafone
 * Source: Irish Commission for Communication Regulation



VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



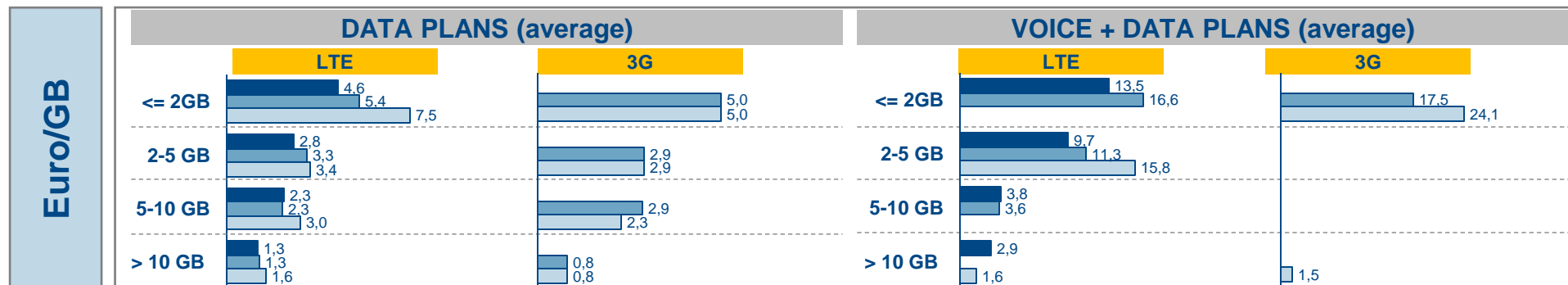
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Vodafone	4G				4G			7.0	4G				4G			
	3G				3G				3G				3G			
3	4G				4G				4G				4G		3.0	3.0
	3G				3G				3G				3G		2.7	
Meteor	4G	26.8	25.0		4G			4.8	4G			4.0	4.0		2.3	2.1
	3G				3G				3G				3G			
O2	4G				4G				4G				4G			
	3G	31.3	23.8		3G				3G				3G			
Average	4G	29.6	24.2	30.0	4G			5.9	4G			4.0	4.0		2.7	2.5
	3G	31.3	23.8		3G				3G				3G		2.7	

Sample: 3 Ireland, Meteor, O2, Vodafone

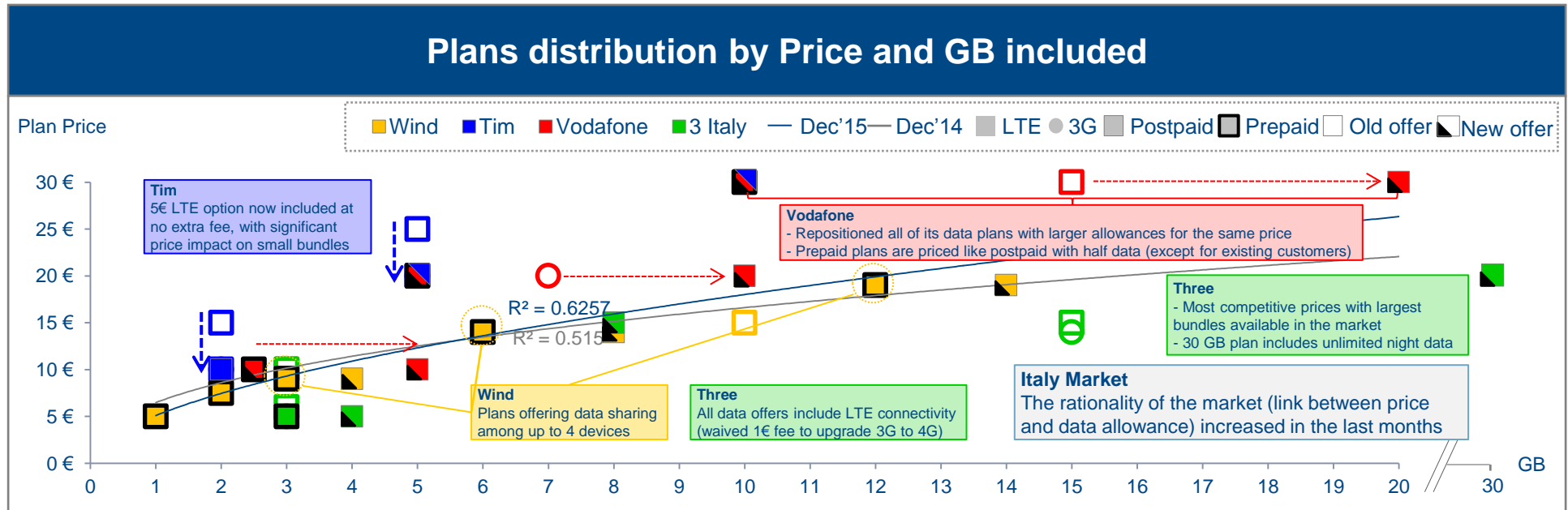
COUNTRY SUMMARY: main indicators of the country



- LTE networks deployment is progressing quickly, with coverage reaching 77% at the end of 2014 vs. an EU average of 79,4%.
- As of 2015, all of the Italian plans in scope offer 4G connectivity, in addition to 3G connectivity, at no extra fee. The market keeps trending towards a generalized decrease in price per GB, paired with an increase in the size of data allowances.
- TIM and Vodafone are positioned as the prime players in the market, with premium priced tariffs running on reliable networks, and generally including Value Added Services such as media on demand, music, gaming and news.
- Wind and Three hold a no frills value-for-price positioning. The 2 operators announced an agreement to form a joint venture of their telecoms businesses, which would reduce the number of MNOs from 4 to 3 and lead to possible competitive implications.



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



35% '14 34% '15

Premium positioning with Customer cross selling strategy based on:

- GB x2 for Telecom fixed line customers
- No retention offers shown
- 5 GB and 10 GB plans overlapping with Vodafone's offering
- Waived 5€ LTE option for small bundles
- Tim Vision contents: choice of Sports or Entertainment streaming (free for top tariff)



29% '14 29% '15

Simple and Premium offers based on:

- Prepaid offers with above market-average prices (double allowances for postpaid)
- 5 and 10 GB plans overlapping with TIM's
- Internet Services like Rete Sicura (antivirus, malware and phishing, etc.) free for 12 months
- Entertainment Contents free trial (3-6 months: Spotify, Infinity (Movies, series), Calcio) or a free magazine for 1 month



25% '14 25% '15

Simple tariffs with competitive offers strategy based on:

- Wide set of allowances available
- Sharing of the allowance with up to 4 people for the 3/6/12 GB plans
- Tablet included with 30 months retention
- No additional services (No frills)
- Roaming at 32 Kbps after data allowance consumption

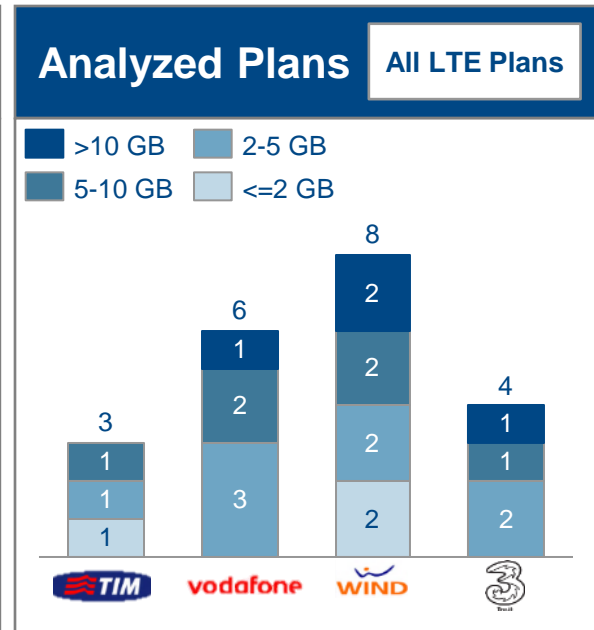
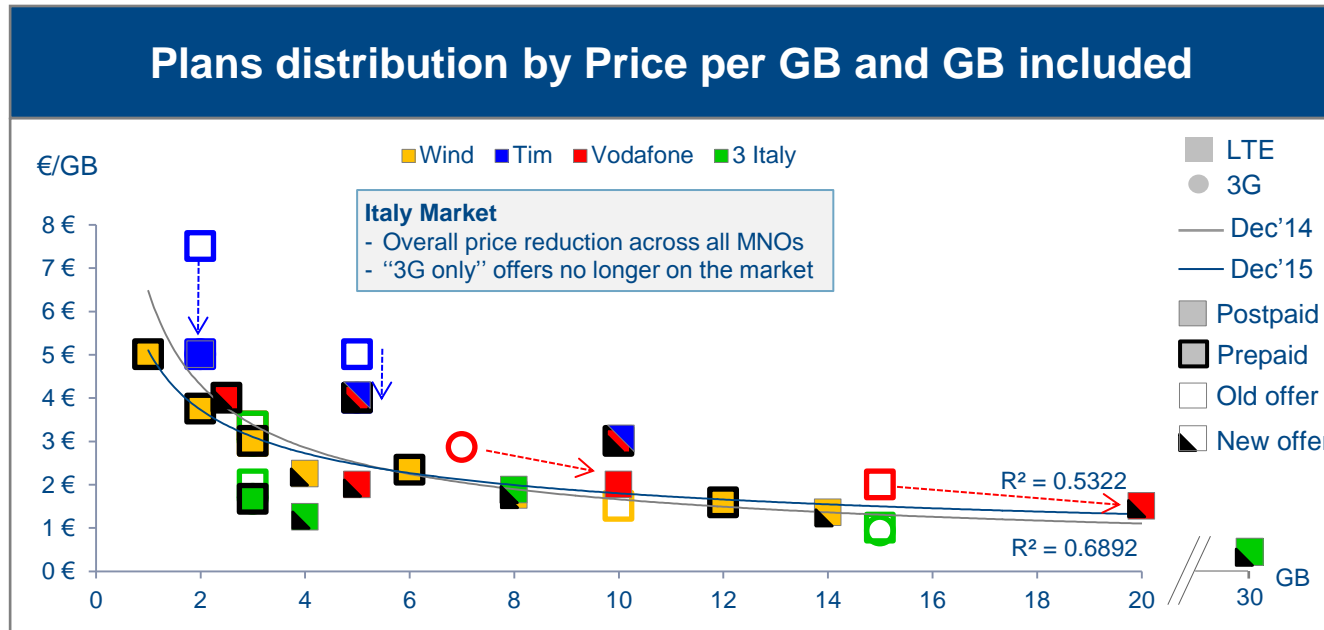


11% '14 12% '15

Price leadership strategy based on:

- More GB for price offers (below market average tariffs)
- Entertainment products: Grande Cinema 3 (1 cinema ticket per week)
- Abroad Data: navigation at same national tariff (+ connection fee) in selected abroad countries (Sister companies' countries)
- "Free to explore" option with unlimited data available at 40€ per month
- Only MNO offering time-based tariffs

DATA PLANS: Price per GB analysis



Operator	<= 2 GB Plans			
	2H13	2H14	2H15	
TIM	4G 7.5	7.5	5.0	
	3G 5.0	5.0		
Vodafone	4G			
	3G			
WIND	4G	4.4	4.4	
	3G 5.0			
3	4G			
	3G			
Average	4G 7.5	5.4	4.6	
	3G 5.0	5.0		

Operator	2-5 GB Plans			
	2H13	2H14	2H15	
TIM	4G 5.0	5.0	4.0	
	3G 4.0	4.0		
Vodafone	4G	3.3	3.3	
	3G			
WIND	4G	3.0	2.6	
	3G 3.0			
3	4G 2.7	2.7	1.5	
	3G 2.3	2.3		
Average	4G 3.4	3.3	2.8	
	3G 2.9	2.9		

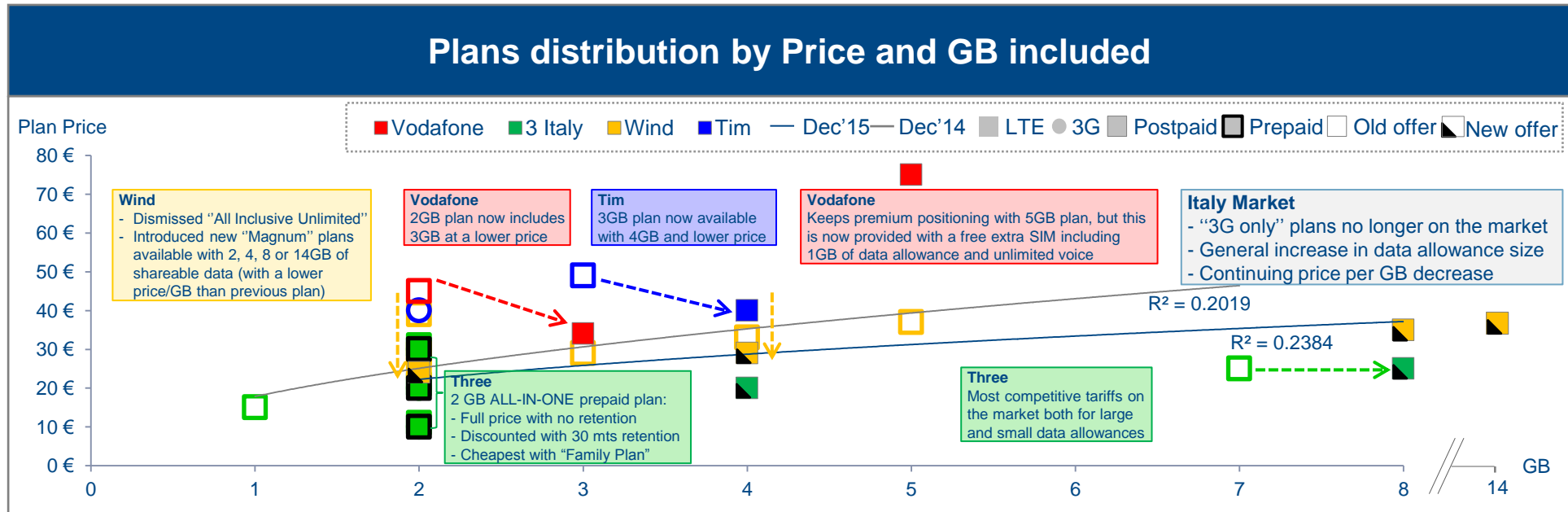
Operator	5-10 GB Plans			
	2H13	2H14	2H15	
TIM	4G 3.0	3.0	3.0	
	3G 2.5			
Vodafone	4G		2.5	
	3G 2.9	2.9		
WIND	4G	1.9	2.0	
	3G 1.5			
3	4G		1.9	
	3G			
Average	4G 3.0	2.3	2.3	
	3G 2.3	2.9		

Operator	> 10 GB Plans			
	2H13	2H14	2H15	
TIM	4G 2.3			
	3G			
Vodafone	4G 2.3	2.0	1.5	
	3G			
WIND	4G	1.6	1.5	
	3G			
3	4G 0.8	0.8	0.7	
	3G 0.8	0.8		
Average	4G 1.6	1.3	1.3	
	3G 0.8	0.8		

Sample: 3 ITA, Vodafone, TIM, Wind
 *Source: Merrill Lynch Global Wireless Matrix



VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



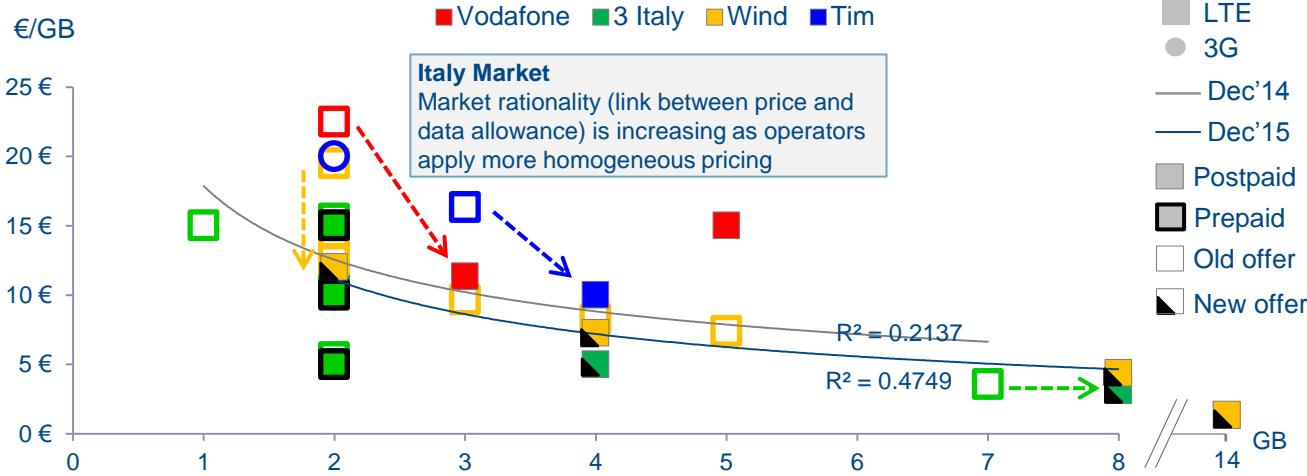
Strategy outline

<p>35% '14 34% '15</p> <p>Premium price strategy with only 1 unlimited voice and SMS plan:</p> <ul style="list-style-type: none"> ▪ 4G with top tariff (4GB/month): <ul style="list-style-type: none"> - 250 min per month towards EU and USA - From EU and USA: 500 voice minutes, 500 SMS, 500MB per month - 10GB Cloud storage ▪ Discontinued Tim Special Unlimited plan ▪ Additional monthly data available with "Opzione Internet Extra" 	<p>29% '14 29% '15</p> <p>Premium strategy with 12 months retention:</p> <ul style="list-style-type: none"> ▪ Top Tariff (free calls, SMS and data when abroad, minutes and SMS towards EU) now includes free extra SIM with 1GB of data allowance and unlimited voice minutes ▪ No prepaid tariffs with unlimited minutes ▪ Reposition 2GB 45€ plan to 34€ 3GB ▪ Entertainment Contents (6 months trial): Spotify, Infinity, Vodafone Calcio, as a mean to stimulate the premium network experience ▪ Data security service (1 year) 	<p>25% '14 25% '15</p> <p>Innovative and value for price strategy for Unlimited voice / SMS:</p> <ul style="list-style-type: none"> ▪ Offer simplification: customizable plans – all inclusive digital – were discontinued ▪ Postpaid plan with data shareable on multiple devices - Wind magnum - available with 2, 4, 8 or 14GB data allowances ▪ Digital Home & Life products with monthly surcharge: Smartwatch, Wellness, Music, Smart Home ▪ One offer with limited voice (150 minutes/m, 300 SMS, 2GB; 12 Euro/m) focuses on unlimited music services (Napster) 	<p>11% '14 12% '15</p> <p>Value for price strategy</p> <ul style="list-style-type: none"> ▪ 2 postpaid plans with 12 months retention and increased allowances (1 GB to 4 GB and 7 GB to 8 GB, respectively) including calls to and from several countries ▪ Prepaid 2GB plan: 30 €/m with no retention/ 20 €/m with 30 months retention/ 10€/m if additional SIM with family Program ▪ Cinema tickets (pay 1 x 2 tickets) ▪ All-in 800 extra, unreported prepaid, has an innovative retention system as the 800 min and SMS included double every 6 months
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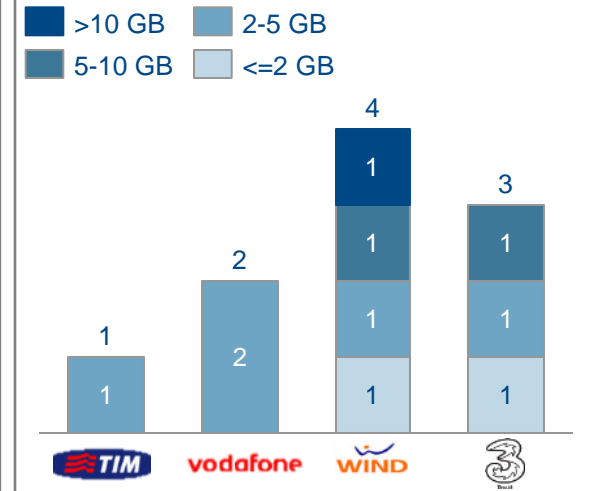
Sample: 3 ITA, Vodafone, TIM, Wind
*Source: Merrill Lynch Global Wireless Matrix

VOICE + DATA PLANS: Price per GB analysis

Plans distribution by Price per GB and GB included



Analyzed Plans All LTE Plans



Euro/GB

		<= 2 GB Plans		
Operator		2H13	2H14	2H15
TIM	4G			
	3G	20.0	20.0	
vodafone	4G		22.5	
	3G	30.8		
WIND	4G		15.5	12.0
	3G	21.0		
3	4G		15.3	15.0
	3G		15.0	
Average	4G		16.6	13.5
	3G	24.1	17.5	

		2-5 GB Plans		
Operator		2H13	2H14	2H15
TIM	4G	16.7	16.3	10.0
	3G			
vodafone	4G	15.0	15.0	13.2
	3G			
WIND	4G		8.4	7.3
	3G			
3	4G			5.0
	3G			
Average	4G	15.8	11.3	9.7
	3G			

		5-10 GB Plans		
Operator		2H13	2H14	2H15
TIM	4G			
	3G			
vodafone	4G			
	3G			
WIND	4G			4.4
	3G			
3	4G		3.6	3.1
	3G			
Average	4G		3.6	3.8
	3G			

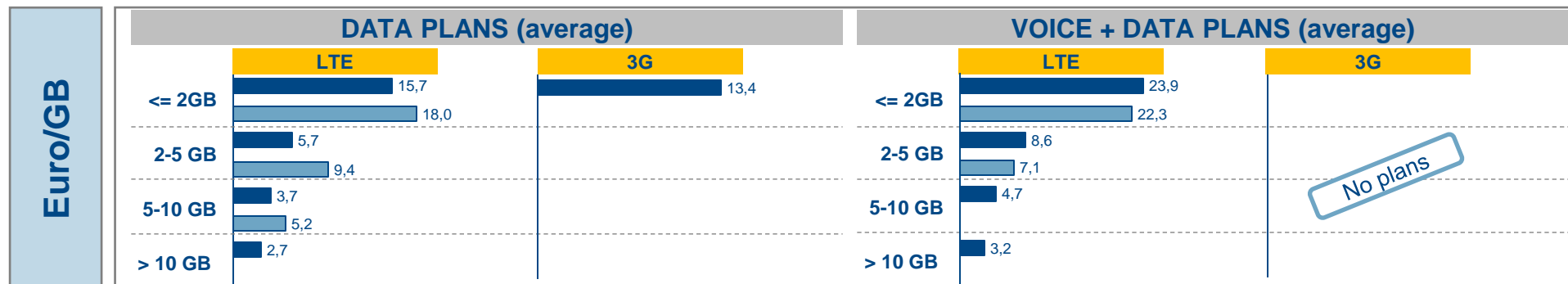
		> 10 GB Plans		
Operator		2H13	2H14	2H15
TIM	4G			
	3G			
vodafone	4G			
	3G			
WIND	4G			2.9
	3G			
3	4G	1.6		
	3G	1.5		
Average	4G	1.6		2.9
	3G	1.5		

Sample: 3 ITA, Vodafone, TIM, Wind
 *Source: Merrill Lynch Global Wireless Matrix

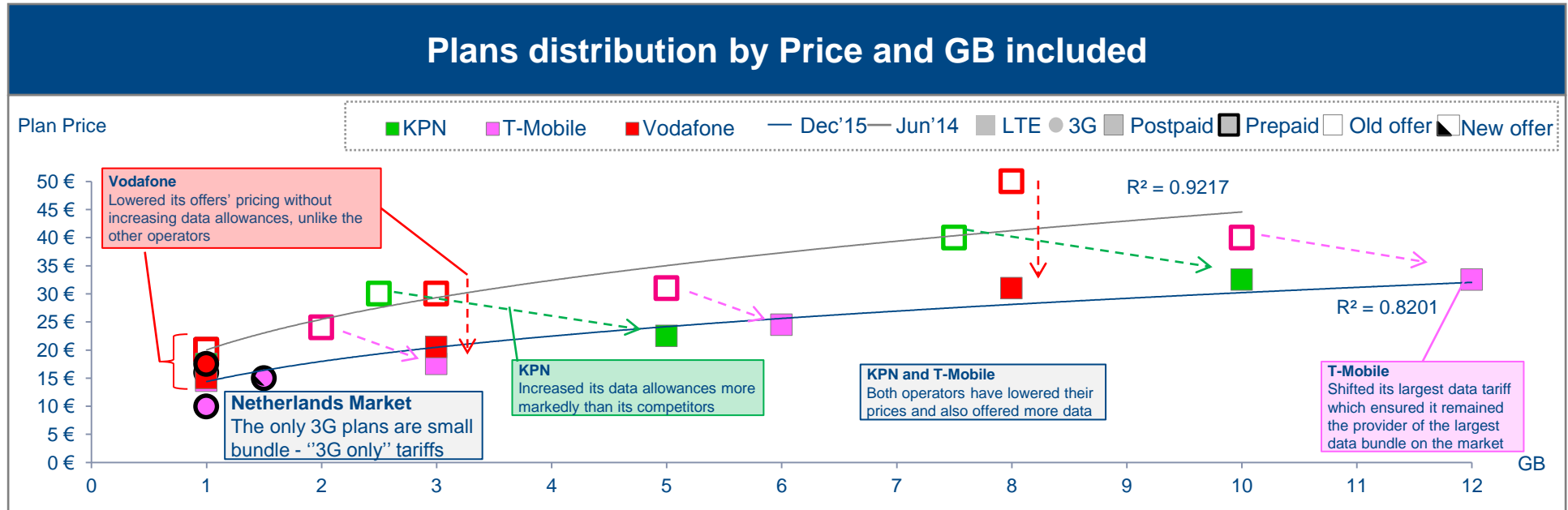
COUNTRY SUMMARY: main indicators of the country



- Reached 100% in both mobile broadband penetration (72% EU average at December 2014) and LTE coverage (79% EU avg.)
- “3G only” tariffs have mostly been replaced with LTE ones by MNOs, and are now only offered through B-brands and by MVNOs
- Prices have significantly decreased over the past year in parallel with an increase in data allowance by operators. This was more pronounced in the “data only” than in the “voice + data” market.
- Tele2 recently became an MNO and operates through aggressive pricing. KPN, T-Mobile and Vodafone are the incumbents.
- KPN provides the most attractive Value Added Services (Entertainment, Spotify, WiFi hotspots, etc.) whereas, at the other end, Tele2 includes very limited value added services within its offer



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

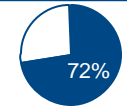
<p>41% '14, 42% '15</p> <p>Market average prices based on:</p> <ul style="list-style-type: none"> One prepaid 3G data tariff at a market average price Spread of postpaid 4G data bundles Significant movement in data allowances for its bundles Value added services: <ul style="list-style-type: none"> Free access to KPN WIFI hotspots Extra value (discounts and service) for quad-play and household customers 	<p>31% '14, 30% '15</p> <p>Competitive price strategy based on:</p> <ul style="list-style-type: none"> Premium prices for its 3G & 4G tariffs Offers are generally concentrated towards the lower end of data bundle range Price evolution differs from the other operators by lowering prices but not increasing data allowance Limited value added services except for free customer service 	<p>23% '14, 22% '15</p> <p>Value for price strategy based on:</p> <ul style="list-style-type: none"> The widest choice of "data only" tariffs available in the Netherlands Price leader on its two 3G tariffs and three 4G tariffs Shifted its tariffs which ensured it was not in the same GB range as KPN The 3G tariffs offer free 250MB of data for every top-up 	<p>5% '14, 6% '15</p> <p>No data only tariffs available</p>
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Sample: KPN, Vodafone, T-Mobile, Tele2
* Source: ...





-15.29

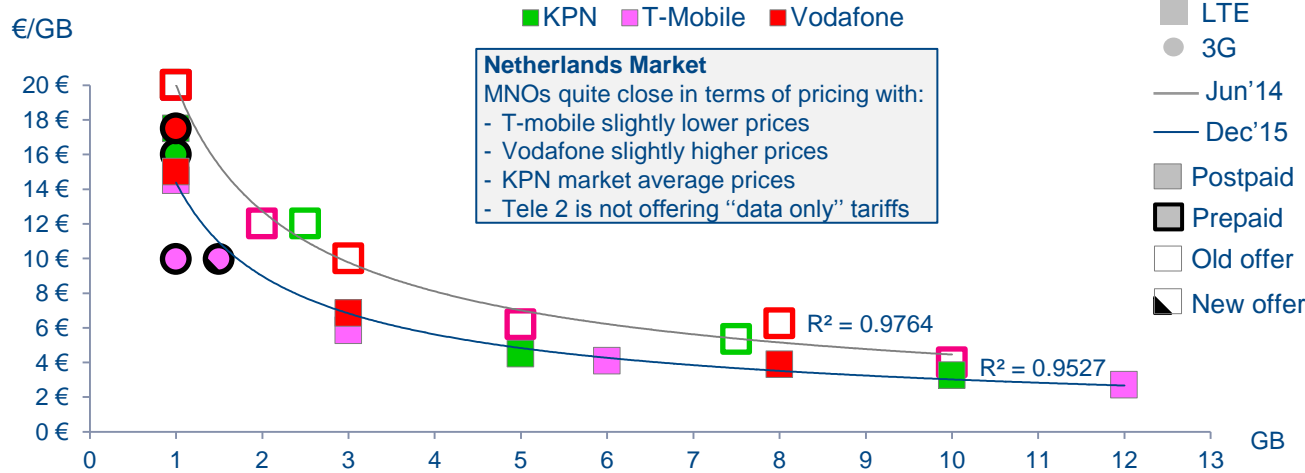


100%

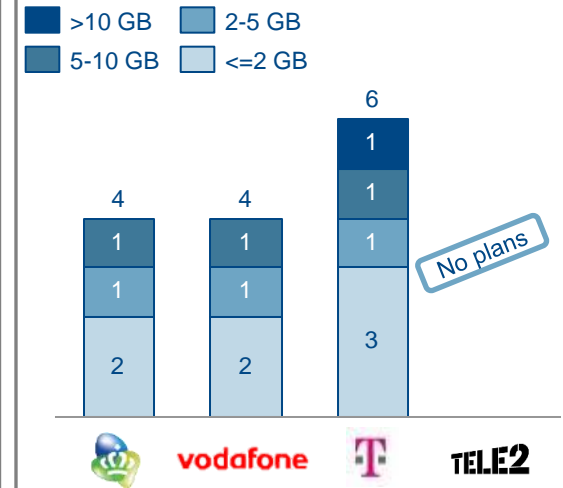


DATA PLANS: Price per GB analysis

Plans distribution by Price per GB and GB included



Analyzed Plans



Euro/GB

		<= 2 GB Plans	
Operator		1H14	2H15
KPN	4G	20.0	17.5
	3G		16.0
Vodafone	4G	20.0	15.0
	3G		17.5
T-Mobile	4G	16.0	14.5
	3G		10.0
TELE2	4G		
	3G		
Average	4G	18.0	15.7
	3G		13.4

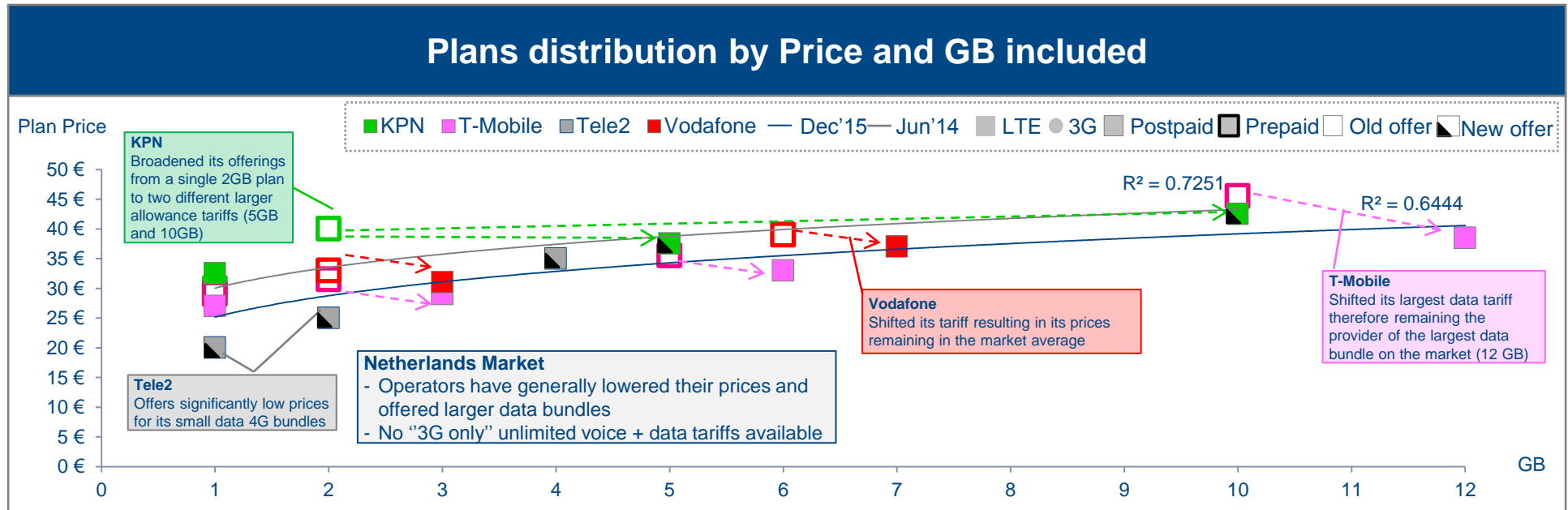
		2-5 GB Plans	
Operator		1H14	2H15
KPN	4G	12.0	4.5
	3G		
Vodafone	4G	10.0	6.8
	3G		
T-Mobile	4G	6.2	5.8
	3G		
TELE2	4G		
	3G		
Average	4G	9.4	5.7
	3G		

		5-10 GB Plans	
Operator		1H14	2H15
KPN	4G	5.3	3.3
	3G		
Vodafone	4G	6.3	3.9
	3G		
T-Mobile	4G	4.0	4.1
	3G		
TELE2	4G		
	3G		
Average	4G	5.2	3.7
	3G		

		> 10 GB Plans	
Operator		1H14	2H15
KPN	4G		
	3G		
Vodafone	4G		
	3G		
T-Mobile	4G		2.7
	3G		
TELE2	4G		
	3G		
Average	4G		2.7
	3G		

Sample: KPN, Vodafone, T-Mobile, Tele2

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

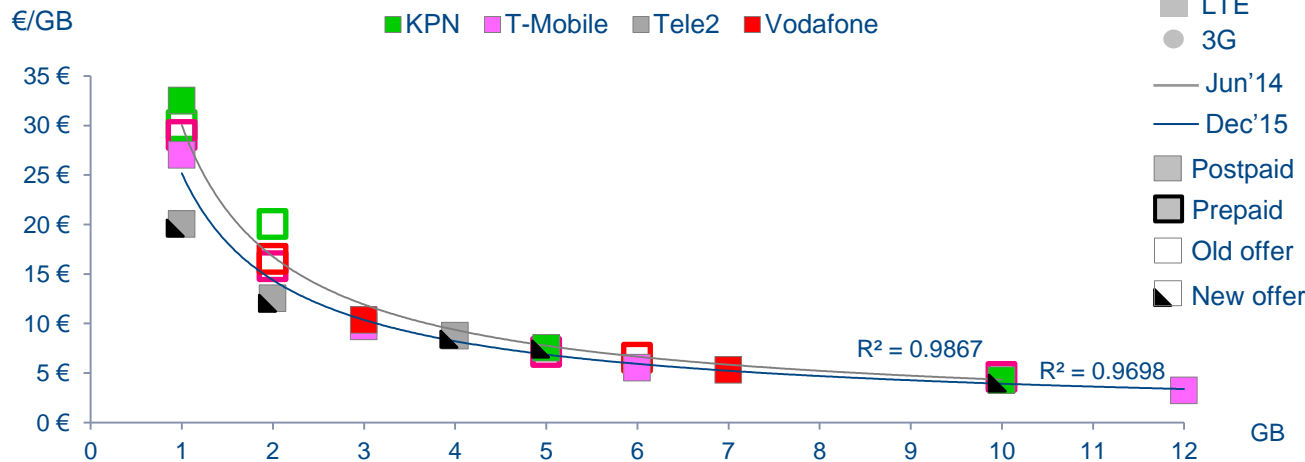
<p>kpn</p> <p>41% '14 42% '15</p> <p>Premium price strategy based on:</p> <ul style="list-style-type: none"> Three 4G tariffs spread across the range of GB bundles 2GB plan discontinued and replaced by 5GB and 10GB offerings All tariffs offer free access to KPN WIFI hotspots & access to entertainment 10GB plan includes free Spotify premium Extra value (discounts and service) for quad-play and household customers 	<p>vodafone</p> <p>31% '14 30% '15</p> <p>Market average prices based on:</p> <ul style="list-style-type: none"> Two middle of data range tariffs Both available at a discounted price including a larger data allowance than in the past 3GB tariff offered at a premium with respect to T-Mobile's 3GB tariff 7GB tariff offers a free multi-sim 	<p>T-Mobile</p> <p>23% '14 22% '15</p> <p>Value for price strategy based on:</p> <ul style="list-style-type: none"> The widest choice of tariffs available on the unlimited voice + data market Three out of its four tariffs are below the market average price Now has the largest data bundle available Offers voice share plans for an additional €7.50 a month 	<p>TELE2</p> <p>5% '14 6% '15</p> <p>No frills price leadership based on:</p> <ul style="list-style-type: none"> Three 4G tariffs targeting customers who seek low data bundles Consistently the lowest price in each of its GB ranges No plans offered over 4GB No value added services offered with their tariffs
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Sample: KPN, Vodafone, T-Mobile, Tele2

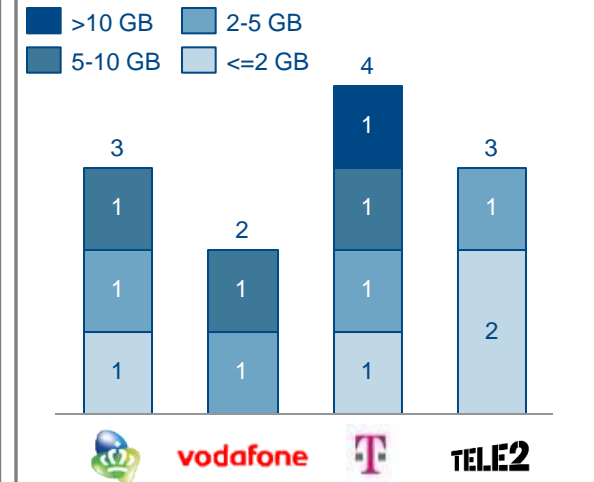


VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis

Plans distribution by Price per GB and GB included



Analyzed Plans



Euro/GB

		<= 2 GB Plans	
Operator		1H14	2H15
KPN	4G	25.0	30.0
	3G		
Vodafone	4G	16.5	
	3G		
T-Mobile	4G	22.4	27.0
	3G		
TELE2	4G		16.3
	3G		
Average	4G	22.3	23.9
	3G		

		2-5 GB Plans	
Operator		1H14	2H15
KPN	4G		7.0
	3G		
Vodafone	4G		10.3
	3G		
T-Mobile	4G	7.1	9.7
	3G		
TELE2	4G		8.8
	3G		
Average	4G	7.1	8.6
	3G		

		5-10 GB Plans	
Operator		1H14	2H15
KPN	4G		4.0
	3G		
Vodafone	4G	6.5	5.3
	3G		
T-Mobile	4G	4.6	5.5
	3G		
TELE2	4G		
	3G		
Average	4G		4.7
	3G		

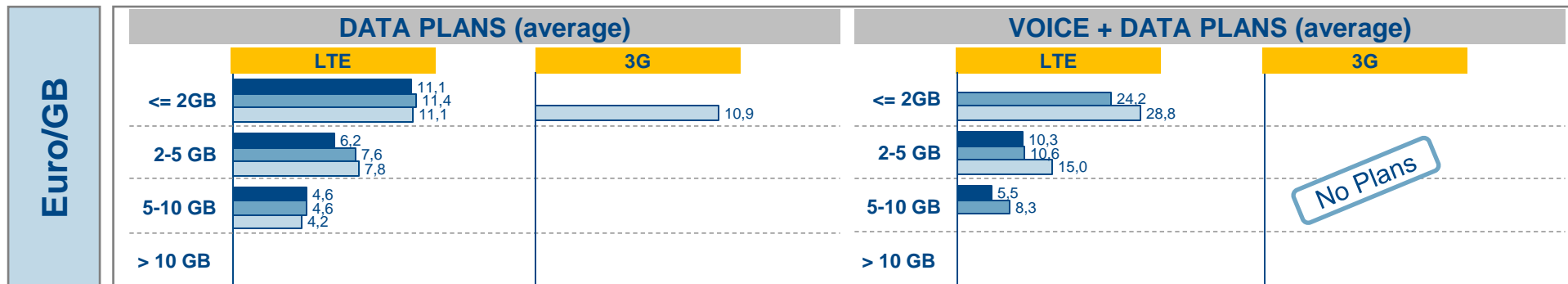
		> 10 GB Plans	
Operator		1H14	2H15
KPN	4G		
	3G		
Vodafone	4G		
	3G		
T-Mobile	4G		3.2
	3G		
TELE2	4G		
	3G		
Average	4G		3.2
	3G		

Sample: KPN, Vodafone, T-Mobile, Tele2

COUNTRY SUMMARY: main indicators of the country



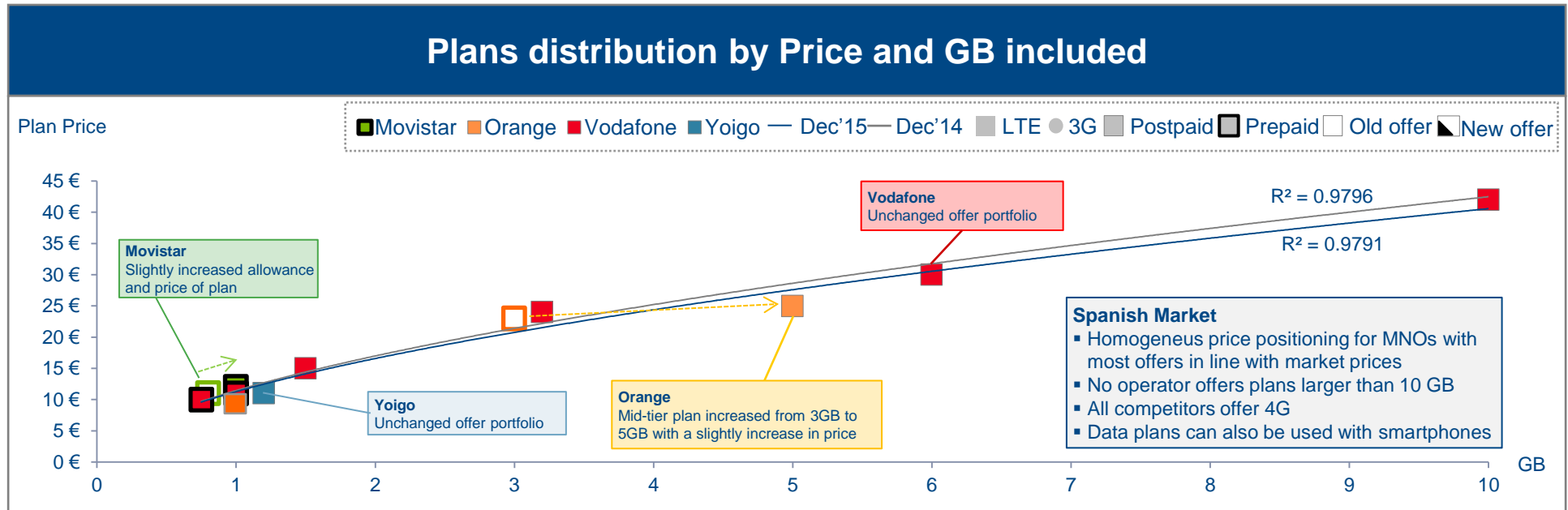
- Both LTE coverage (76%) and mobile broadband penetration (77%) are in line with EU average (79% and 72% respectively as of December 2014)
- The market keeps trending towards a generalized increase in the size of data allowances, paired with an increase in prices, with the exception of Yoigo that employs an aggressive low-price strategy
- Vodafone is positioned as a premium player whose offering covers all user profiles, from light to heavy users
- In stand-alone mobile price plans, all competitors, except Yoigo, have started to use value added services (cloud, content) as differentiator; roaming starts to be a factor in high-end price plans



Source: Merrill Lynch Global Wireless Matrix, Arthur D. Little Analysis

■ 2H15 ■ 2H14 ■ 2H13

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



Simple offer with a prepaid data plan

- Offer overlapping with Vodafone and Orange in the light users segment (1 GB plans)
- Only operator low performance 4G at 7.2 Mbps
- No additional services



Complete range of price plans

- Operator offering widest portfolio covering light to heavy users
- 1 GB plan overlapping with Movistar and Orange plans but higher speed offered
- Offering all plans without engagement
- Some value added services included in the data tariffs (e.g. Dropbox)



Simple offer with two post-paid plans

- 2 post-paid data-only plans covering light and medium user profiles
- 1 GB plan offer overlapping with Movistar and Vodafone plans
- Increased data allowance for mid-tier plan
- No engagement required if SIM-only
- No additional services



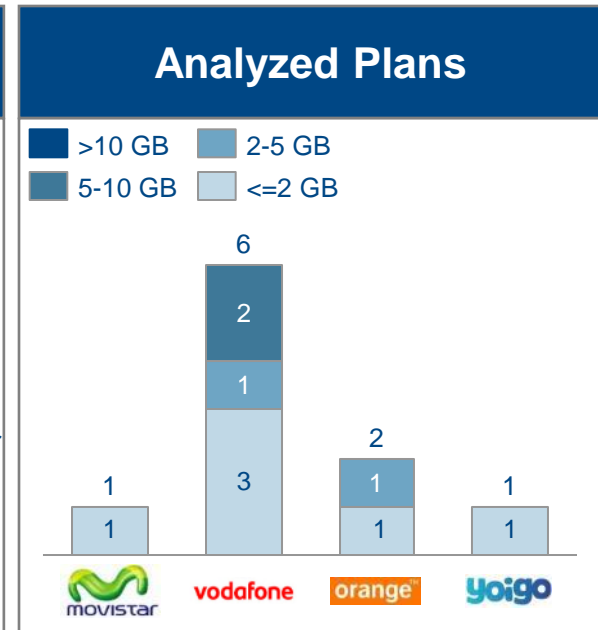
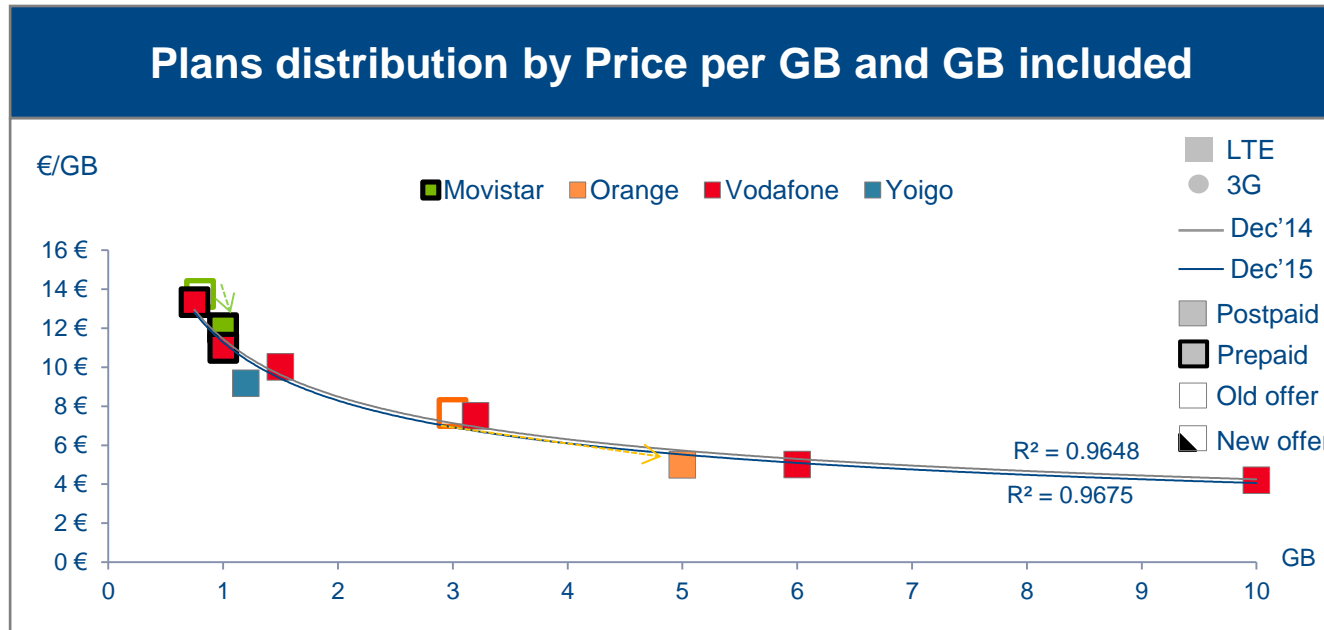
Simple offer with only one post-paid plan

- Single post-paid data-only plan for the light user profiles
- No changes in portfolio compared to last year
- No engagement required if SIM-only
- No additional services

Sample: Orange, Movistar, Vodafone, Yoigo



DATA PLANS: Price per GB analysis

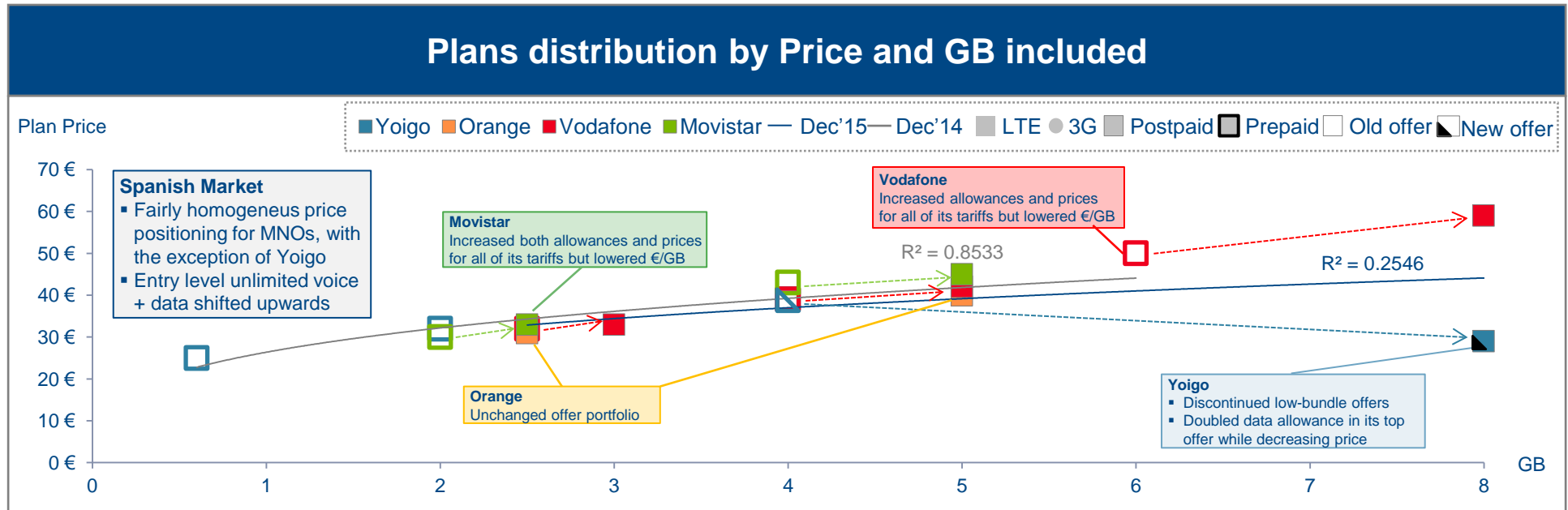


Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Movistar	4G		13.8	12.0	4G				4G				4G			
	3G				3G				3G				3G			
Vodafone	4G	11.0	11.4	11.4	4G	7.8	7.5	7.5	4G	4.2	4.6	4.6	4G			
	3G				3G				3G				3G			
Orange	4G	11.5	10.9	10.9	4G		7.7	5.0	4G	4.2			4G			
	3G	10.9			3G				3G				3G			
Yoigo	4G	10.9	9.2	9.2	4G				4G				4G			
	3G				3G				3G				3G			
Average	4G	11.1	11.4	11.1	4G	7.8	7.6	6.2	4G	4.2	4.6	4.6	4G			
	3G	10.9			3G				3G				3G			

No Plans

Sample: Orange, Movistar, Vodafone, Yoigo

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



34% '14 32% '15

Slightly premium priced offering

- Prices and data allowances slightly increased
- 2 mobile-only price plans
- Value added services** with a focus on **TV included** in all convergent packs
- Focus on "Fusion" convergence offers paired with Aggressive FTTH roll-out



29% '14 29% '15

In line with market with widest offering in terms of data allowances

- Prices and data allowances slightly increased
- EU-roaming allowance included** in high priced tariffs
- Value added services** like Napster, Yomvi (Canal+) and Dropbox included
- Focus on "Fusion" convergence offers paired with Aggressive FTTH roll-out



24% '14 25% '15

Slight price leadership on mid-range bundles

- Price points slightly below Movistar and Vodafone
- Similar to Vodafone, **EU-roaming allowance included** in high priced tariffs
- Value added services** like free Orange Cloud (25 GB)
- Focus on "Fusion" convergence offers paired with Aggressive FTTH roll-out

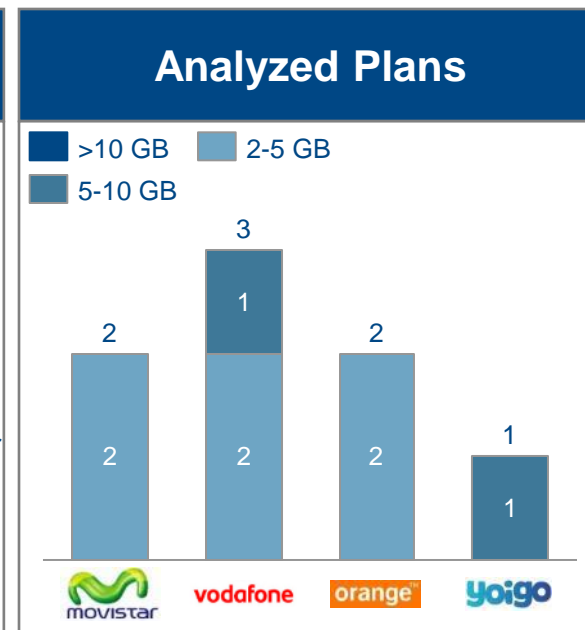
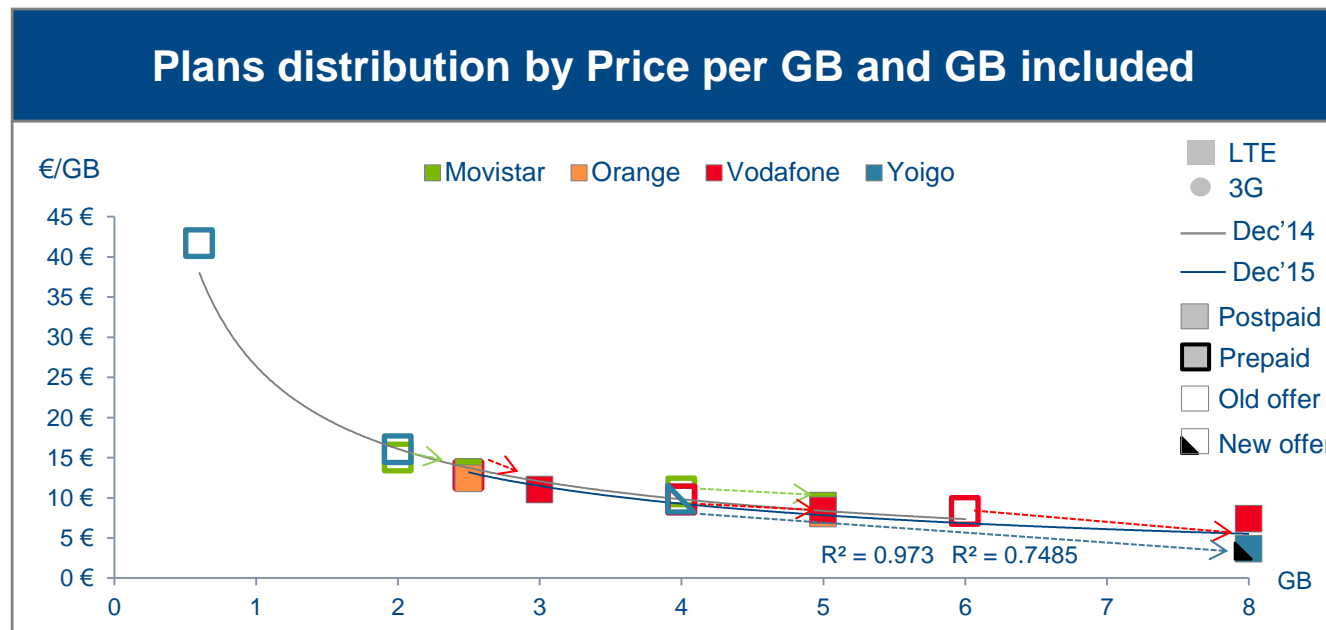


7% '14 7% '15

Aggressive strategy with unique plan offering the largest data allowance at the lowest price

- Offering the lowest price, far below market-average
- 10 GB plan** offer like Vodafone most expensive plan but **half the price**
- No frills operator **not offering any additional service**

VOICE + DATA PLANS: Price per GB analysis



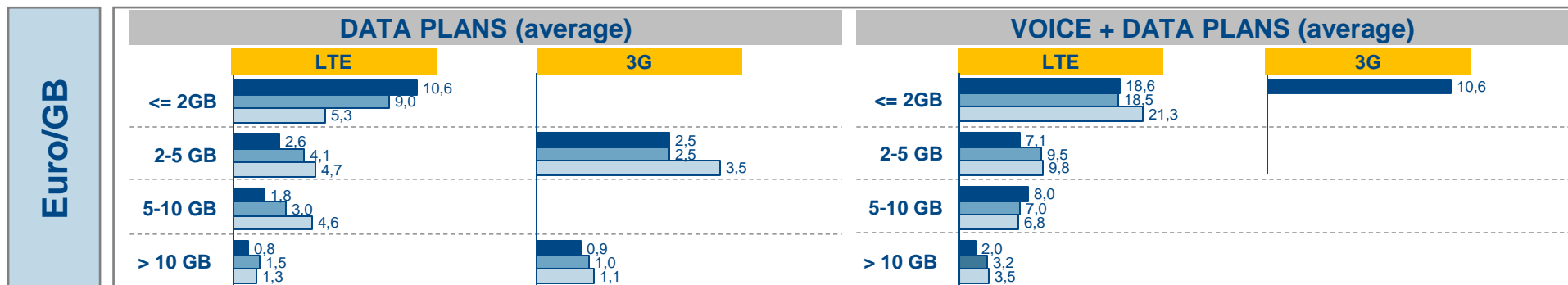
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Movistar	4G	28.2	15.0		4G		10.8	11.1	4G				4G			
	3G				3G				3G				3G			
Vodafone	4G	33.7			4G	15.0	11.3	9.7	4G		8.3	7.4	4G			
	3G				3G				3G				3G			
Orange	4G	21.2			4G		10.2	10.2	4G				4G			
	3G				3G				3G				3G			
Yoigo	4G	25.5	28.8		4G		9.8		4G			3.6	4G			
	3G				3G				3G				3G			
Average	4G	28.8	24.2		4G	15.0	10.6	10.3	4G		8.3	5.5	4G			
	3G				3G				3G				3G			

Sample: Orange, Movistar, Vodafone, Yoigo

COUNTRY SUMMARY: main indicators of the country

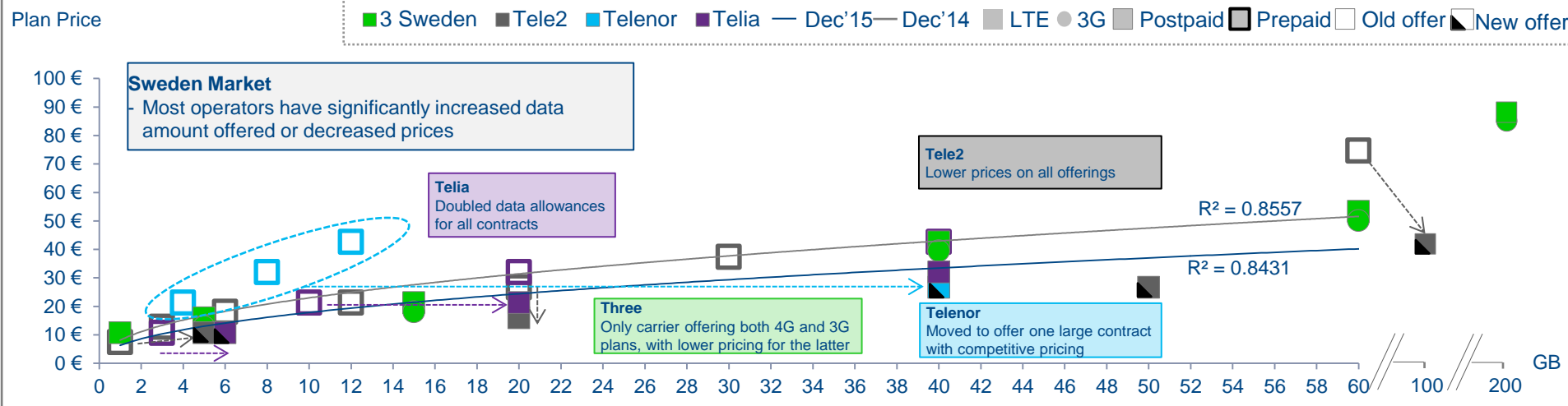


- Sweden is a front runner as regards to mobile broadband penetration (113%) and LTE coverage (99%)
- The market experiences decreases in plans or significant increases in data allowance for the same price
- Market leaders' strategies: Tele2 is positioned as price leader and has further lowered prices, Telia applies mid-to-high prices on all its offers and has doubled data allowances, supported by a high quality network and a range of VAS for its smartphone plans
- The two smaller players (Three and Telenor) also possess a reliable LTE network, and apply mid-to-high tariffs
- Value added services, Telia offers Spotify subscriptions with contracts, Tele2 offers Viaplay, 3 offers free data for music streaming
- Telia has entered strategic partnership with Spotify and also bought shares of Spotify



DATA PLANS: Strategy, prices and GB included in the offers analysis

Plans distribution by Price and GB included



Strategy outline



43% '14 43% '15

Competitive Price Strategy:

- No retention SIM Only offers shown (30 days contract)
- Pricing in line with market average
- Doubled data allowances for all contracts compared to 2014
- Value added services by offering Spotify, F-secure SAFE and Play+
- Bonus data for larger bundle contracts



26% '14 25% '15

Value for Money Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Completely redefined offering
- Price decreases or data allowance increases for all offerings
- Price Leader across all offerings
- Value added services by offering Viaplay and HBO Nordic



18% '14 17% '15

Value for Money Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Now offering one larger data allowance at a more competitive price instead of 3 smaller bundles at non-competitive prices
- Value added services by offering Cloud Storage and WyWallet

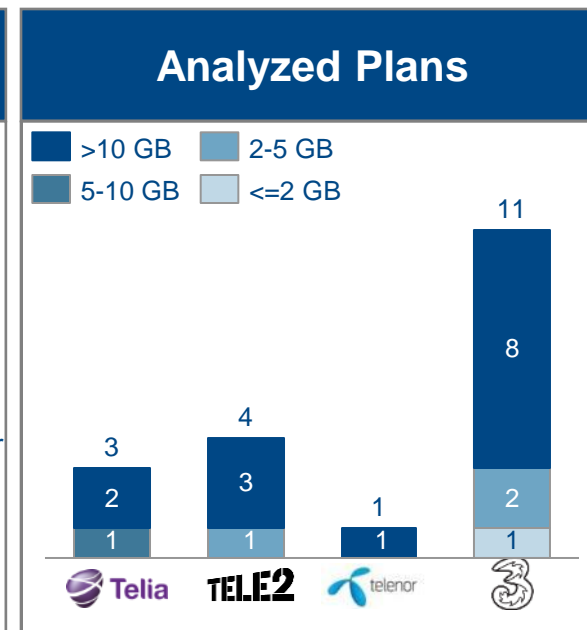
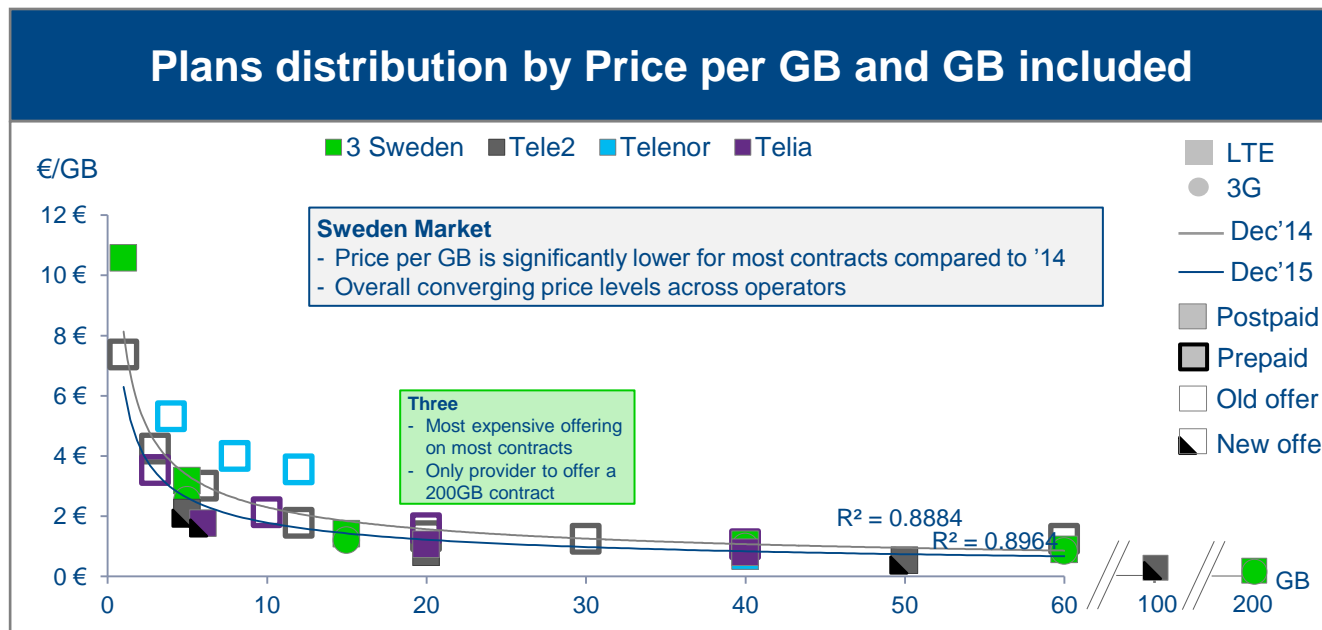


13% '14 14% '15

Premium Price Strategy Market Leader

- No retention SIM Only offers shown (30 days contract)
- Higher prices or lower data volumes on all contracts (except the 200GB which nobody else offers)
- Only provider to offer both 4G and 3G contracts with the latter being slightly less expensive
- Value added services by offering Mofibo, Viaplay and Deezer

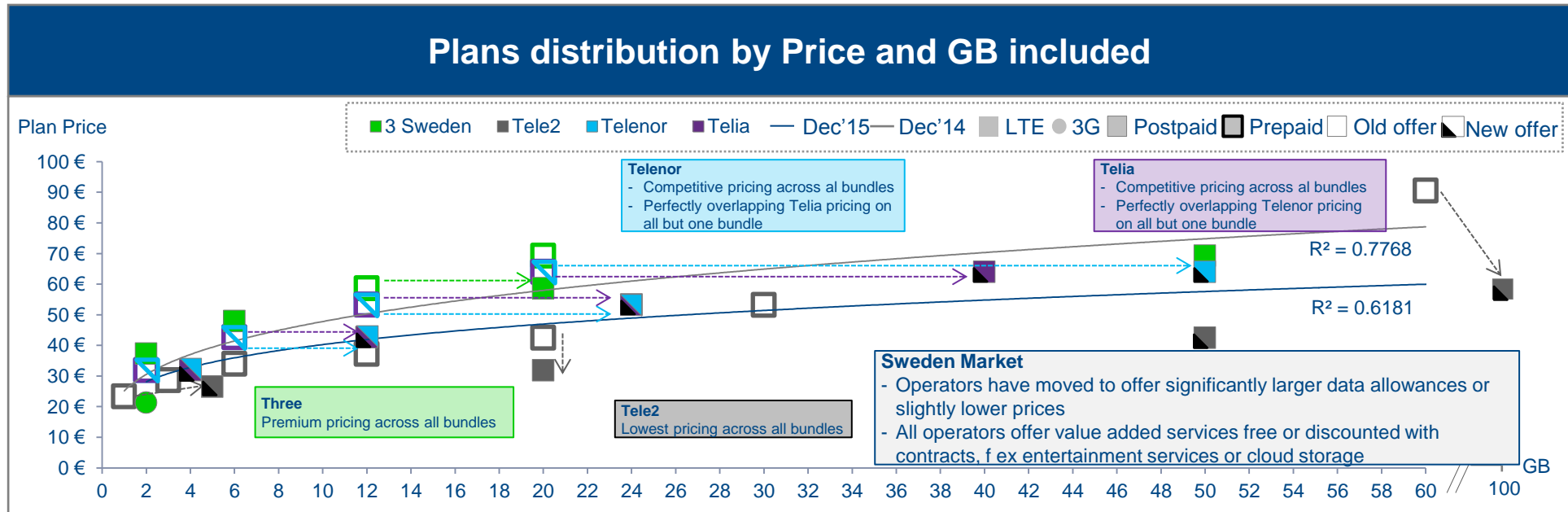
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Telia	4G	5.3			4G	5.3	3.5		4G	4.7	2.1	1.8	4G		1.3	0.9
	3G				3G				3G				3G			
TELE2	4G		7.4		4G		4.2	2.1	4G		3.0		4G	0.7	1.4	0.6
	3G				3G	3.5			3G				3G	1.1		
telenor	4G				4G	5.3	5.3		4G	4.0	4.0		4G	3.5	3.5	0.7
	3G				3G				3G				3G			
3	4G		10.6	10.6	4G	3.5	3.2	3.2	4G				4G	0.7	1.1	1.0
	3G				3G		2.5	2.5	3G				3G		1.0	0.9
Average	4G	5.3	9.0	10.6	4G	4.7	4.1	2.6	4G	4.6	3.0	1.8	4G	1.3	1.5	0.8
	3G				3G	3.5	2.5	2.5	3G				3G	1.1	1.0	0.9

Sample: 3 Sweden, Tele2, Telenor, Telia

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



43% | 43%
'14 '15

Competitive Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Pricing in line with market average
- Doubled data allowances for all contracts compared to 2014
- Telia and Telenor overlapping on most bundles
- Value added services by offering Spotify, F-secure SAFE and Play+
- Discounted deals for families
- Discounted devices for longer contracts



26% | 25%
'14 '15

Value for Money Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Completely redefined offering
- Price decreases or data allowance increases for all offerings
- Price Leader across all offerings
- Value added services by offering Viaplay and HBO Nordic
- Offer customers opportunity to trade in phones after 6-24 months for upgrades



18% | 17%
'14 '15

Competitive Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Pricing in line with market average
- Significantly increased data allowances for all contracts
- Telia and Telenor overlapping on most bundles
- Value added services by offering Cloud Storage and WyWallet

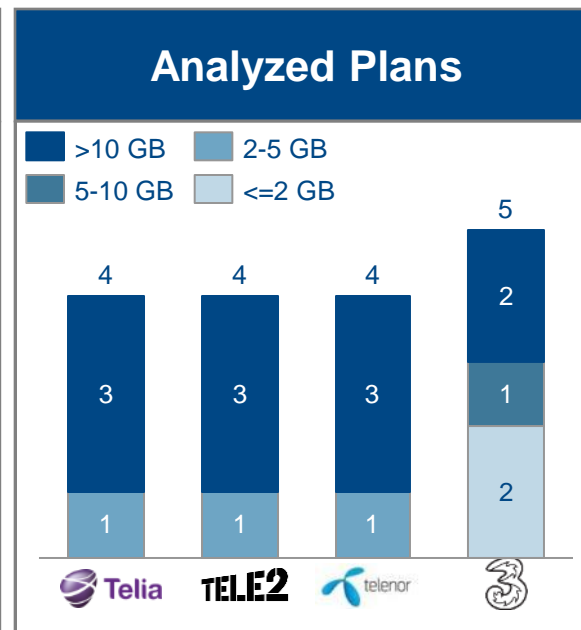
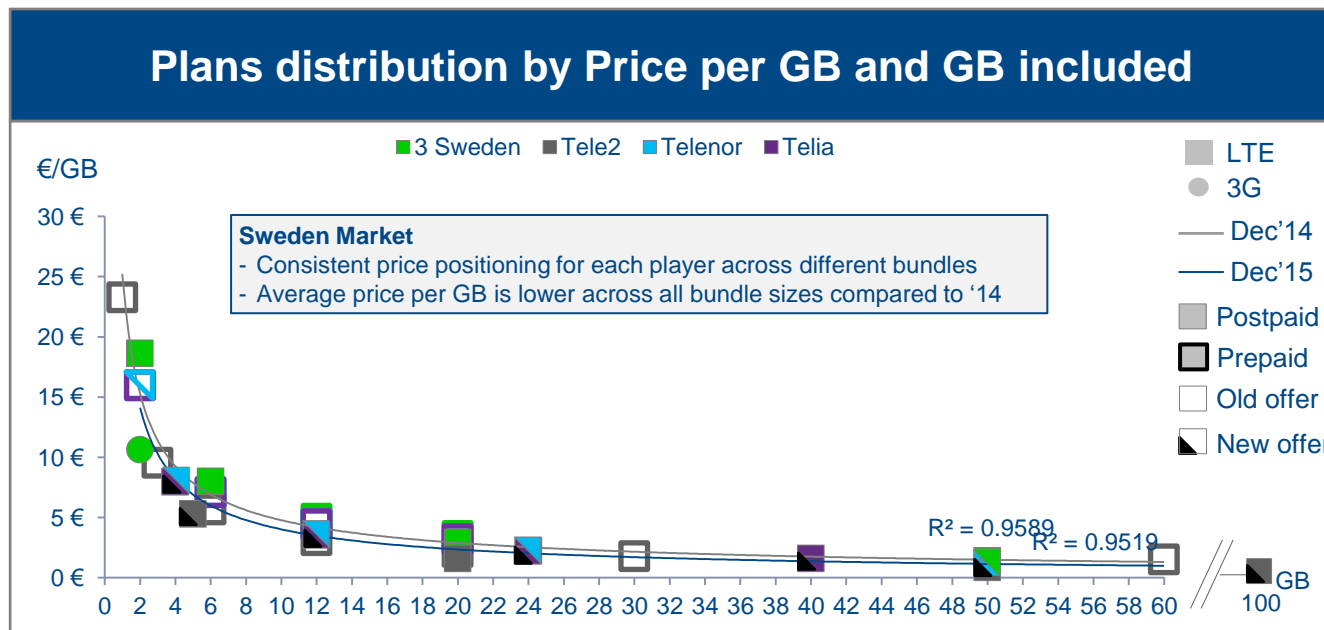


13% | 14%
'14 '15

Premium Price Strategy

- No retention SIM Only offers shown (30 days contract)
- Data allowance increases for most offerings while prices are not changed
- Only provider to offer both 4G and 3G contracts with the latter being slightly less expensive
- Value added services by offering Mofibo, Viaplay and Deezer

VOICE + DATA PLANS: Price per GB analysis



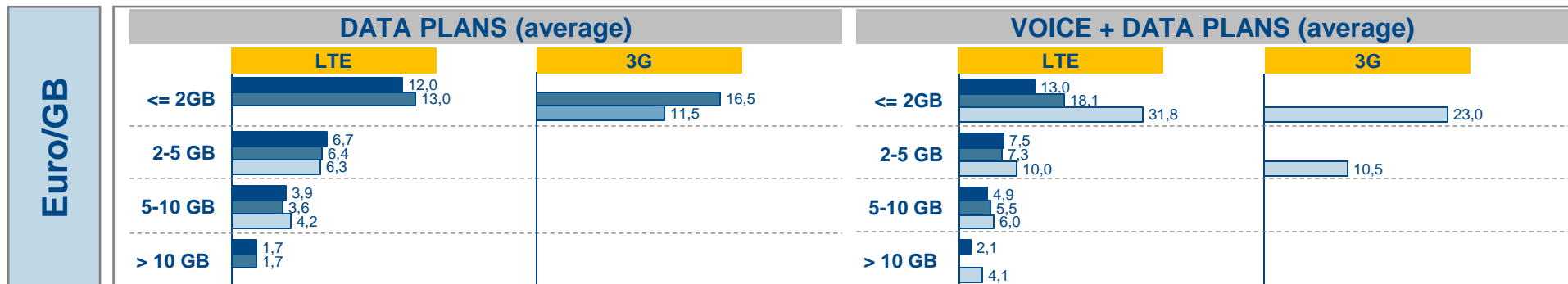
Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans			
	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15	Operator	2H13	2H14	2H15
Telia	4G	16.0	16.0		4G	10.6		8.0	4G	7.6	7.1		4G		3.8	2.5
	3G				3G				3G				3G			
TELE2	4G	21.3	23.3		4G	9.3	9.5	5.3	4G	5.9	5.7		4G		2.1	1.0
	3G				3G				3G				3G			
telenor	4G	16.0	16.0		4G	10.6		8.0	4G	7.6	7.1		4G		3.8	2.3
	3G				3G				3G				3G			
3	4G	31.9	18.6	18.6	4G	8.5			4G	5.3	8.0	8.0	4G	3.5	4.2	2.2
	3G			10.6	3G				3G				3G			
Average	4G	21.3	18.5	18.6	Average	9.8	9.5	7.1	Average	6.8	7.0	8.0	Average	3.5	3.2	2.0
	3G			10.6	3G				3G				3G			

Sample: 3 Sweden, Tele2, Telenor, Telia

COUNTRY SUMMARY: main indicators of the country



- The United Kingdom has a 88% mobile broadband take-up rate, considerably higher than the EU average (72% as of December 2014). LTE coverage of 84% is close to EU rates (79% as of 2014)
- There are no “3G only” tariffs available in the UK “data only” market and very few of those remaining in the “voice+data” market
- There is little price differentiation between operators across both the “voice + data” and “data only” markets
- A degree of differentiation can be found in value added services; O2 and Vodafone in particular are the most attractive (O2 priority moments application, Vodafone entertainment offerings)

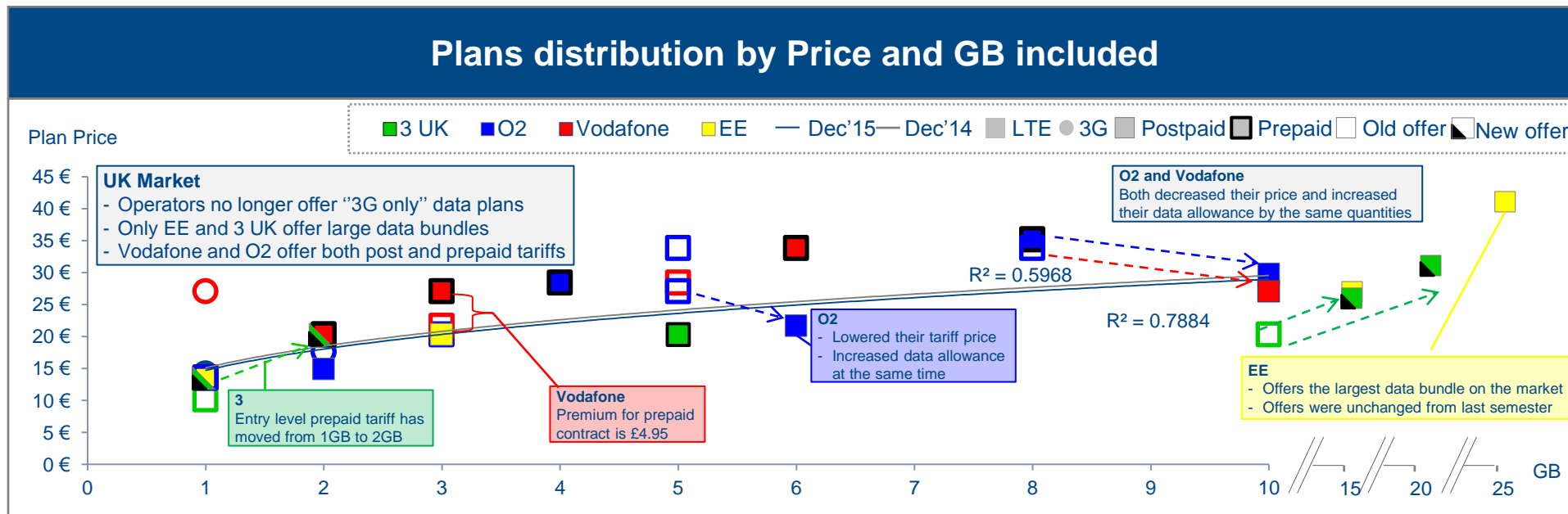


Source: Merrill Lynch Global Wireless Matrix, Arthur D. Little Analysis
Note: Exchange Rate Pound to Euro= 1,35 @ 30/09/2015

■ 2H15 ■ 2H14 ■ 2H13



DATA PLANS: Strategy, prices and GB included in the offers analysis



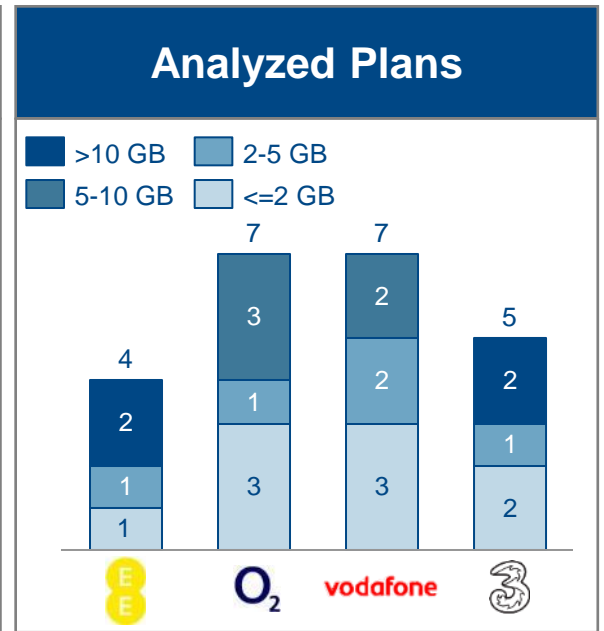
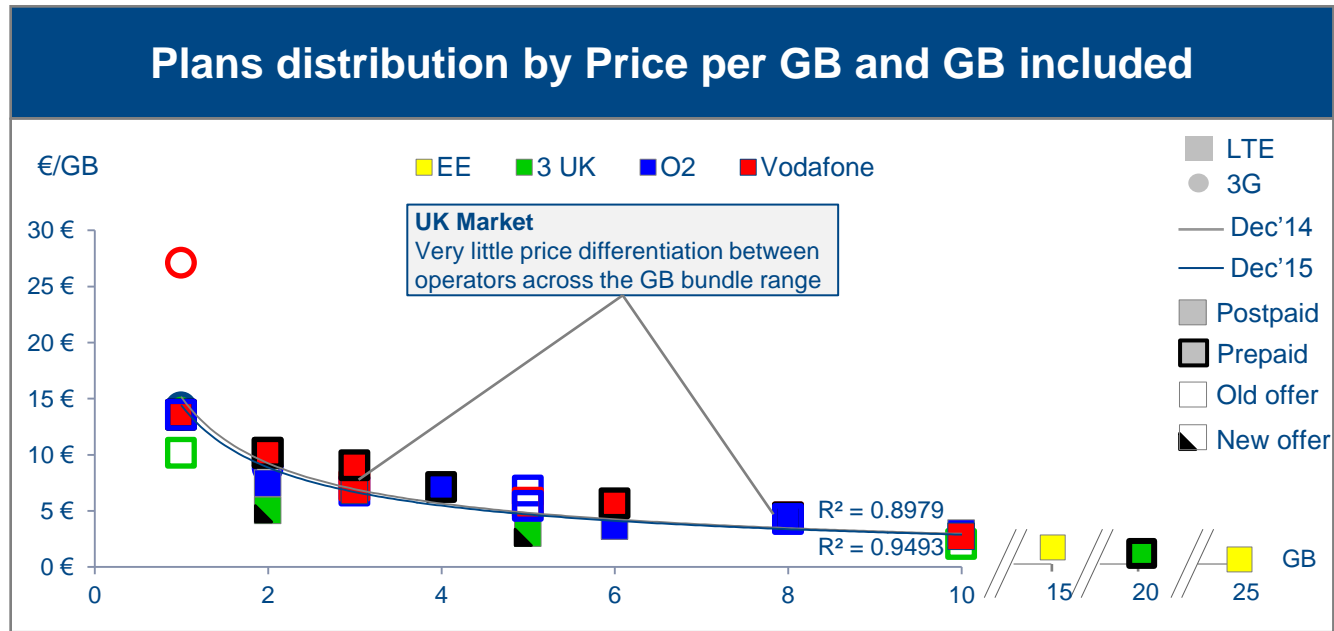
Strategy outline

<p>Market average prices based on:</p> <ul style="list-style-type: none"> Two low data offers and two high data offers Low data offers that match those of competitors tariffs at the same GB allowance Offering the largest data tariff available Access to free WIFI at London's tube stations 	<p>Competitive prices based on:</p> <ul style="list-style-type: none"> Prepaid tariffs exceeding the market average price Postpaid tariffs either beat or match the average market price Offers the greatest variety in GB bundles of any operators Share plans are available at £6 a month for each additional SIM O2 priority app provides a number of offers and discounts 	<p>Market average prices based on:</p> <ul style="list-style-type: none"> A similar strategy as that of O2 Postpaid tariffs, which match market average prices Three new prepaid tariffs introduced at the low-medium data allowance end Share plans available for £8 a month per SIM All data bundles smaller than 10GB 	<p>Price leadership strategy based on:</p> <ul style="list-style-type: none"> 1GB, 2GB and 15GB tariffs matching competitor's prices Two other tariffs (5GB and 20GB) offering unique data bundles Only prepaid tariff is a 1GB data bundle Offers free access to WIFI at London tube stations
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Sample: EE, O2, Vodafone, 3UK
Source: Merrill Lynch Global Wireless Matrix

MNO market share

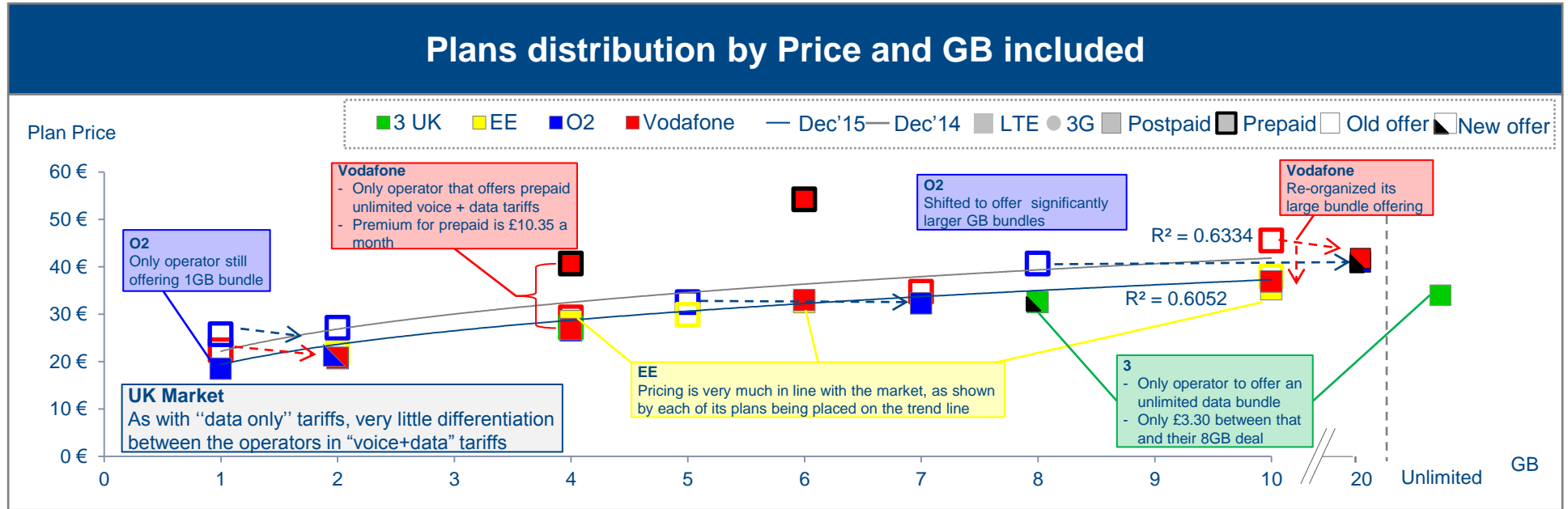
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
	EE	4G		13.5	13.5	EE	4G	6.5	6.8	6.8	EE	4G	4.4			EE	4G		1.7	1.7
	3G					3G					3G					3G				
O2	4G		13.5	10.4	O2	4G	6.8	6.3	7.1	O2	4G		4.2	3.7	O2	4G				
	3G	11.2	11.2			3G					3G					3G				
Vodafone	4G		13.5	12.4	Vodafone	4G	6.8	6.5	7.9	Vodafone	4G	4.1	4.4	4.2	Vodafone	4G				
	3G	11.8	27.1			3G					3G					3G				
3	4G		12.2	10.5	3	4G	4.3		4.1	3	4G		2.0		3	4G			1.7	
	3G					3G					3G					3G				
Average	4G		13.0	12.0	Average	4G	6.3	6.4	6.7	Average	4G	4.2	3.6	3.9	Average	4G		1.7	1.7	
	3G	11.5	16.5			3G					3G					3G				

Sample: EE, O2, Vodafone, 3UK

VOICE + DATA PLANS with Unlimited Voice and Device not included: Strategy, prices and GB included in the offers analysis



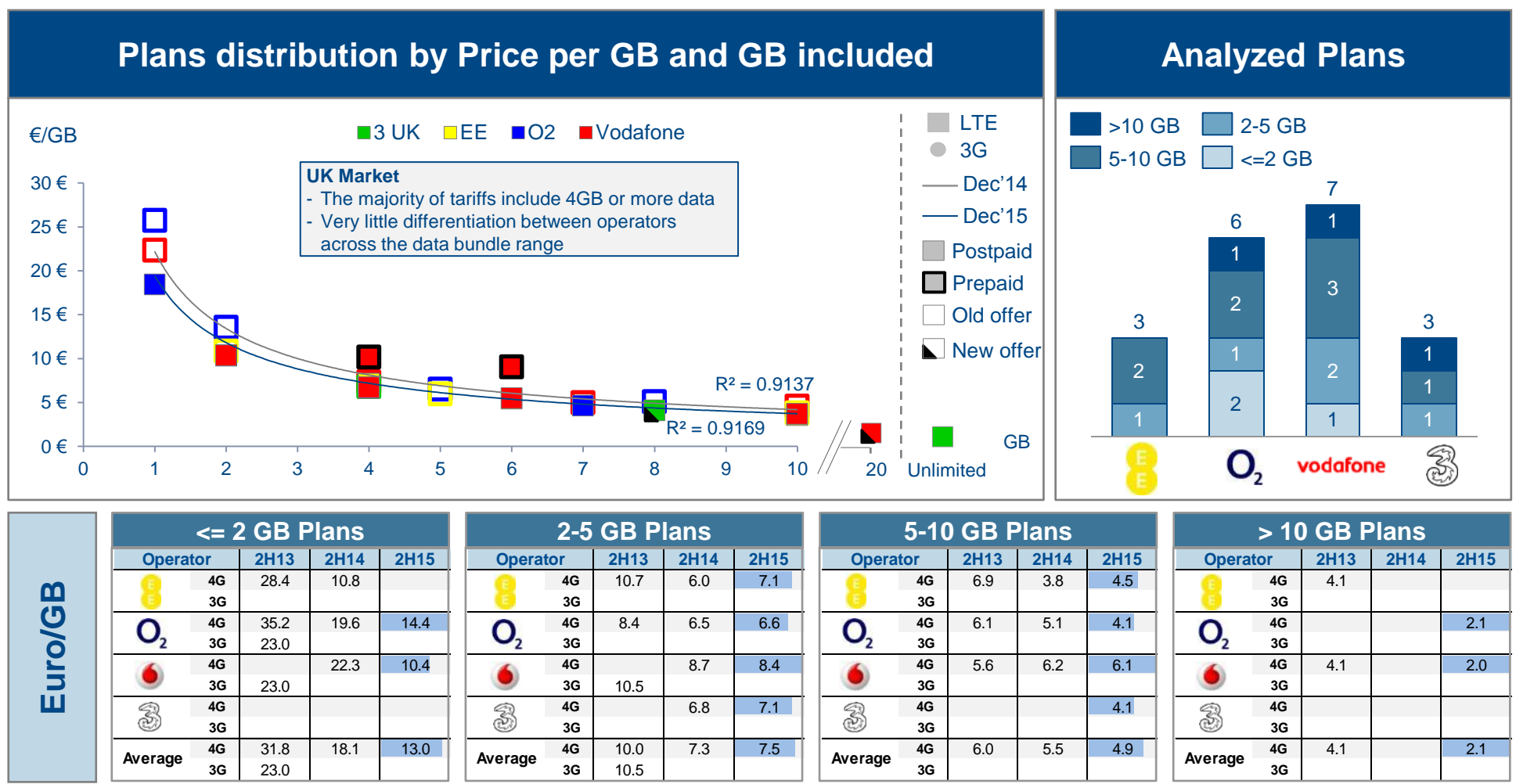
Strategy outline

<p>Market average prices based on:</p> <ul style="list-style-type: none"> Tariffs concentrated in the mid-sized data bundles range All tariffs are in the same GB size as offers from other operators Offering free WIFI to all tariffs at London tube stations <p>Market share: 32% '14, 31% '15</p>	<p>Market average prices based on:</p> <ul style="list-style-type: none"> Most noticeable price per GB reductions over the last semester among different operators, with significantly increased data allowances Share plans are available at £6 a month O2 priority app provides a wide variety of offers and discounts <p>Market share: 31% '14, 31% '15</p>	<p>Competitive prices based on:</p> <ul style="list-style-type: none"> The widest choice of tariffs in the unlimited "voice+data" market Only operator to offer prepaid unlimited voice + data tariffs Postpaid tariffs are in line with market averages All plans except for the 2GB tariff include a subscription to Spotify, Sky sports or NowTV Share plans available for £12 a month <p>Market share: 25% '14, 25% '15</p>	<p>Competitive prices based on:</p> <ul style="list-style-type: none"> Offers the only unlimited data tariff on the market An unlimited data tariff that is cheaper than the large data offers from Vodafone & O2 Two other tariffs are below the market average (4GB and 8GB) Free WIFI at London tube stations <p>Market share: 13% '14, 13% '15</p>
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Sample: EE, O2, Vodafone, 3UK
*Source: Merrill Lynch Global Wireless Matrix



VOICE + DATA PLANS with Unlimited Voice and Device not included: Price per GB analysis



Sample: EE, O2, Vodafone, 3UK

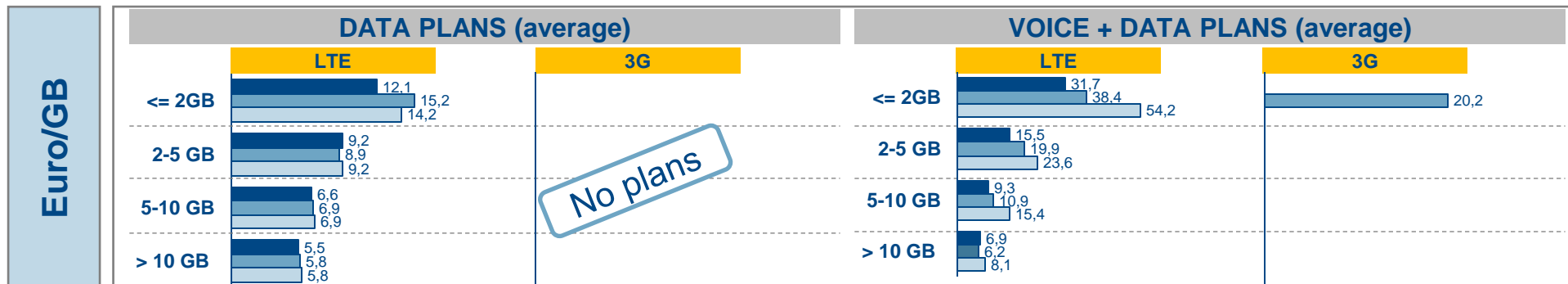
Agenda

- 1 Context & Methodology
- 2 Executive Summary
- 3 Tariff Benchmarking per Country**
 - 3.1 Western Europe
 - 3.2 North America**
 - 3.3 Middle East

COUNTRY SUMMARY: main indicators of the country

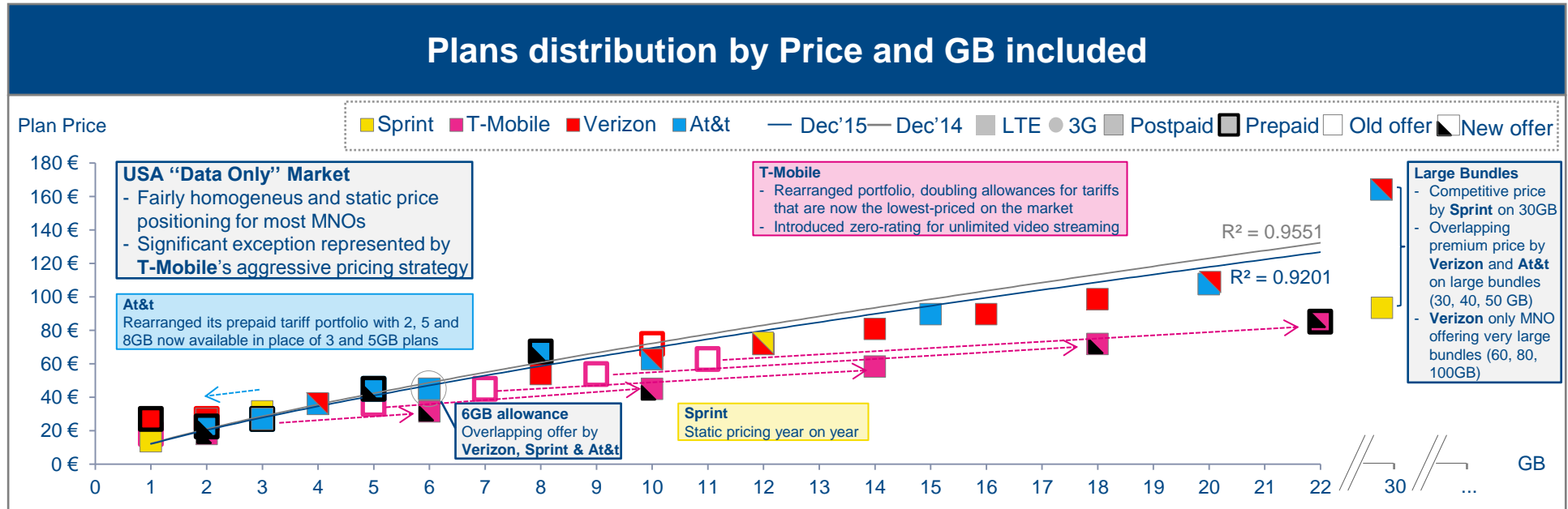


- As of December 2014, LTE population coverage reached 94%, while LTE penetration reached 50% of all mobile connections
- Clear positioning by all MNOs in “unlimited voice+data” tariffs - with At&t and Verizon offering premium pricing and focusing on family share plans - while T-Mobile and Sprint compete through a value-for-money proposition including plans with unlimited data
- Fairly homogenous positioning for most MNOs in “data only” tariffs, with the exception of T-Mobile’s new aggressive and innovative strategy (doubled data bundles and launched zero-rating video streaming on major content providers)
- Remarkable overall advancement in Value Added Services, with MNOs integrating their offers with: cloud storage, proprietary hotspots, Wifi calling and international connectivity (data, voice and SMS) but also several entertainment and music related services

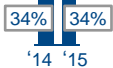


Source: Merrill Lynch Global Wireless Matrix, 4G Americas, Arthur D. Little Analysis ■ 2H15 ■ 2H14 ■ 2H13

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



Market average pricing strategy

- Unmodified **postpaid** offer including a wide choice of sharable **plans**
- Two new **prepaid** plans (GoPhone 2 & 8GB)
- One of 2 MNOs with Verizon, offering **very large bundles** (30GB+) for premium prices
- Value Added Services** include: **1GB of data usage abroad** (Mexico), proprietary national Wi-Fi **HotSpot network**
- Mobile TV only available for extra charge



Market average pricing strategy

- Unmodified **postpaid** offer including a wide choice of sharable **plans**
- Except for "Data Device Plan 1GB", **most prepaid tariffs went from monthly to by-monthly** (thus out of scope)
- One of 2 MNOs with At&t, offering **very large bundles** (30GB+) for premium prices
- VAS** Include: **5GB of cloud storage, and entertainmt.** (NFL Mobile, Go90, Indicar)



New price leadership strategy

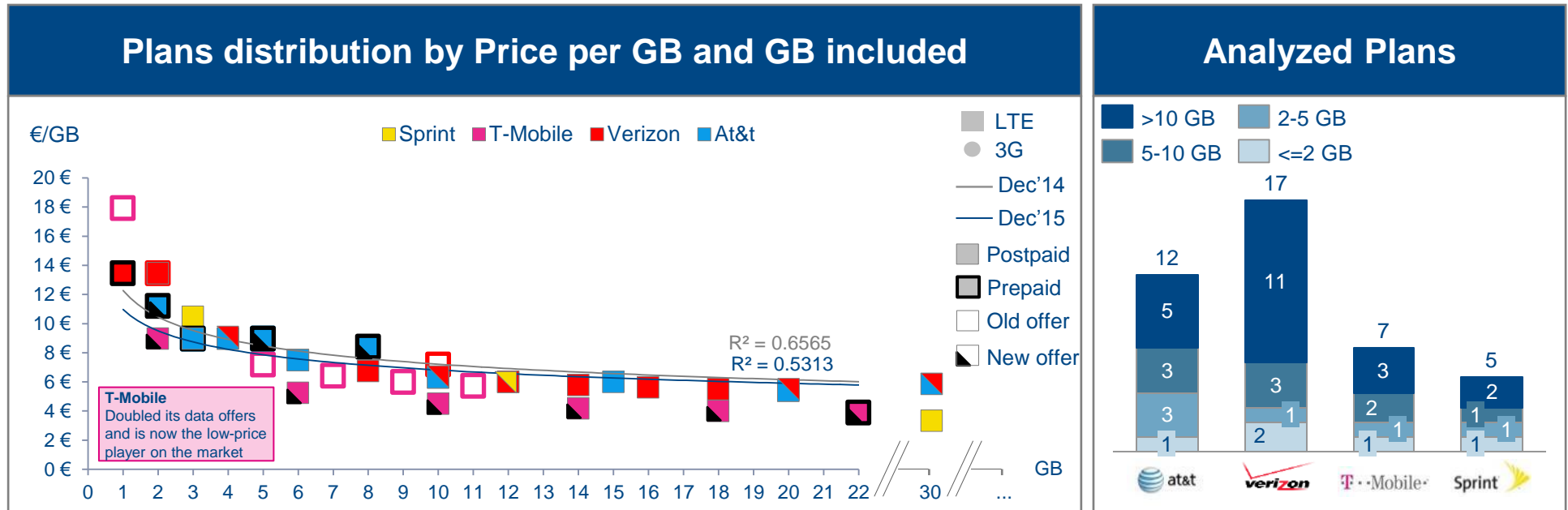
- "Double your data without paying the price" advertises a **new very competitive pricing strategy**
- Most offers available for same **pre & postpaid** price (3 & 22GB only prepaid)
- Introduced **BingeOn** for **zero-rating video on major content providers** (but Youtube)
- Other **VAS**: **zero-rating 'Music Freedom', allowance usage in Canada and Mexico**



Market average prices for low bundles, below market prices for large bundle

- Unmodified offer** since last year, including:
 - 1,6,12 GB bundles **in line** with the market
 - highest priced 3GB offer** on the market
 - very competitive 30GB bundle** for 110\$ (vs. 195\$ price by At&t and Verizon)
- VAS** Include: **5GB Cloud Storage** and **Sprint TV** with live and on demand contents

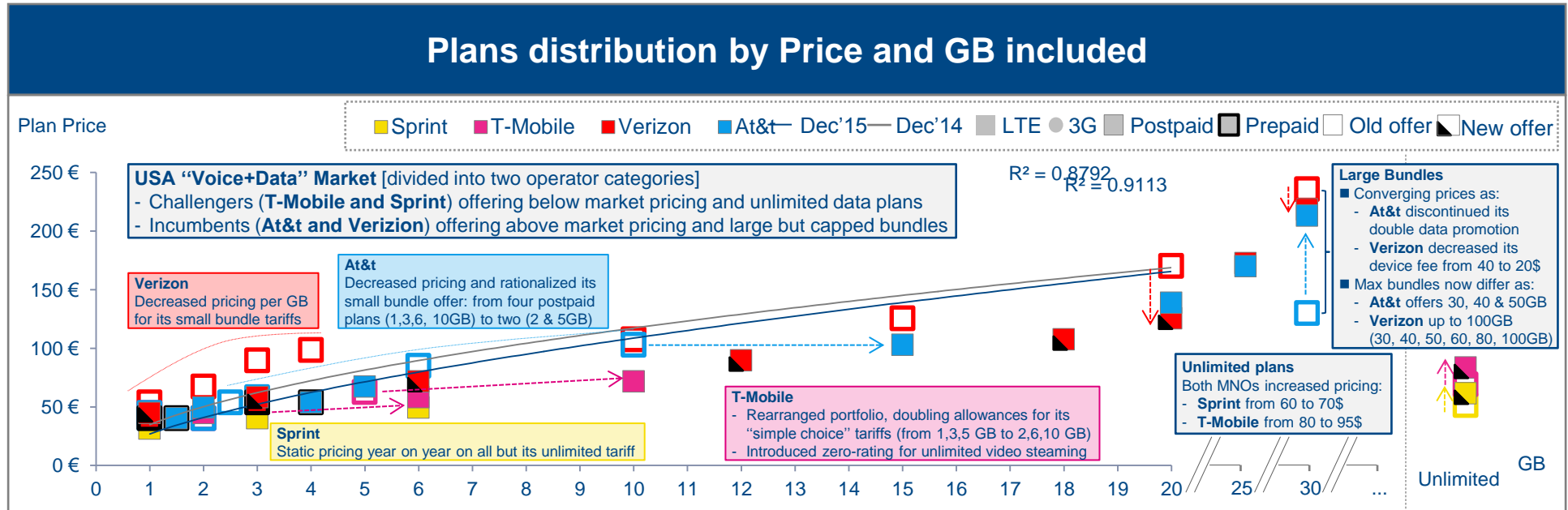
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
	4G	at&t			11.2	at&t	4G	9.0	9.0	9.0	at&t	4G	6.9	6.9	7.4	at&t	4G	5.9	5.9	5.9
3G	at&t				at&t	3G				at&t	3G				at&t	3G				
4G	verizon	15.7	14.9	13.4	verizon	4G	9.0	9.0	9.0	verizon	4G	6.9	7.0	6.8	verizon	4G	5.8	5.9	5.9	
3G	verizon				verizon	3G				verizon	3G				verizon	3G				
4G	T-Mobile		17.9	9.0	T-Mobile	4G	9.4	8.1	9.0	T-Mobile	4G	6.6	6.2	4.9	T-Mobile	4G	5.9	5.7	4.0	
3G	T-Mobile				T-Mobile	3G				T-Mobile	3G				T-Mobile	3G				
4G	Sprint	11.2	13.4	13.4	Sprint	4G	10.4	10.5	10.5	Sprint	4G	7.5	7.5	7.5	Sprint	4G	6.0	4.6	4.6	
3G	Sprint				Sprint	3G				Sprint	3G				Sprint	3G				
4G	Average	14.2	15.2	12.1	Average	4G	9.2	8.9	9.2	Average	4G	6.9	6.9	6.6	Average	4G	5.8	5.8	5.5	
3G	Average				Average	3G				Average	3G				Average	3G				

Sample: AT&T, Sprint, T-Mobile, Verizon

VOICE + DATA PLANS: Strategy, prices and GB included in the offers analysis



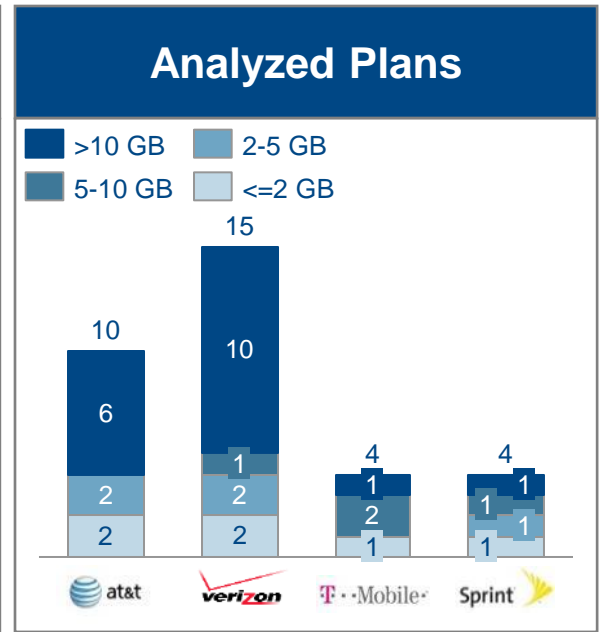
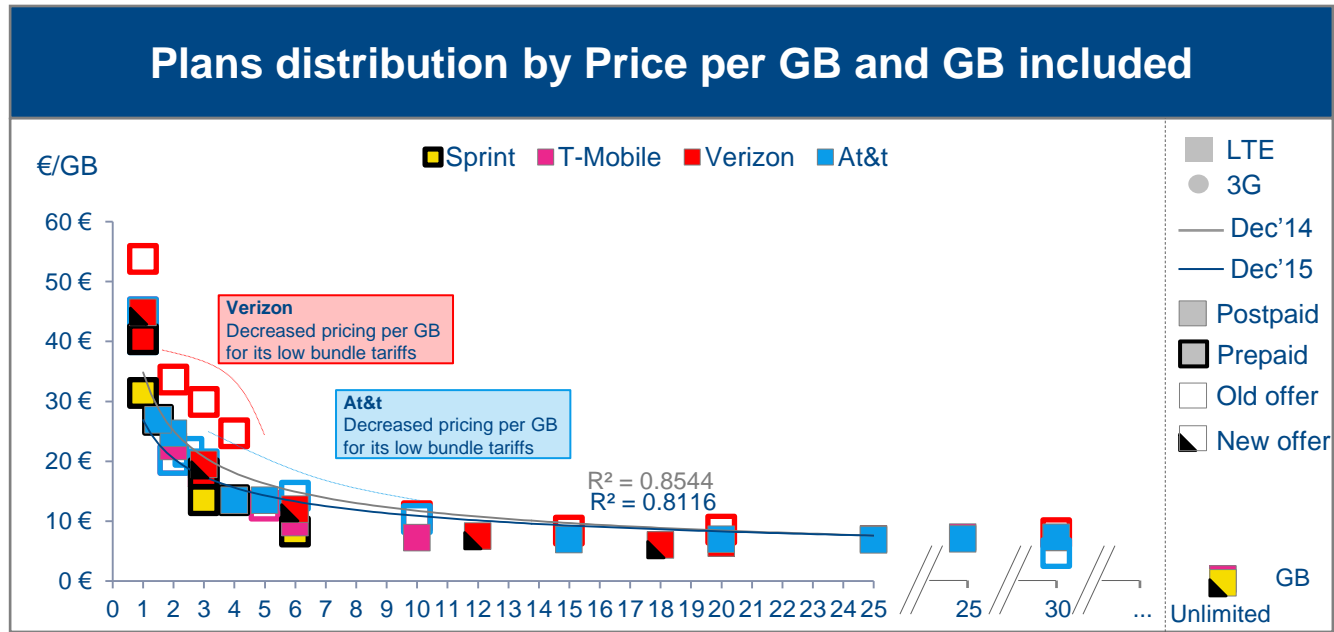
Strategy outline

<p>34% '14 '15</p> <p>Premium offers strategy</p> <ul style="list-style-type: none"> Higher-end of pricing range (e.g highest or close second to Verizon on most bundles) Strong price/GB increase for large bundles (e.g. 30GB from 145 to 240\$) as Q3 2014 double data promotion was discontinued Value Added Service include 50GB cloud storage, proprietary Wi-Fi hotspot, plan sharability, and several international passes: unlimited outbound voice & SMS to Mexico and Canada, 1GB of data usage in Mexico 	<p>30% '14 '15</p> <p>Premium offers strategy</p> <ul style="list-style-type: none"> Higher-end of pricing range (e.g highest tariffs on 1, 3, 6GB plans) Prepaid lower priced than same size postpaid tariffs (e.g. 1, 3GB) Decreased device fee from 40 to 20\$ for share plans (single-line version reported) Value Added Service include: 5GB Cloud, Anti-Virus, unlimited outbound SMS from US Additional entertainment VAS for postpaid 	<p>15% '14 '15</p> <p>New competitive strategy</p> <ul style="list-style-type: none"> "Double your data without paying the price" advertises new competitive price strategy All offers have same pre & postpaid price Introduced BingeOn for zero-rating video on major content providers (but Youtube) Other VAS: zero-rating music, data usage, calling and texting in Canada and Mexico Share plans available (unreported as they consist in a discount on regular plans) 	<p>16% '14 '15</p> <p>Price leadership strategy</p> <ul style="list-style-type: none"> Similar offer with respect to last year, with: - lowest priced 1, 3 & 5GB offers – prepaid - unlimited data plan, slightly increase in price (from 60 to 70\$) but still available at a lower price than T-Mobile's (95\$) VAS Include: 5GB Cloud Storage and Sprint TV with live and on demand contents
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Sample: AT&T, Sprint, T-Mobile, Verizon



VOICE + DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans				2-5 GB Plans				5-10 GB Plans				> 10 GB Plans							
	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15	Operator		2H13	2H14	2H15
	4G	3G				4G	3G				4G	3G				4G	3G			
	at&t	4G	48.5	42.5	25.8	at&t	4G	24.6	20.5	13.4	at&t	4G	16.0	12.2		at&t	4G	10.1	3.7	7.0
	at&t	3G		20.2		at&t	3G				at&t	3G				at&t	3G			
	verizon	4G	62.7	43.7	42.5	verizon	4G	24.6	27.2	18.7	verizon	4G	15.0	10.7	11.9	verizon	4G	7.1	7.7	6.9
	verizon	3G				verizon	3G				verizon	3G				verizon	3G			
	T-Mobile	4G		32.5	22.4	T-Mobile	4G	21.5	15.2		T-Mobile	4G			8.4	T-Mobile	4G			
	T-Mobile	3G				T-Mobile	3G				T-Mobile	3G				T-Mobile	3G			
	Sprint	4G		31.4	31.4	Sprint	4G		13.4	13.4	Sprint	4G		8.2	8.2	Sprint	4G			
	Sprint	3G				Sprint	3G				Sprint	3G				Sprint	3G			
	Average	4G	54.2	38.4	31.7	Average	4G	23.6	19.9	15.5	Average	4G	15.4	10.9	9.3	Average	4G	8.1	6.2	6.9
	Average	3G		20.2		Average	3G				Average	3G				Average	3G			

Sample: AT&T, Sprint, T-Mobile, Verizon

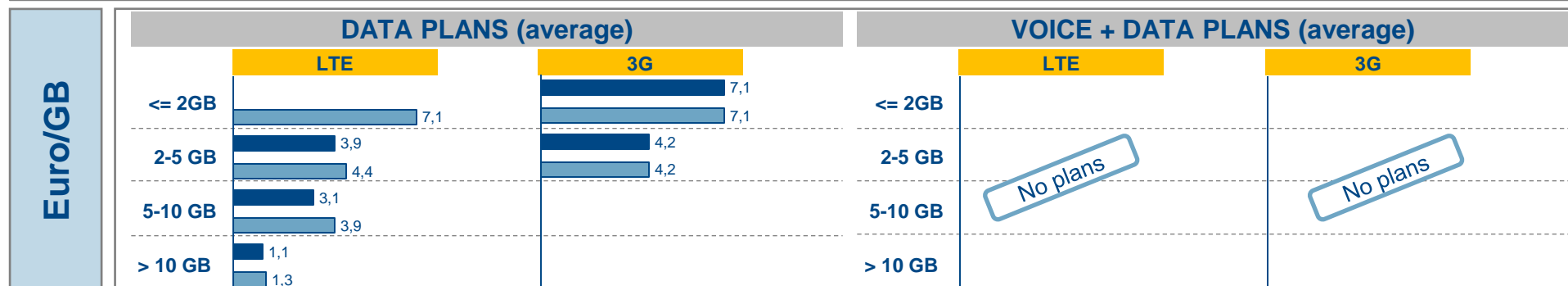
Agenda

- 1 Context & Methodology
- 2 Executive Summary
- 3 Tariff Benchmarking per Country**
 - 3.1 Western Europe
 - 3.2 North America
 - 3.3 Middle East**

COUNTRY SUMMARY: main indicators of the country



- Market rapidly moving towards high-value wireless and wireline data services, supported by the launch of LTE
- Low level of strategy differentiation between the players – not in terms of offer nor in terms of pricing
- Large broadband allowances offered as share plans for both home and “on the go” use
- Limited differentiation based on 3G / LTE

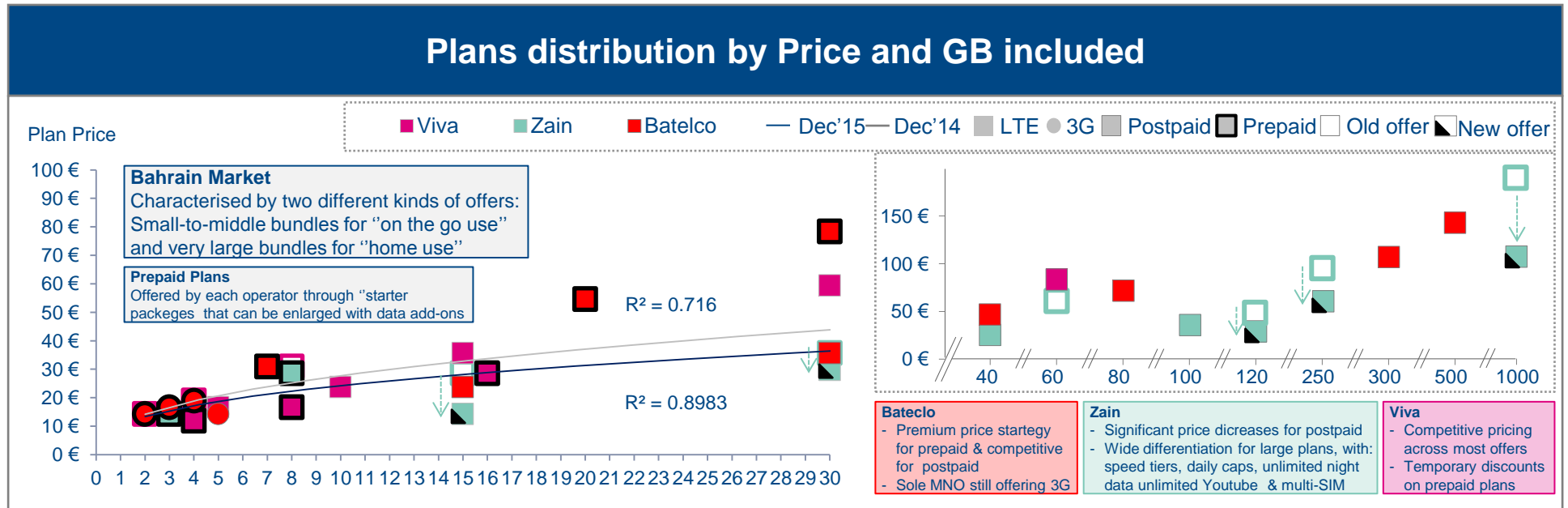


Source: Kingdom of Bahrain TRA, Arthur D. Little Analysis

■ 2H15 ■ 2H14



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

Competitive Price Strategy

- Most offers run on an **efficient LTE network**, but **3G plans** are also available
- Prepaid "starter package"** for on-the-go users
- Very large broadband plans** for simultaneous home and "on the go" use, to share among up to 4 SIMs
- 3G plans** available at a significant lower price/GB

Competitive Price Strategy

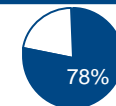
- All offers run on an **efficient LTE network**
- Prepaid "starter package"** for on-the-go users
- Offers **very large broadband plans as share plans** for both home and "on the go" use
- Convenient 120GB plan subject to a 4GB/day cap
- Free dongle** available at no extra fee

Competitive Price Strategy

- All offers run on an **efficient LTE network**
- Prepaid "starter package"** for on-the-go users
- For each price point, possibility of **increasing data allowances for longer engagement periods** (no contract, 12 or 18 months retention)
- Free dongle** available with longer engagement periods
- "Home line"** available for postpaid offers

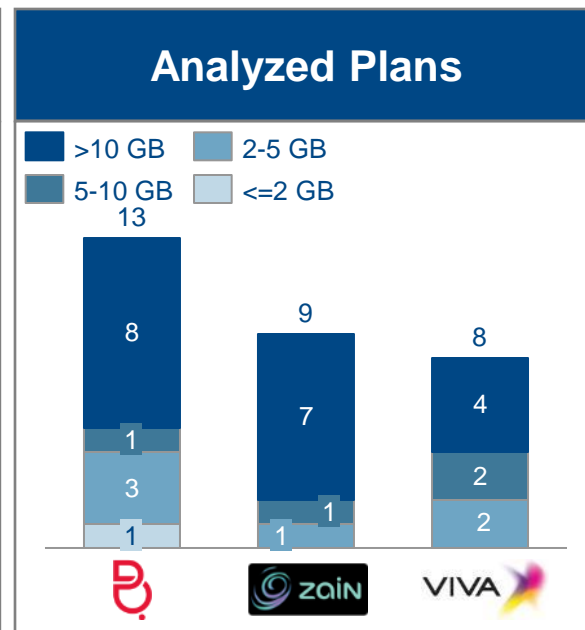
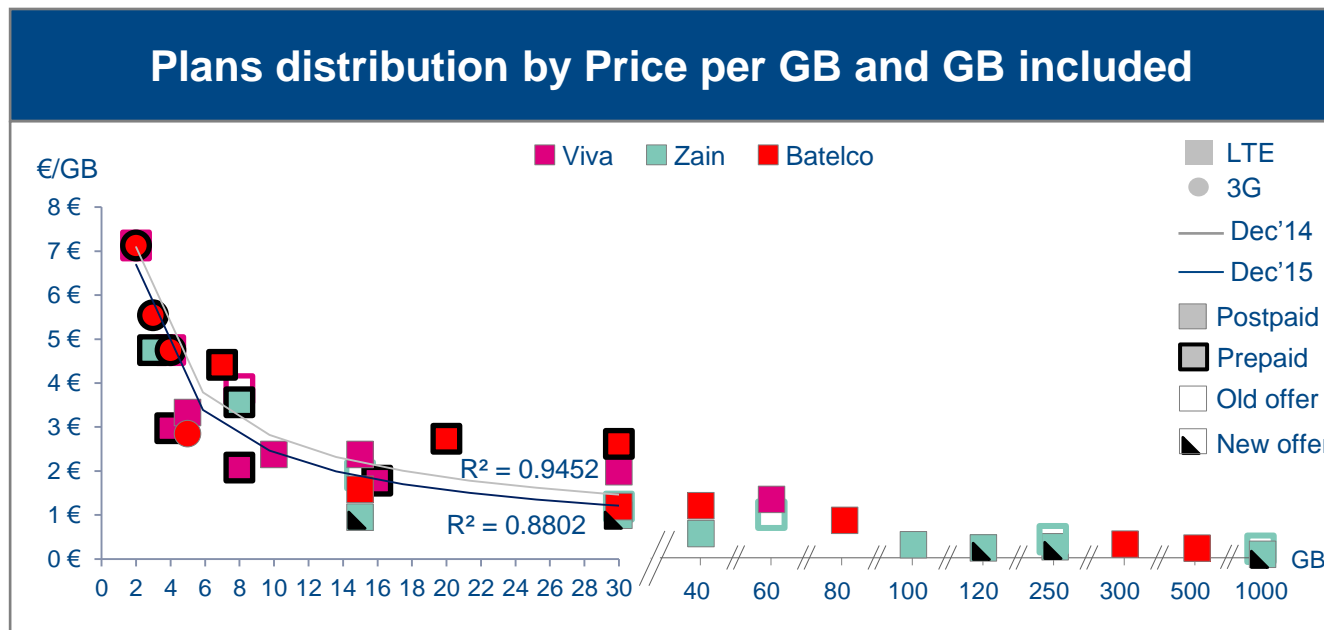
Sample: Batelco, Viva, Zain





182%

DATA PLANS: Price per GB analysis



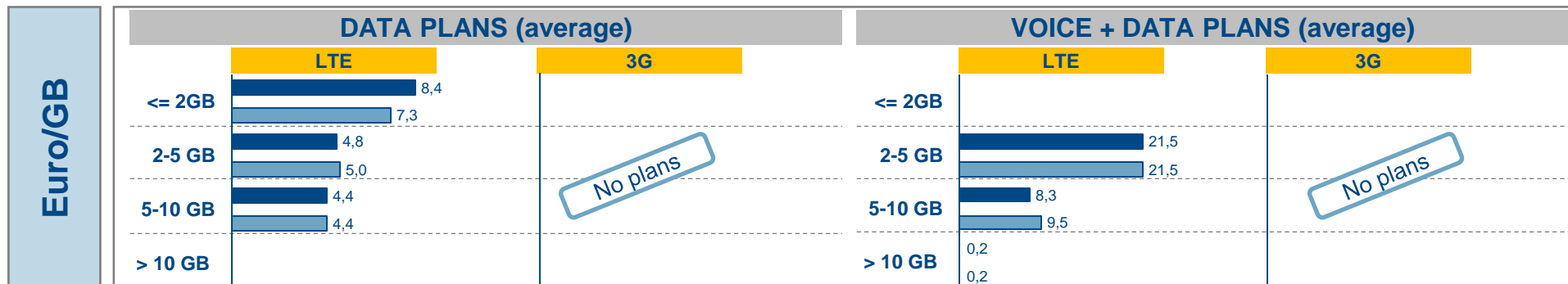
Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
	Batelco	4G		Batelco	4G	4.7	Batelco	4G	4.4	Batelco	4G	1.4
		3G	7.1		3G	4.2		3G			3G	
	Zain	4G		Zain	4G	4.7	Zain	4G	3.6	Zain	4G	0.8
		3G			3G			3G	3.6		3G	0.5
	Viva	4G	7.1	Viva	4G	4.0	Viva	4G	3.9	Viva	4G	1.9
		3G			3G	3.1		3G	2.2		3G	1.9
	Average	4G	7.1	Average	4G	4.4	Average	4G	3.9	Average	4G	1.3
		3G	7.1		3G	4.2		3G	3.1		3G	1.1

Sample: Batelco, Viva, Zain

COUNTRY SUMMARY: main indicators of the country



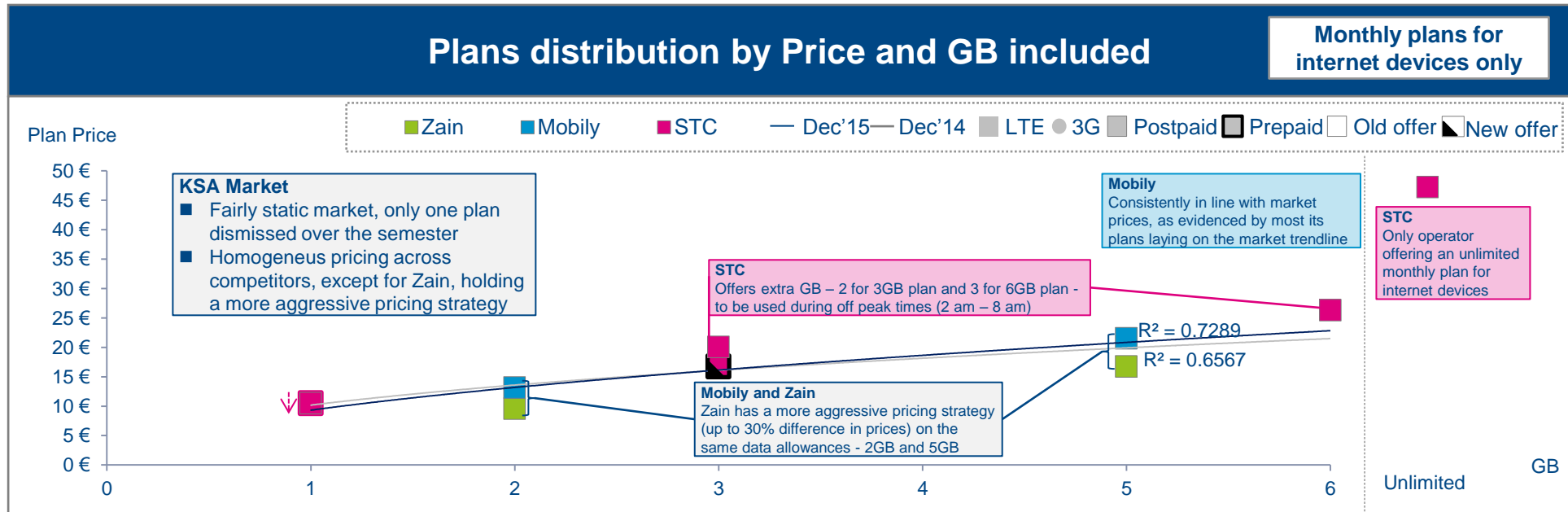
- Wide offering from the 3 service providers in terms of data allowances
- MNOs competition resulting in pricing standing at the low end of the GCC region
- Competition is expected to increase after the launch of 3 MVNOs
- Future pricing is expected to be driven by new network and VAS services (e.g. Zain capitalizing on LTE, unlimited Youtube, etc.)



Source: KSA Ministry of ICT, Arthur D. Little Analysis

■ 2H15 ■ 2H14

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

43% '13 43% '14

Competitive price strategy:

- No retention 1 month postpaid/prepaid plans only for internet devices (keys, tablets, etc.)
- More conservative pricing strategy with:
 - 2GB plan priced at 55SAR vs. 40 for Zain
 - 5GB plan priced at 90SAR vs. 70 for Zain
- Overall prices in line with market trendline

41% '13 40% '14

Competitive price strategy:

- No retention 1 month postpaid/prepaid plans only for internet devices (keys, tablets, etc.)
- Offers extra GB to be used off peak times
- Option giving access to a national network of 3.000 WiFis for an activation cost of extra 100 SAR/mth (free for fixed line clients)

15% '13 18% '14

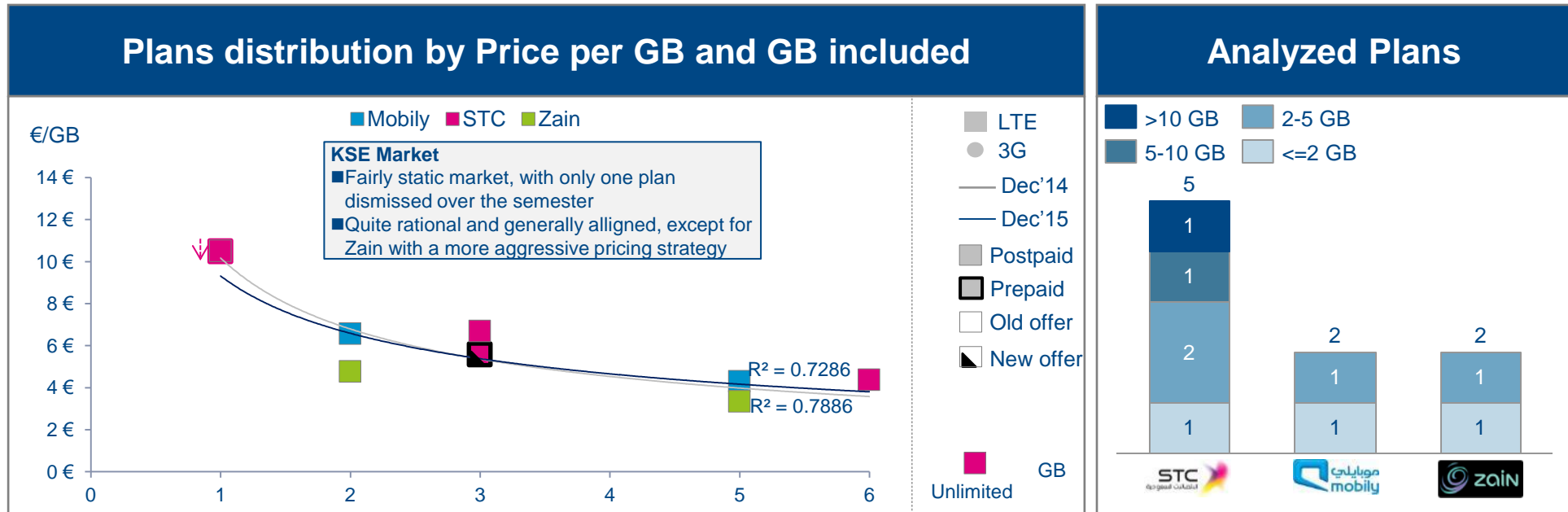
Competitive pricing strategy:

- No retention 1 month postpaid/prepaid plans only for internet devices (keys, tablets, etc.)
- Overall prices below market trendline

Sample: Mobily, STC, Zain
 Note: plans with larger GB data allowances were excluded for comparability reasons, as they are only available on a multi-monthly basis



DATA PLANS: Price per GB analysis

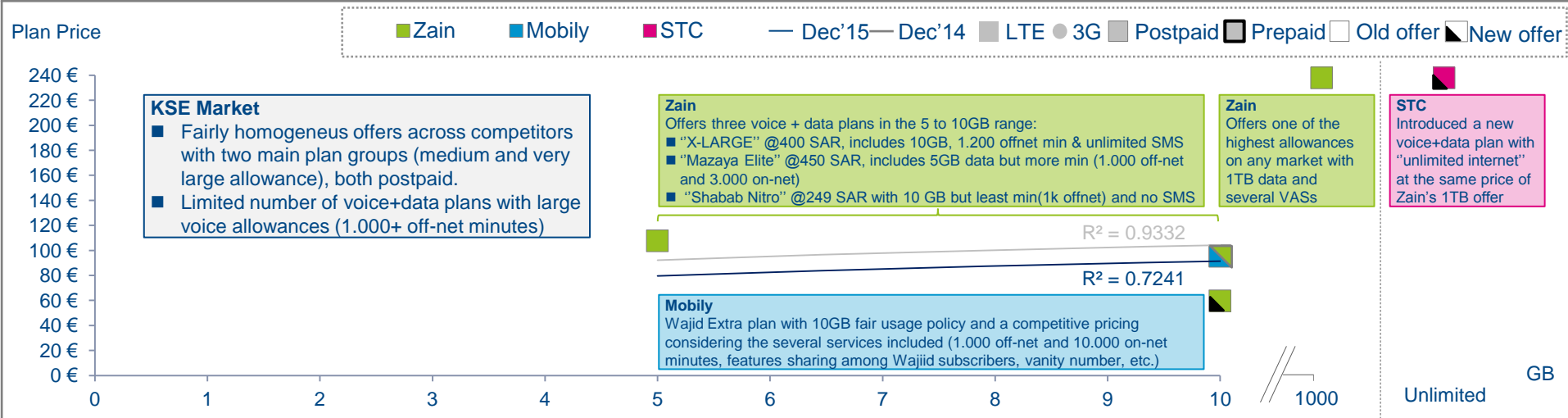


Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans					
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15			
	STC	4G	11.1	10.5	STC	4G	6.7	6.1	STC	4G	4.4	4.4	STC	4G	N/A
	3G				3G				3G				3G		
Mobily	4G	6.6	6.6	Mobily	4G	4.3	4.3	Mobily	4G			Mobily	4G		
	3G				3G				3G				3G		
Zain	4G	4.8	4.8	Zain	4G	3.3	3.3	Zain	4G			Zain	4G		
	3G				3G				3G				3G		
Average	4G	8.4	7.3	Average	4G	4.8	5.0	Average	4G	4.4	4.4	Average	4G	N/A	N/A
	3G				3G				3G				3G		

Sample: Mobily, STC, Zain

VOICE + DATA PLANS with no Unlimited Voice (1.000+ off-net) and Device not included: Strategy, prices and GB included in the offers analysis

Plans distribution by Price and GB included



Strategy outline

STC (الخدمات السابقة) 43% '13 43% '14

Competitive price strategy, with the new "unlimited internet" voice+data offer

- STC introduced a new plan with "unlimited internet" and several perks like:
 - Possibility to share data with multiple SIMs
 - Free Vanity number
 - Free Blackberry service
 - International calls and data included
 - Discounts on device with 12 months contract

موبيلي (mobily) 41% '13 40% '14

Competitive price strategy with a mid-sized data bundle and generous on-net allowances

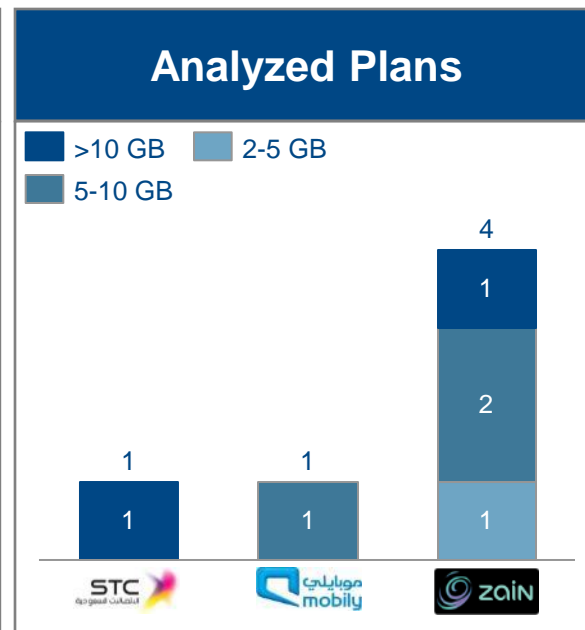
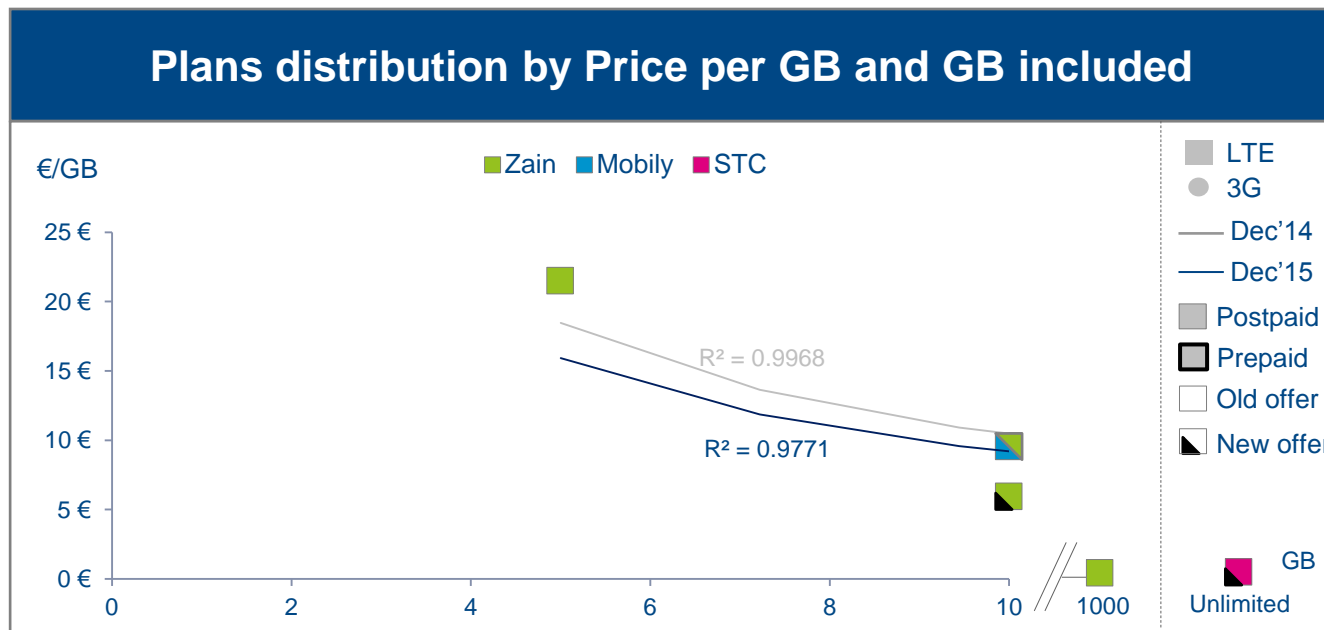
- Mobily is offering an "open internet" plan including several services such as:
 - Possibility to share features (data, minutes, sms) with other "Wajid" subscribers
 - Free Vanity number
 - Free Whatsapp and Blackberry service
 - Discounts on device with 12 months contract

zain 15% '13 18% '14

Competitive price strategy with 1 large offer (1TB) and 3 mid-sized data offers (5 and 10GB)

- Zain offers several additional advantages like:
 - Free Vanity number
 - Free extra-SIMs to share data (same number)
 - Discounts on international calls
 - Discounts on device with 12 months contract
- "Shabab Nitro" voice + data plan also includes unlimited YouTube browsing

VOICE + DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans			
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	
	4G	STC			STC			STC			STC		
3G	STC			STC			STC			STC			
4G	Mobily			Mobily			Mobily	9.5	9.5	Mobily			
3G	Mobily			Mobily			Mobily			Mobily			
4G	Zain			Zain	21.5	21.5	Zain	9.6	7.8	Zain	0.2	0.2	
3G	Zain			Zain			Zain			Zain			
Average	4G			Average	4G	21.5	Average	4G	9.5	8.3	Average	4G	0.2
	3G				3G			3G				3G	0.2

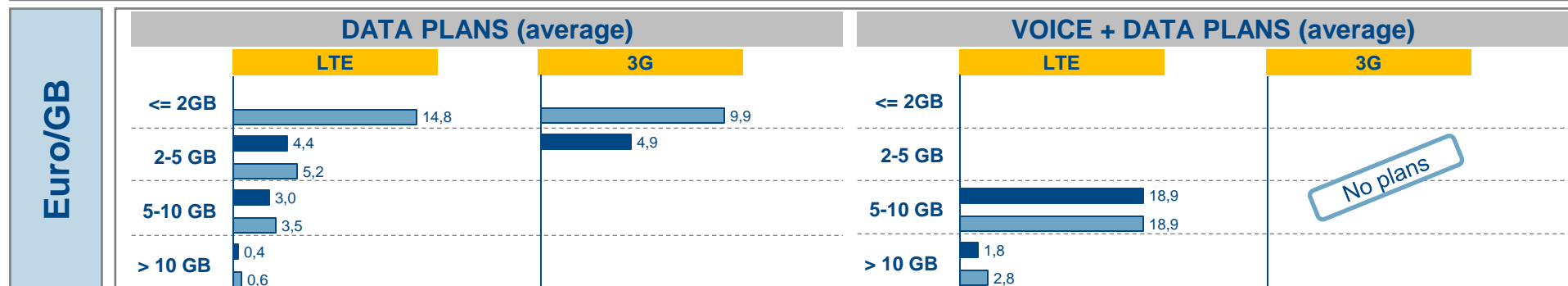
No Plans

Sample: Mobily, STC, Zain

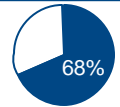
COUNTRY SUMMARY: main indicators of the country



- In spite of being an example of 3 MNOs Middle Eastern market, the higher level of competition is not shown to have a strong diminishing effect on pricing, which is similarly high as in other Middle Eastern markets with 2 players
- Widely differentiated market for "data only" tariffs, with small allowances, often prepaid, available for on-the-go use and larger allowances available for at-home use
- Very high voice+data tariffs with respect to other markets, highly voice driven, with all MNOs demanding a significant price premium for unlimited local minutes, and relatively low premiums for large data allowances

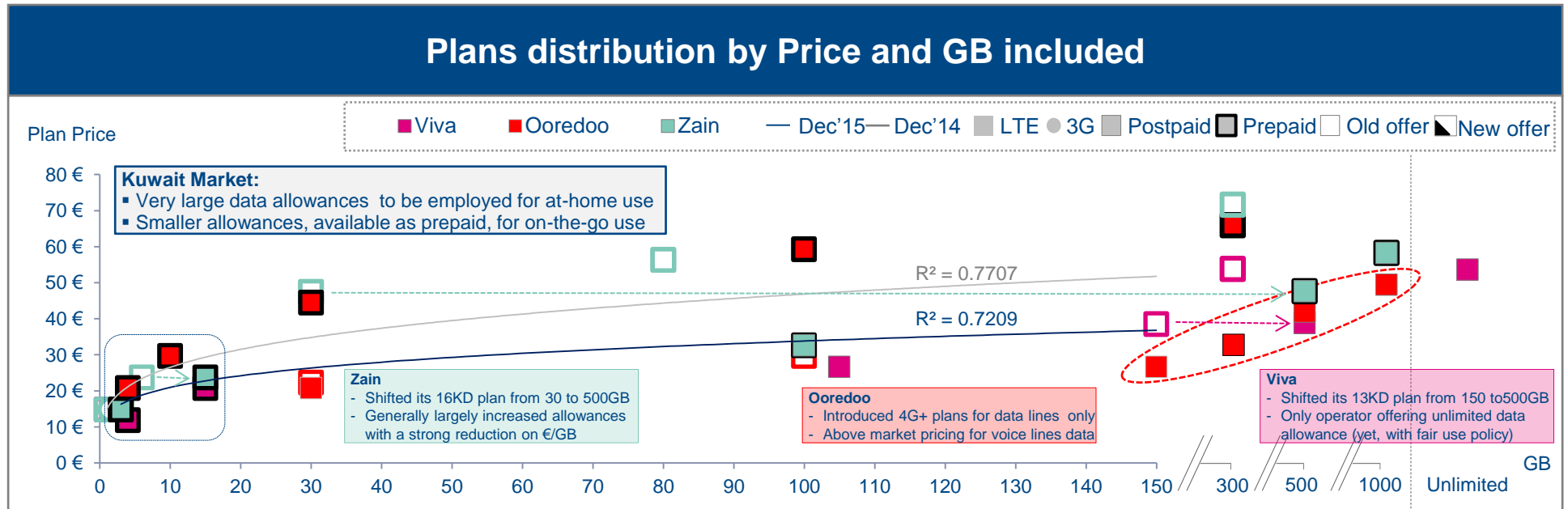


Source: EMIS Intelligence, Arthur D. Little Analysis ■ 2H15 ■ 2H14



218%

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



35% '14

Competitive pricing

- Small data bundles available as prepaid
- Large data bundles available as postpaid
- Prepaid Eezee tariffs include unlimited data over the weekend
- Unlimited gaming data available on 1TB postpaid plan for extra 3KD



33% '14

Competitive pricing on 4G+ offers, above market pricing on MyNet offers

- Two offer lines
 - 4G+ to be only used for data lines (cheaper)
 - MyNet to be used on voice lines (expensive)
- Includes several value added services, like 3 months of free music streaming or the possibility to share data with additional devices



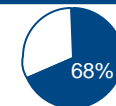
32% '14

Competitive pricing

- Small data bundles available as prepaid
- Large data bundles available as postpaid, with daily caps
- Free social media package included in smaller prepaid offers
- Unlimited offers available for both prepaid and postpaid tariffs (fair use policy applies)

Sample: Ooredoo, Viva, Zain

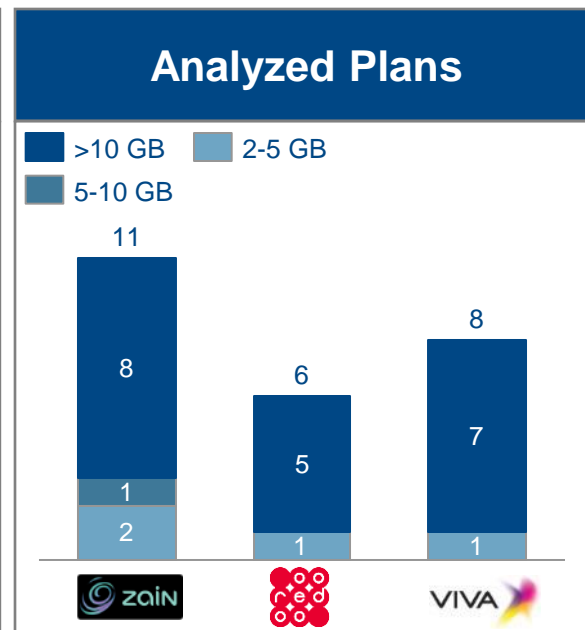
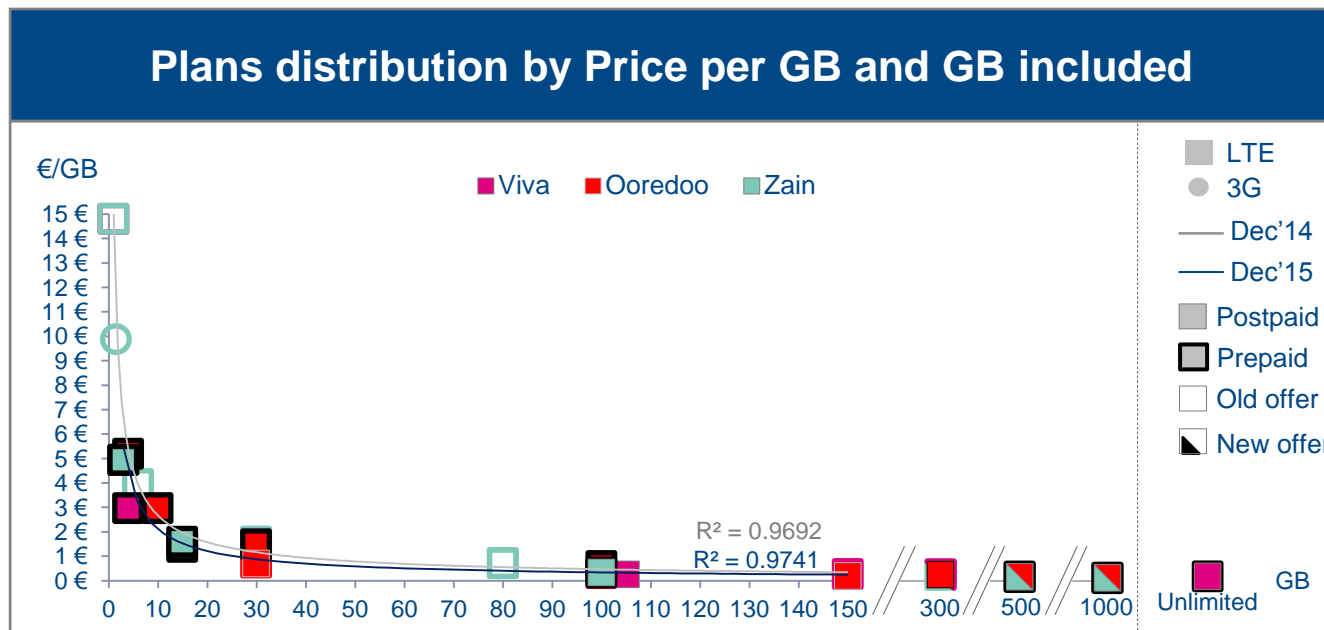




218%



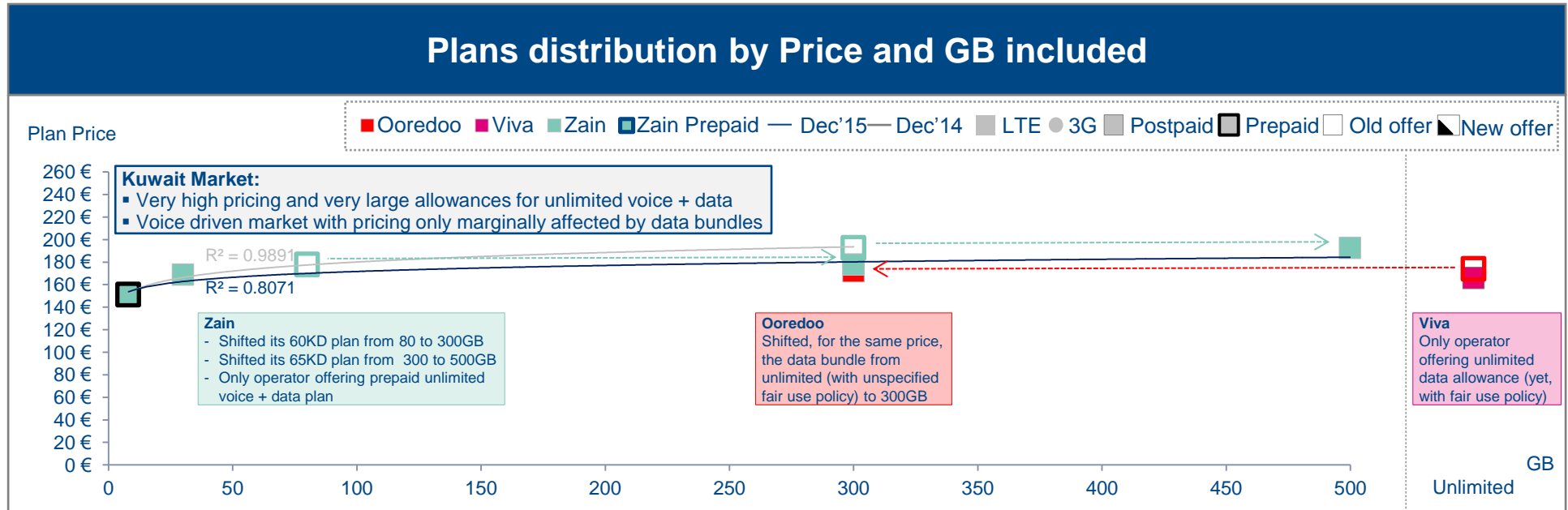
DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
Zain	4G	14.8		4G		4.9	4G	3.9		4G	0.8	0.4
	3G			3G			3G			3G		
Ooredoo	4G			4G	5.2	5.2	4G	3.0	3.0	4G	0.6	0.4
	3G	9.9		3G		4.9	3G			3G		
Viva	4G	14.8		4G		3.0	4G			4G	0.2	0.6
	3G			3G			3G			3G		
Average	4G	14.8		4G	5.2	4.4	4G	3.5	3.0	4G	0.6	0.4
	3G	9.9		3G		4.9	3G			3G		

Sample: Ooredoo, Viva, Zain

VOICE + DATA PLANS with no Unlimited Voice (1.000+ off-net) and Device not included: Strategy, prices and GB included in the offers analysis



Strategy outline



35% '14

Slightly premium priced and highly diversified offering

- Pricing somewhat above market average for its voice + data offering, but wide differentiation for its unlimited voice packages:
 - Widest choice in data allowances (8GB, 30GB, 300Gb or 500GB)
 - Only MNO offering unlimited voice prepaid plan



33% '14

Competitive offering with many value added services

- Shifted data bundle for its voice+data plan from unlimited(w/ unspecified fair use policy) to 300GB
- MNO offering the most value added services on the market, including:
 - International roaming included + discounts
 - 3 free months of music streaming
 - Internet sharing on up to 4 lines

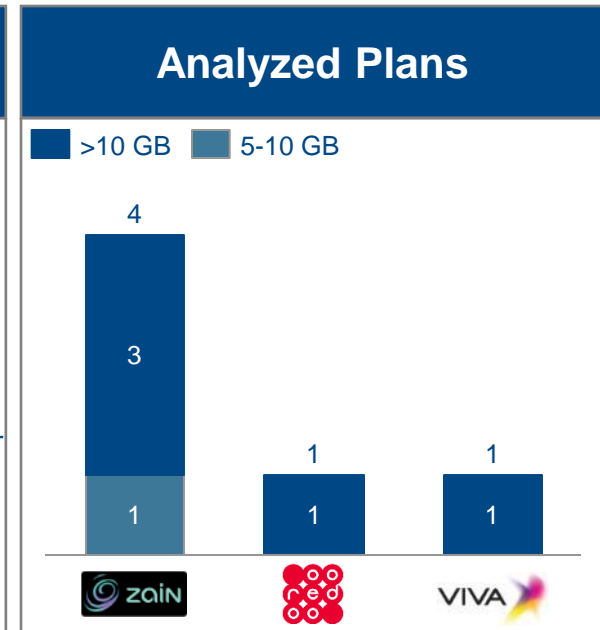
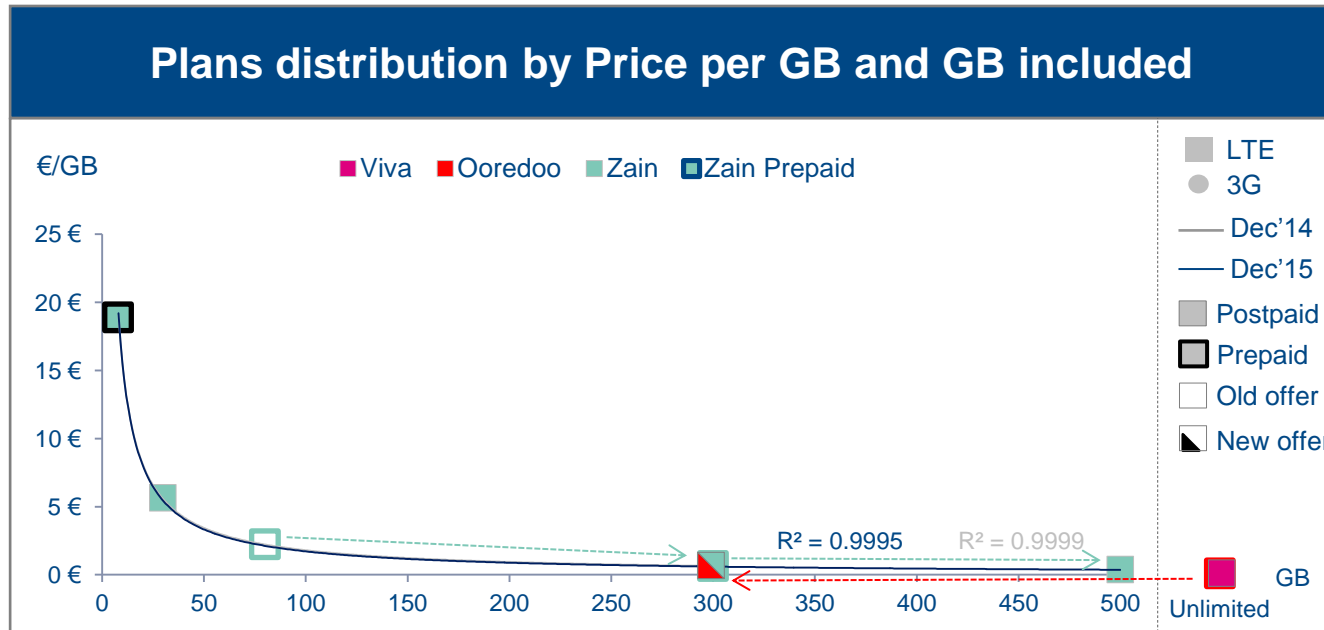


32% '14

Competitive offering with unlimited data package (fair use policy applies)

- No unlimited voice allowance + data available; 5000 minutes plan included in the analysis
- Several value added services, including:
 - International roaming
 - possibility to subscribe to family plans

VOICE + DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
Zain	4G			4G			4G	18.9	18.9	4G	2.8	2.2
	3G			3G			3G			3G		0.6
Ooredoo	4G			4G			4G			4G		
	3G			3G			3G			3G		
VIVA	4G			4G			4G			4G		
	3G			3G			3G			3G		
Average	4G			4G			4G	18.9	18.9	4G	2.8	1.8
	3G			3G			3G			3G		

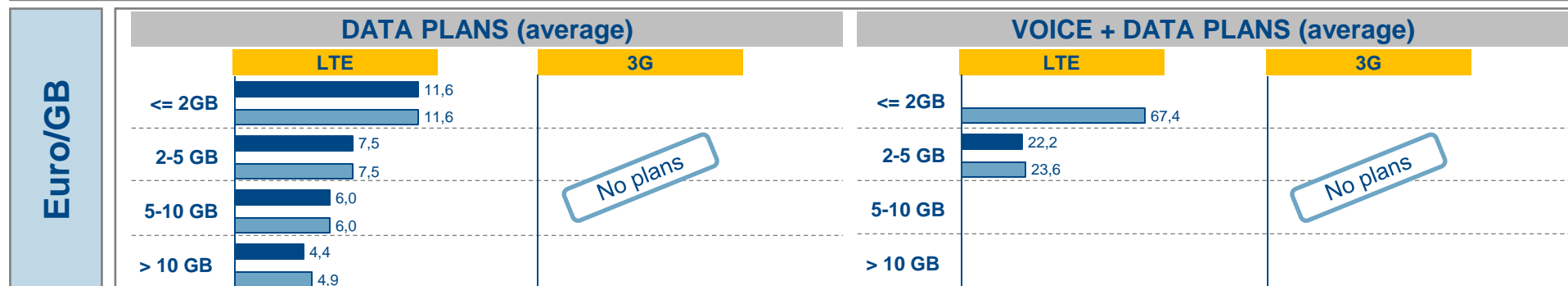
Note: 'No Plans' is indicated for Ooredoo and Viva in the 2-5 GB and <= 2 GB categories.

Sample: Ooredoo, Viva, Zain

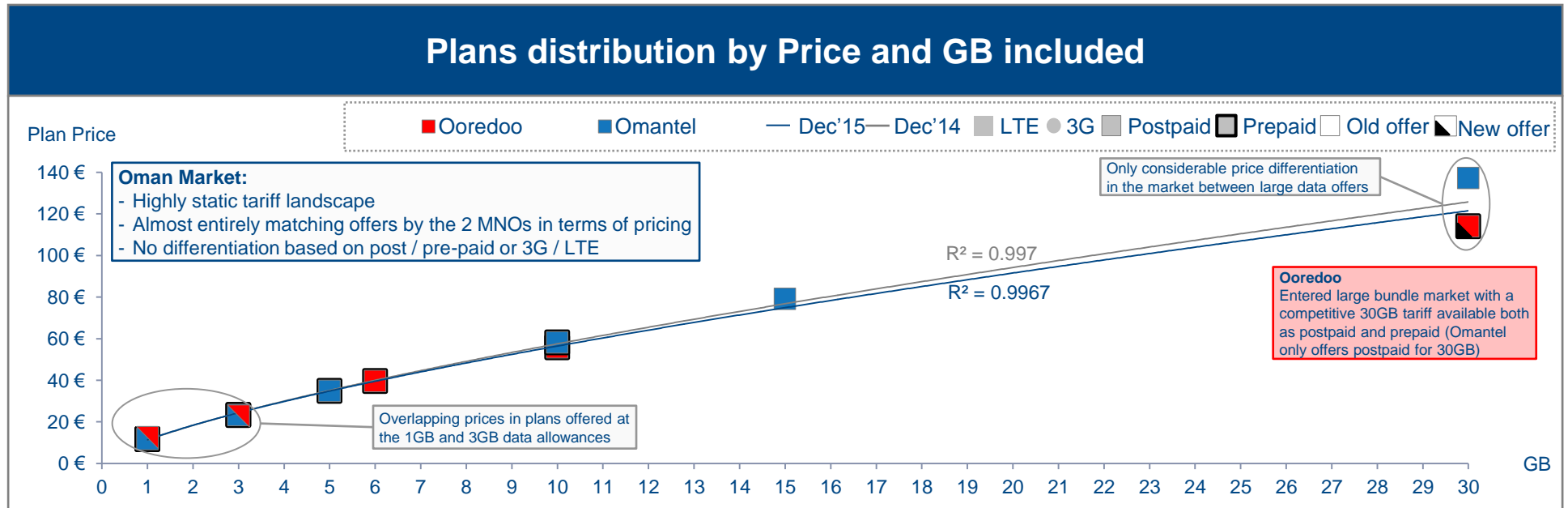
COUNTRY SUMMARY: main indicators of the country



- Low level of competition due to the presence of only 2 main MNOs in the market
- Highly static tariff landscape with no significant differentiation between operators or across semesters
- Future pricing and differentiation are expected to be driven by advanced network services and Value Added Services



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline

48% '13 47% '14

Simple and complete offer portfolio:

- Linear pricing, undifferentiated between pre and postpaid
- Portfolio matching Ooredoo's and covering all major data volumes
- Network speed reaches up to 100 Mbps
- Only minor value added services included such as mobile directory for different establishments and a free Ramadan app

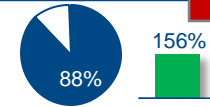
41% '13 41% '14

Simple and complete offer portfolio:

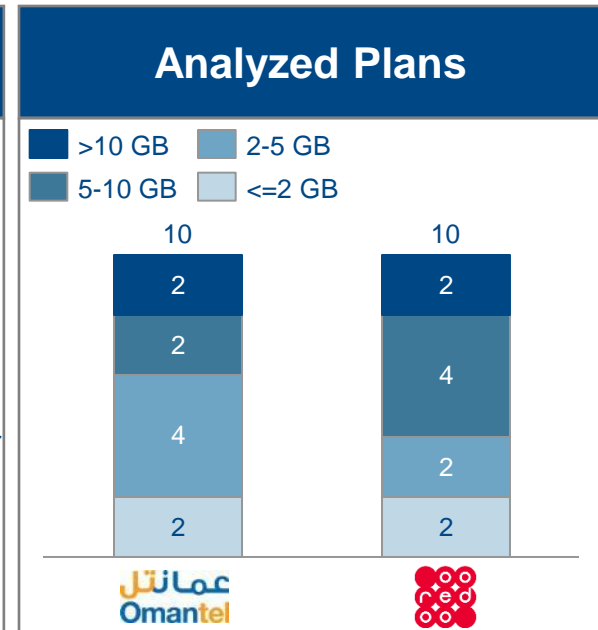
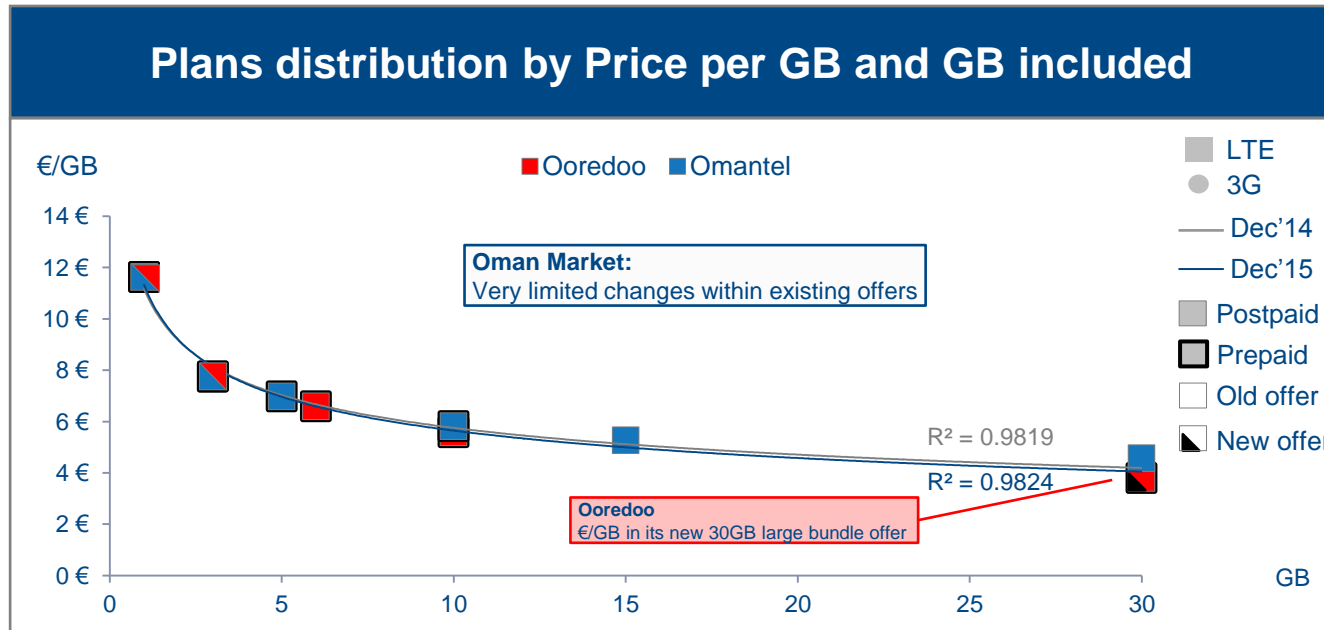
- Linear pricing, undifferentiated between pre and postpaid
- Portfolio matching Omantel's and covering all major data volumes
- Only pricing difference represented by 30GB offer, which is positioned at a lower pricing point than Omantel's
- Two months of free music streaming included

Sample: Omantel, Ooredoo





DATA PLANS: Price per GB analysis



Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
	Omantel 4G 3G	11.6	11.6	5.8	5.8	7.4	7.4	4.9	4.9			
Ooredoo 4G 3G	11.6	11.6	6.1	6.1	7.8	7.8	3.8					
Average 4G 3G	11.6	11.6	6.0	6.0	7.5	7.5	4.4	4.9	4.4			

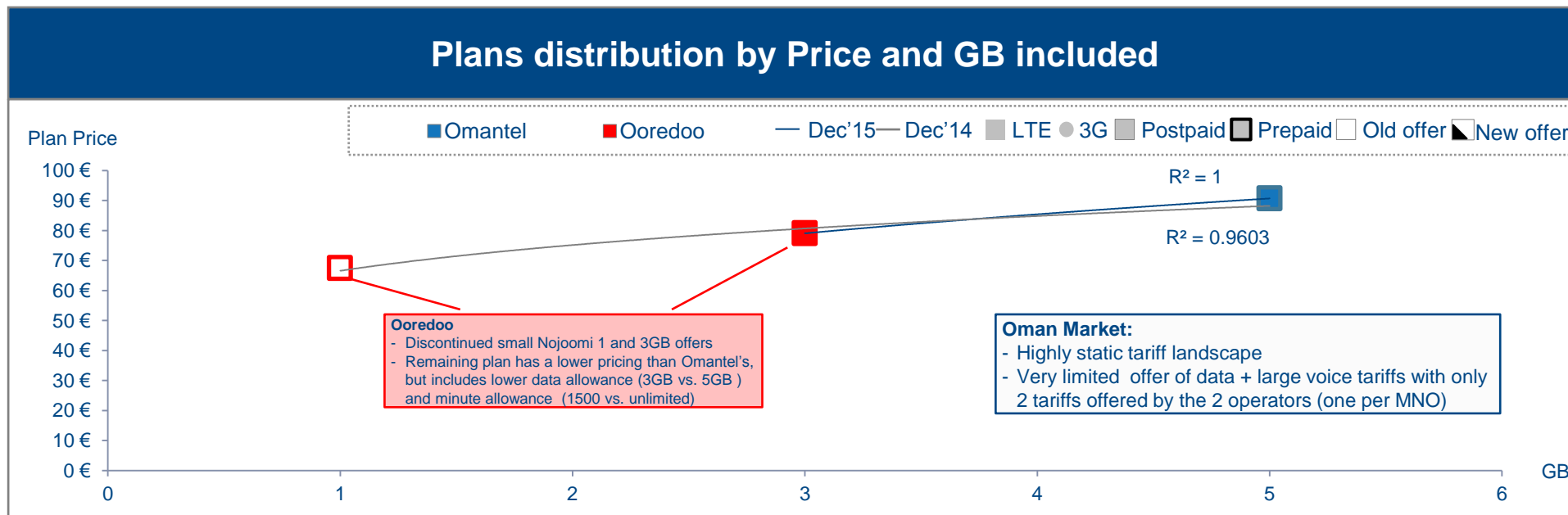
Sample: Omantel, Ooredoo



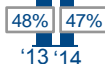
156%



VOICE + DATA PLANS with no Unlimited Voice (1.000+ off-net) and Device not included: Strategy, prices and GB included in the offers analysis



Strategy outline



Intermediate strategy:

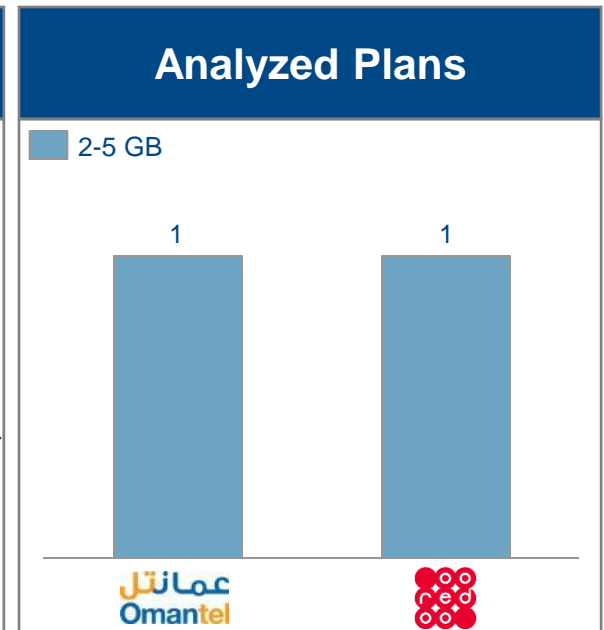
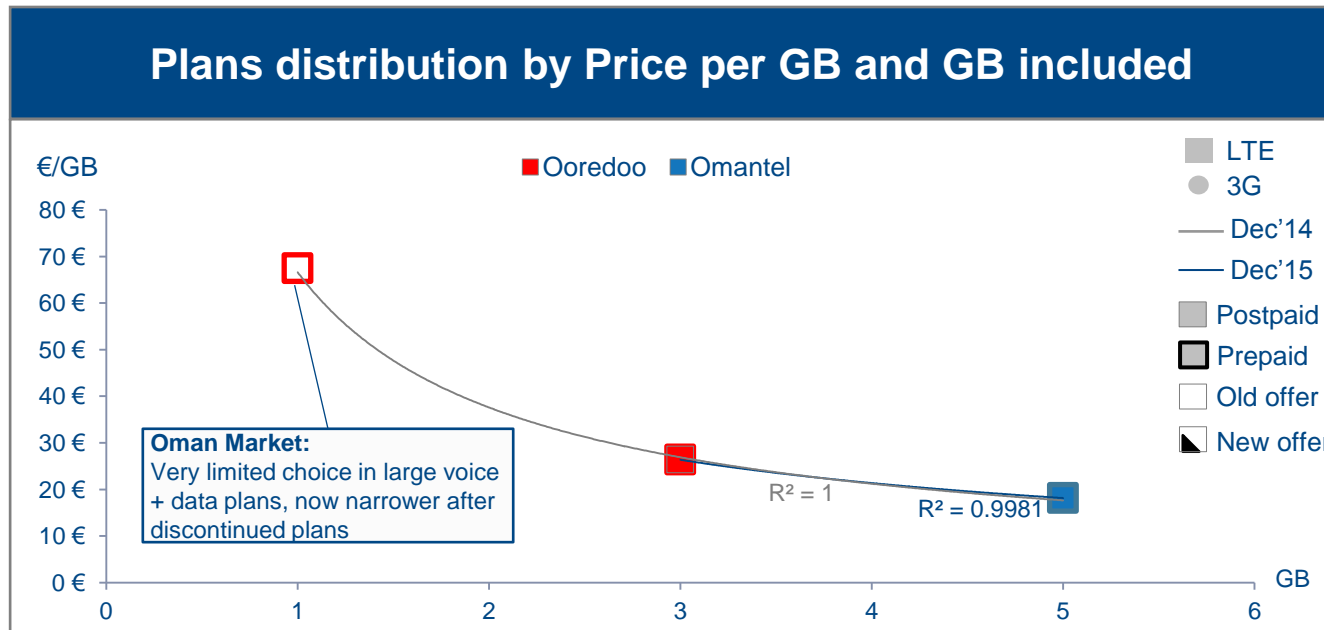
- Price premium for 5GB and unlimited calls
- Network speed reaches up to 100 Mbps
- Minor OTT and VAS like a mobile directory for different establishments and a free Islamic Ramadan app included
- Twin sim service: allows the to use of the GSM number in two separate devices



Top "voice + data plan" offers limited minutes but several value added services:

- Single postpaid plan with 3GB and 1500 minutes
- Allowance complemented by 10GB extra data and 2500 extra minutes during weekends
- Competitive price, also in light of VAS, e.g.:
 - Exclusive mobile content portal
 - Priority customer service
 - Two months of free music streaming included

VOICE + DATA PLANS: Price per GB analysis



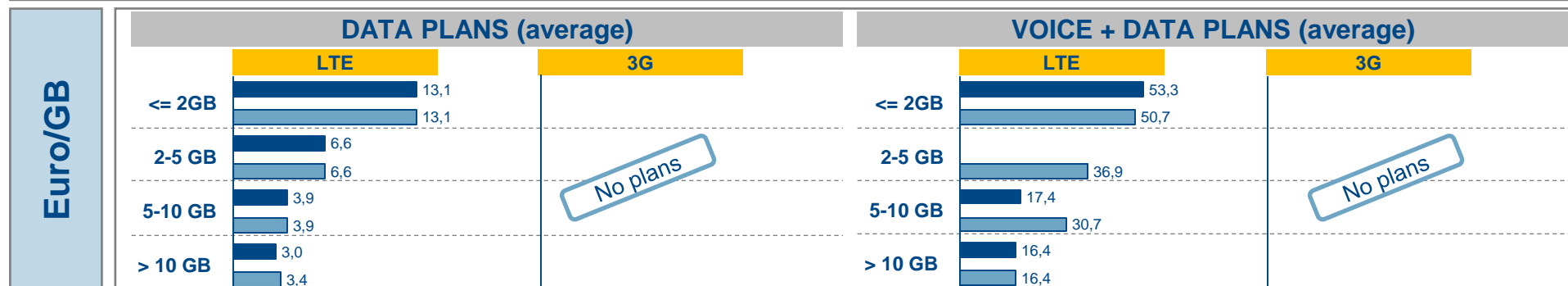
Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
		Omantel 4G Omantel 3G			Omantel 4G Omantel 3G	18.1	18.1	Omantel 4G Omantel 3G			Omantel 4G Omantel 3G	
	Ooredoo 4G Ooredoo 3G	67.4		Ooredoo 4G Ooredoo 3G	26.4	26.4	Ooredoo 4G Ooredoo 3G	No Plans		Ooredoo 4G Ooredoo 3G	No Plans	
Average	4G 3G	67.4		4G 3G	23.6	22.2	4G 3G			4G 3G		

Sample: Omantel, Ooredoo

COUNTRY SUMMARY: main indicators of the country

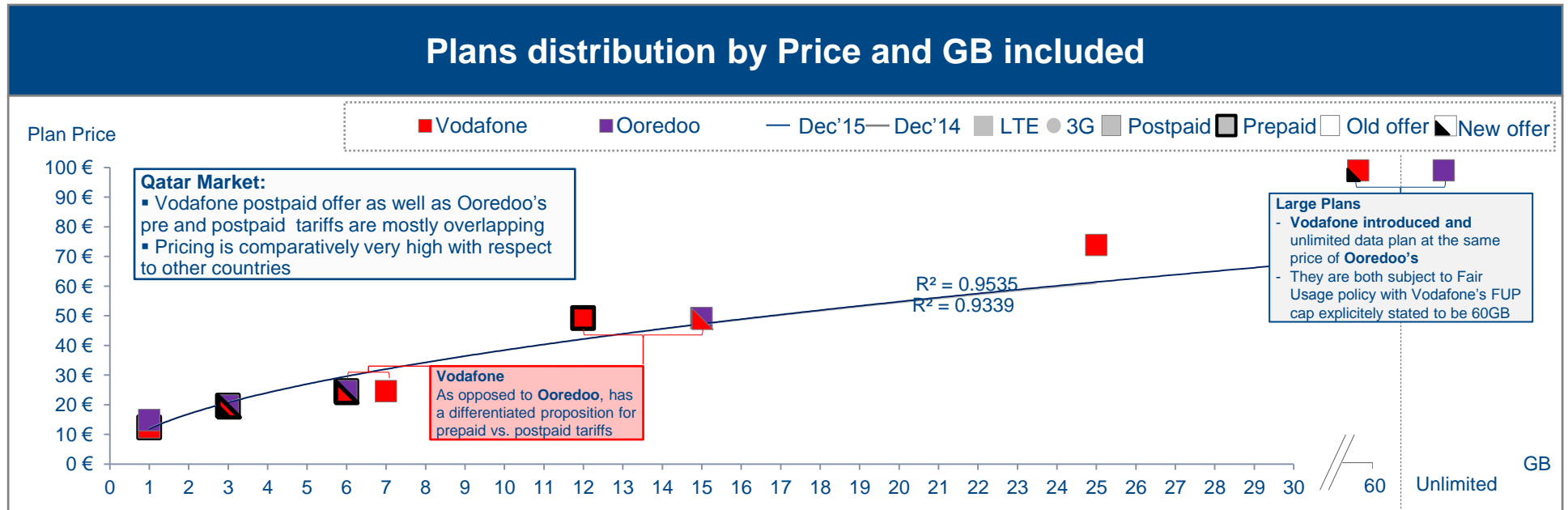


- Dynamic tariff landscape
- Pricing is comparatively very high with respect to other Middle Eastern countries
- Simple offer strategy (Ooredoo) vs. diversified offer strategy (Vodafone - entertainment products included in offers)
- VIP services and priority customer service provided by both Ooredoo and Vodafone



Source: EMIS Intelligence, Arthur D. Little Analysis ■ 2H15 ■ 2H14

DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



66% | 66%
'13 '14

Simple offer strategy:

- Mostly matching Vodafone's strategy
- Overlapping price proposition for pre vs. postpaid offers
- Products across the major data volumes with premium unlimited data offers
- No additional services

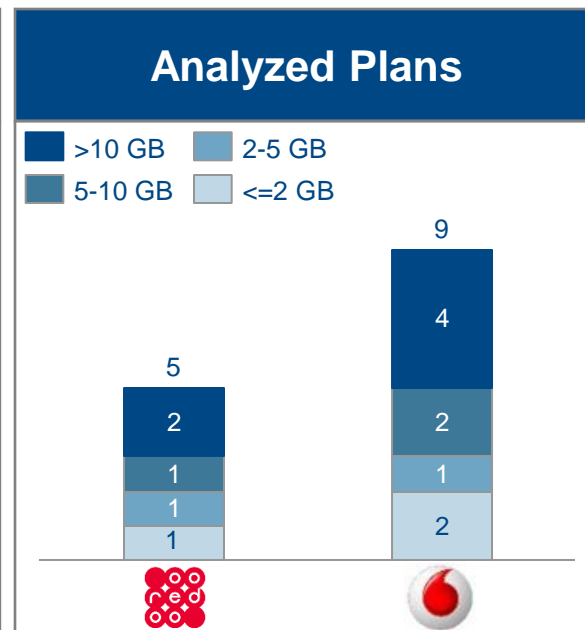
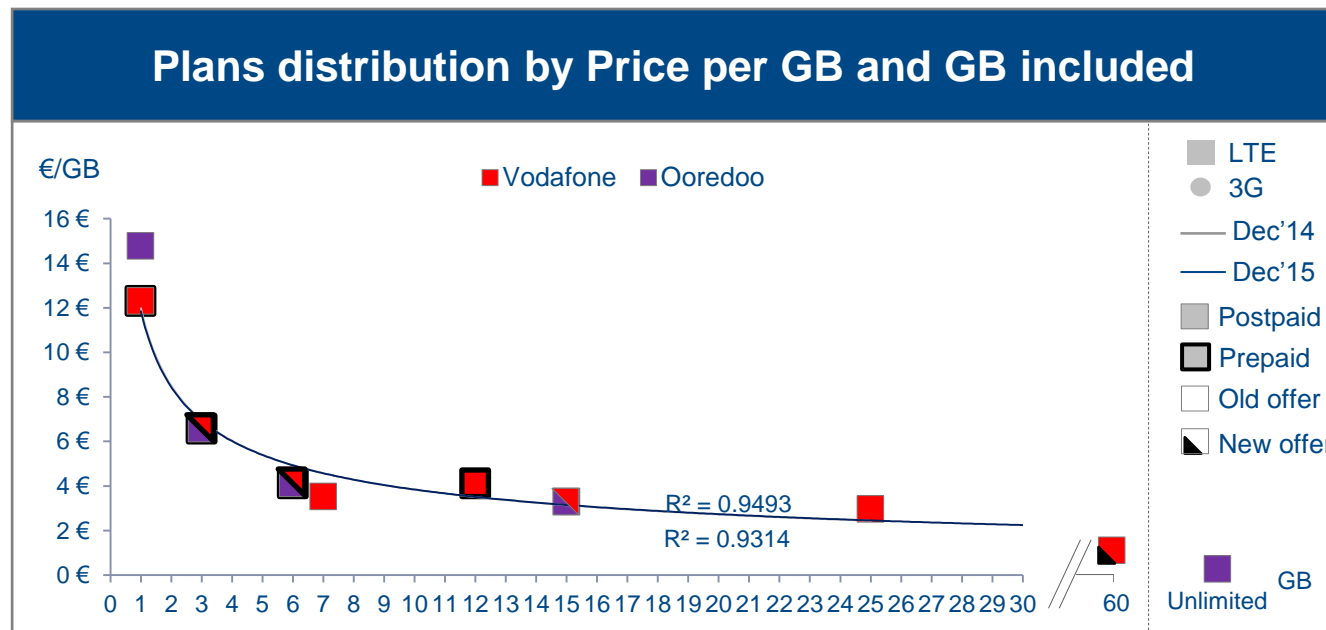


33% | 34%
'13 '14

Diversified offer strategy:

- Mostly matching Ooredoo's strategy
- Different price proposition for pre vs. postpaid offers
- Introduced new "unlimited" data offer
- Products across the major data volumes
- Entertainment products included

DATA PLANS: Price per GB analysis

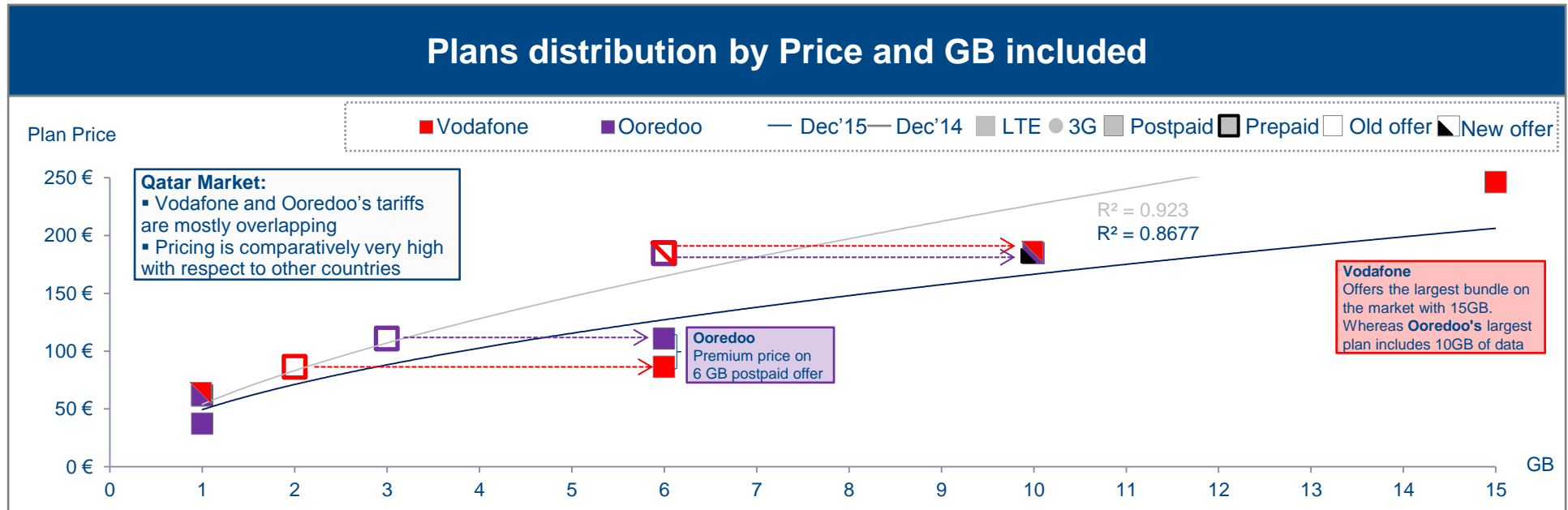


Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
	4G 3G	14.8	14.8	4G 3G	6.6	6.6	4G 3G	4.1	4.1	4G 3G	3.3	3.3
4G 3G	12.3	12.3	4G 3G		6.6	4G 3G	3.8	3.8	4G 3G	3.4	3.0	
Average	13.1	13.1	Average	6.6	6.6	Average	3.9	3.9	Average	3.4	3.0	

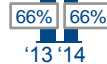
Sample: Ooredoo, Vodafone



VOICE + DATA PLANS with no Unlimited Voice (1.000+ off-net) and Device not included: Strategy, prices and GB included in the offers analysis



Strategy outline



Premium strategy:

- Generally and comparatively very high tariffs, mostly in line or overlapping with Vodafone
- Several VAS and perks including: priority customer service incoming and outbound calls when roaming, etc.
- 10x data promotion for first month of subscription
- Shahry SuperPack entry level plan cheapest "unlimited voice + data" plan on the market



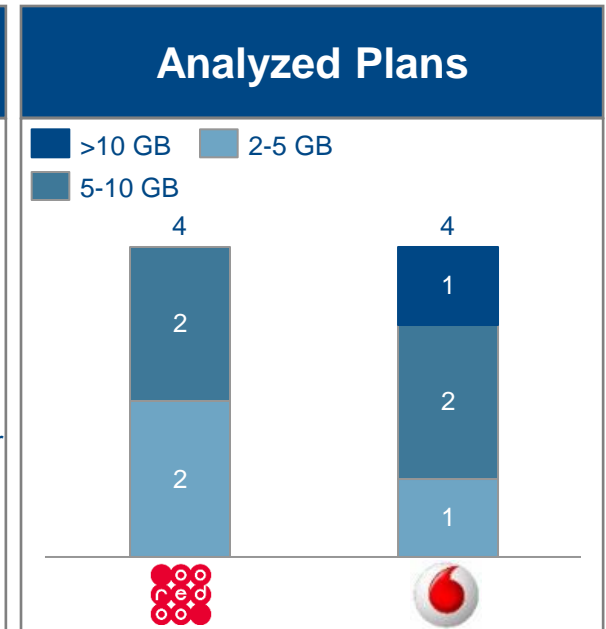
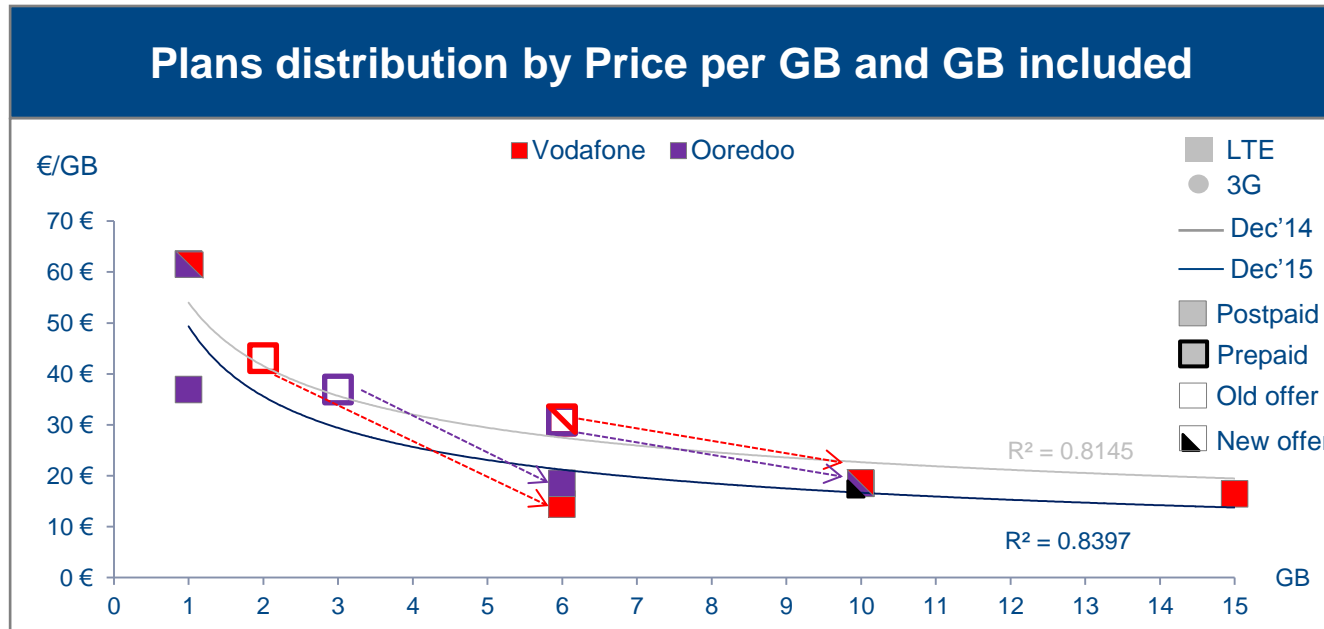
Premium strategy:

- Generally and comparatively very high tariffs, mostly in line or overlapping with Ooredoo
- Several VAS and perks including: star number, family discounts, incoming and outbound calls when roaming, parking valet airport lounge, etc.
- Red VIP most expensive plan on the market with largest allowance and several VIP services (including concierge, etc.)

Sample: Ooredoo, Vodafone



VOICE + DATA PLANS: Price per GB analysis



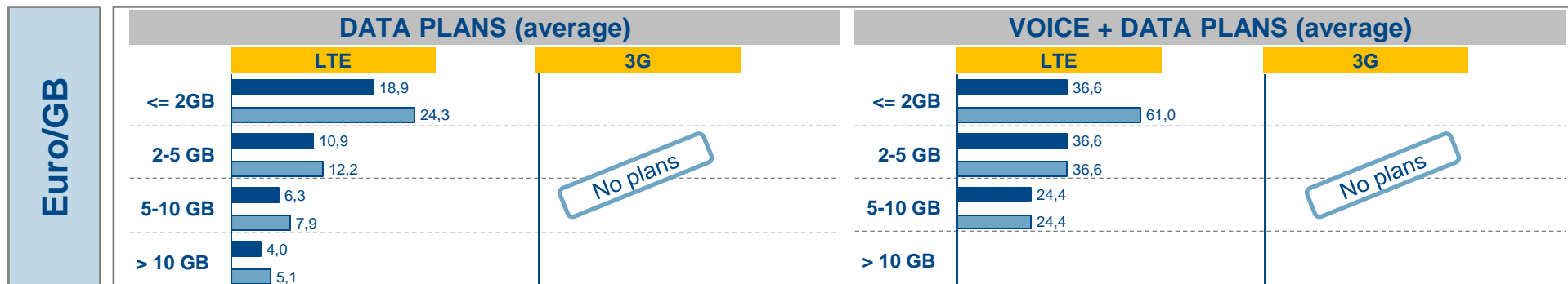
Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans		
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15
Ooredoo	4G	49.2	49.2	4G	36.9		4G	30.7	18.4	4G		
	3G			3G			3G			3G		
Vodafone	4G	52.3	61.5	4G			4G	30.7	16.4	4G	16.4	16.4
	3G			3G			3G			3G		
Average	4G	50.7	53.3	4G	36.9		4G	30.7	17.4	4G	16.4	16.4
	3G			3G			3G			3G		

Sample: Ooredoo, Vodafone

COUNTRY SUMMARY: main indicators of the country

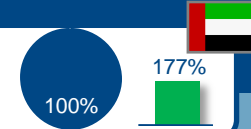


- No full-fledged competition results in operators' plans mostly matching in terms of pricing and data allowances
- Decreasing pricing trend despite tariffs remaining high with respect to different markets
- LTE currently advertised only with data plans (Du: only highest capacity data plan). No 3G vs LTE differentiation.
- Shared data packages available (monetization is through monthly charges for extra SIMs)
- Prices may decrease due to MNP made available in 2014, with both operators stepping up their marketing activities

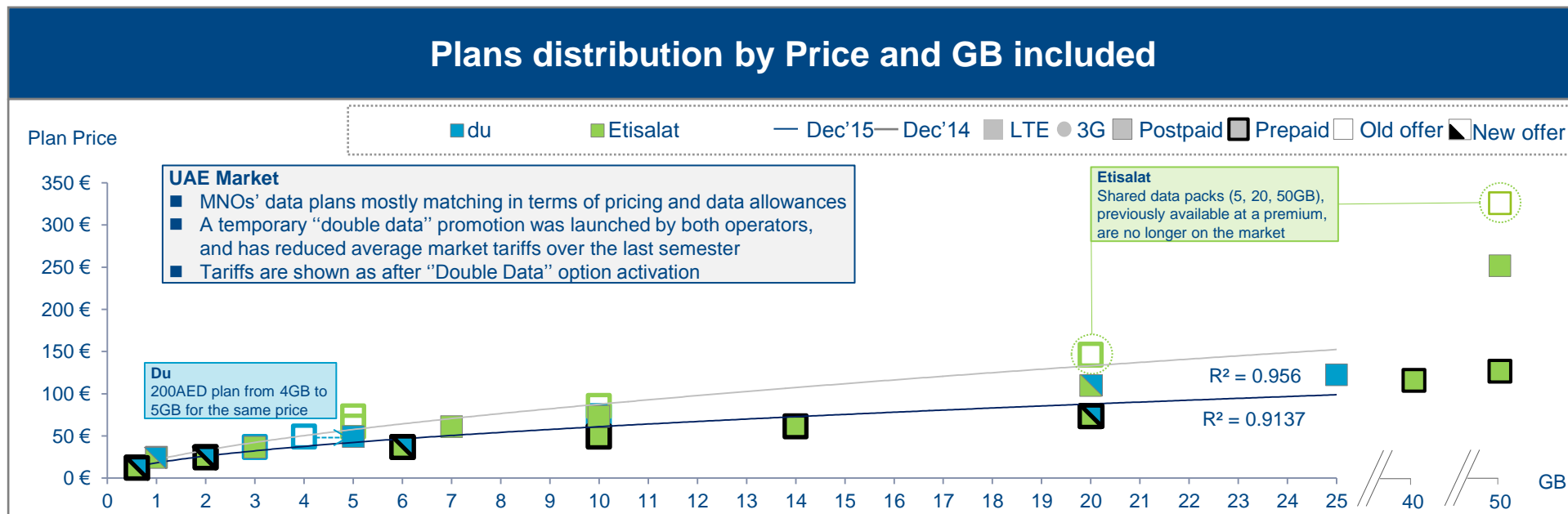


Source: EMIS Intelligence, Arthur D. Little Analysis

■ 2H15 ■ 2H14



DATA PLANS: Strategy, prices and GB included in the offers analysis



Strategy outline



53% '13 54% '14

Competitive price strategy on a wider choice of monthly bundles (13 plans):

- **Postpaid:** 1,3,5,10, 20 and unlimited(FUP 50GB)
- **Prepaid:** 2,6,10,14,20,40,50GB after Double Data
- **"Global data" offer** (unreported) provides roaming data and local Wifi access in addition to local data
- **"Unlimited social" offers** (unreported) priced at 49 AED per month
- **Option to access International eWifi** available

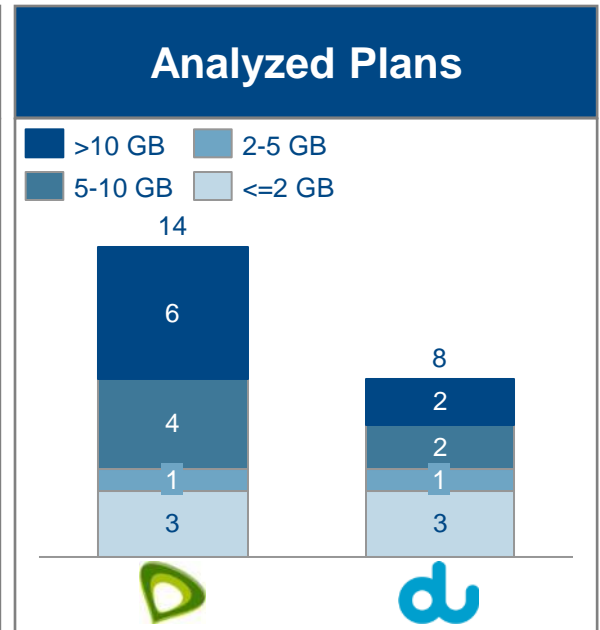
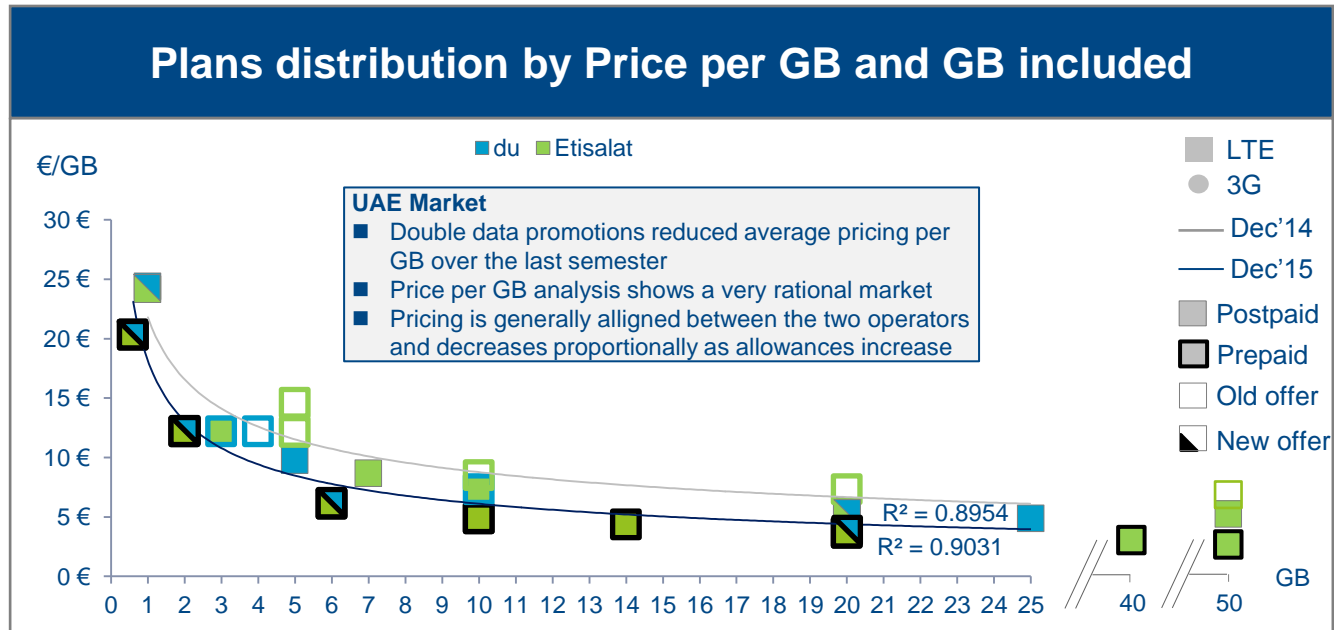


45% '13 46% '14

Competitive price strategy with a smaller choice of monthly bundles (7 plans):

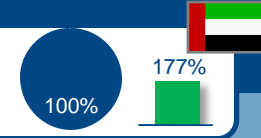
- **Du offers a smaller range of bundles (1,2,5,6, 10,20,25GB) than Etisalat always overlying both in pricing and data allowances**
- **"Unlimited social" offer** (unreported) with uncapped use of facebook, whatsapp and other social apps for only 40AED per month
- **Free cinema tickets & transportation e-ticketing**

DATA PLANS: Price per GB analysis



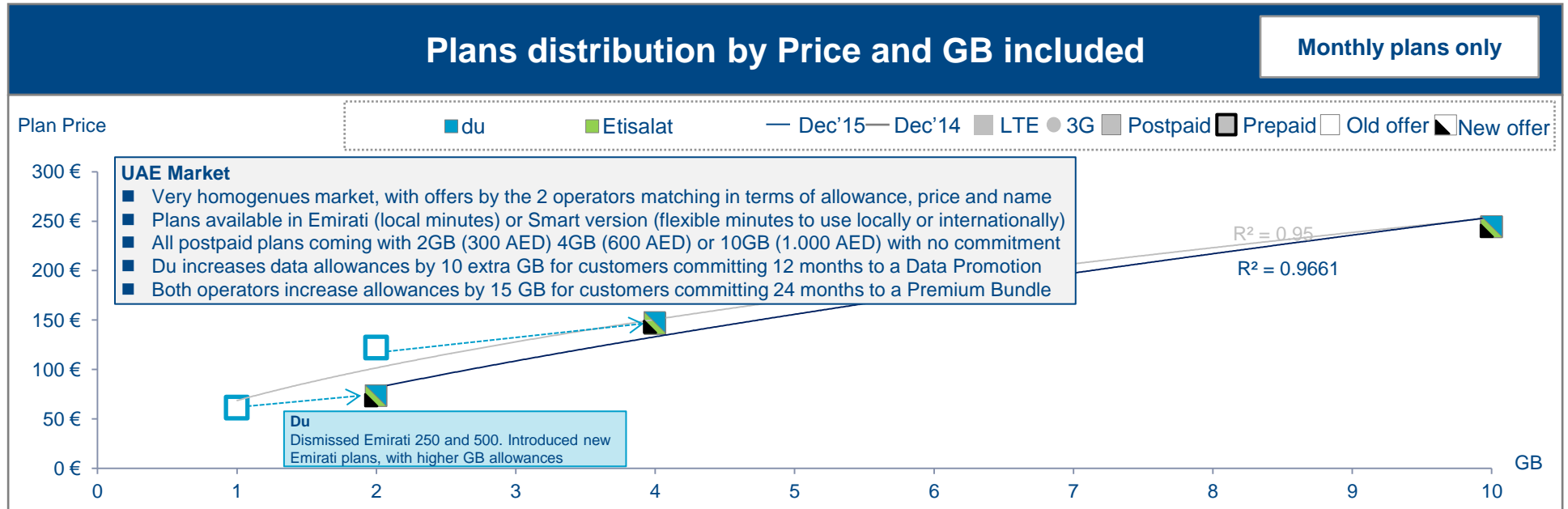
Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans				
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15		
		4G 3G	24.1 18.9			4G 3G	12.1 12.1			4G 3G	8.5 6.7			4G 3G
	4G 3G	24.4 19.0			4G 3G	12.2 9.8			4G 3G	7.3 5.5			4G 3G	4.9 4.3
Average	4G 3G	24.3 18.9		Average	4G 3G	12.2 10.9		Average	4G 3G	7.9 6.3		Average	4G 3G	5.1 4.0

Sample: Du, Etisalat



3 Unites Arab Emirates (UAE) - Voice + Data Plans

VOICE + DATA PLANS with no Unlimited Voice (1.000+ off-net) and Device not included: Strategy, prices and GB included in the offers analysis



Strategy outline

53% | 54%
'13 '14

Competitive price strategy, homogeneous offer with respect to competitor, and two main plan categories:

- Smart Plan, available in the 600 (4GB) and 1000 (10GB) versions and including flexible minutes
- Emirati Plan, same version but including national minute
- Free calls to preferred number 300, 600 or 1.000 minutes depending on the plan
- Other Value Added Services: Vanity Number (with premium bundle and 24 months retention)

45% | 46%
'13 '14

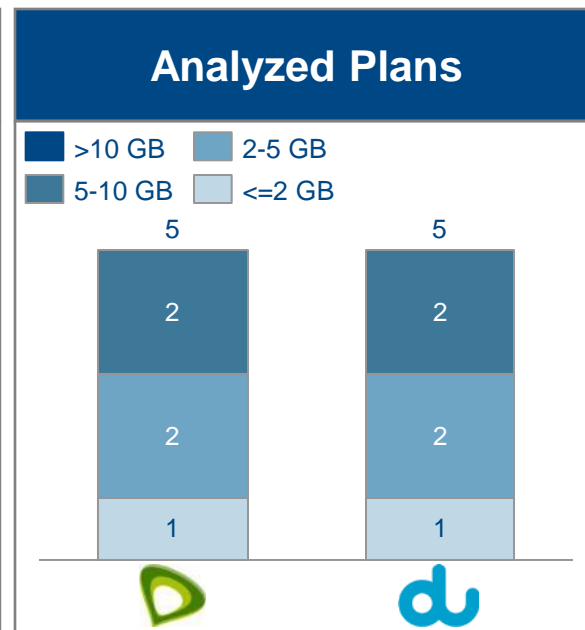
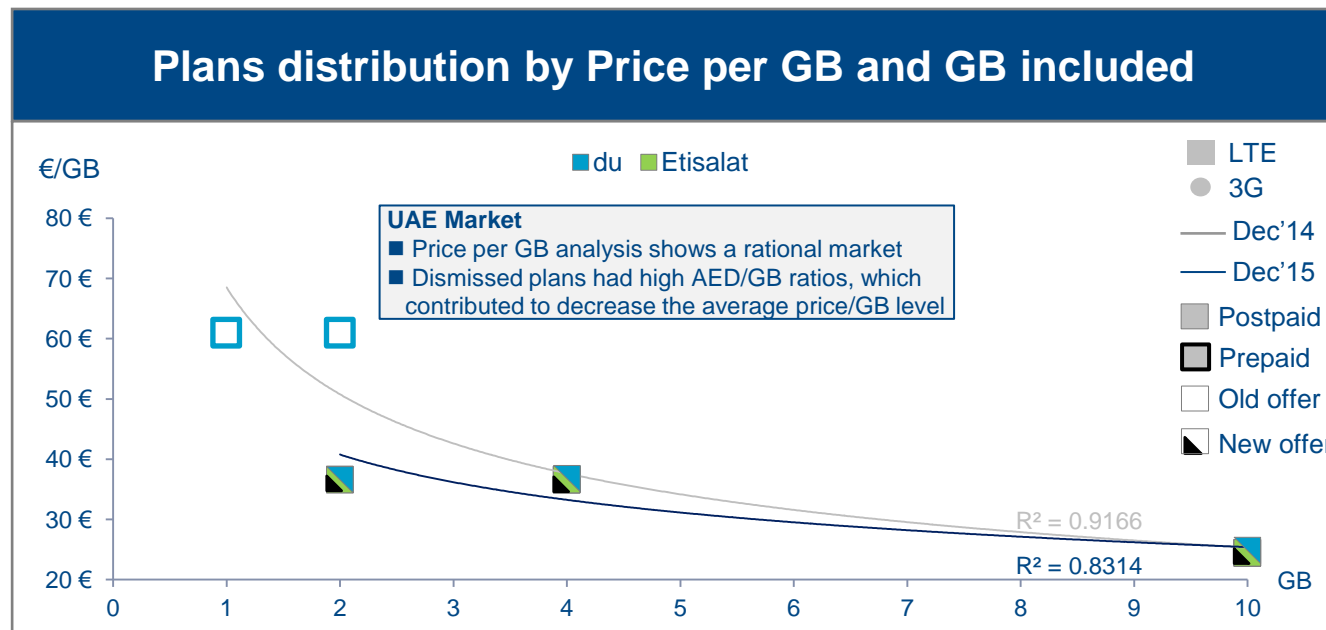
Competitive price strategy, homogeneous offer with respect to competitor, and two main plan categories:

- Smart Plans including 1.200 (Smart 600) or 2.500 (Smart 1000) flexible minutes to use nationally or internationally
- Emirati Plan including 1.200 (Smart 300), 2.400 (Emirati 600) or 5.000 (Emirati 1000) local minutes
- Other VAS: up to 5 extra SIMs (same number); Vanity Number (24 months retention); preferred number minutes
- 10GB-1.000 local min available with 12 mts commitment

Sample: Du, Etisalat



VOICE + DATA PLANS: Price per GB analysis






Euro/GB	<= 2 GB Plans			2-5 GB Plans			5-10 GB Plans			> 10 GB Plans						
	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15	Operator	2H14	2H15				
	4G 3G			36.6	4G 3G			36.6	4G 3G			24.4	4G 3G			
4G 3G			36.6	4G 3G	36.6	36.6	4G 3G	24.4	24.4	4G 3G						
Average	4G 3G	61.0	36.6	Average	4G 3G	36.6	36.6	Average	4G 3G	24.4	24.4	Average	4G 3G			

No plans




Sample: Du, Etisalat

BACKUP





DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	A1 Mobil-Internet Large	5	12,9	12,90	2,58	3G	7 Mbps	Postpaid	Monthly	✗	✗	✗	✗
	A1 Net Cube-Internet S	40	19,9	19,90	0,50	3G	20 Mbps	Postpaid	Monthly	✗	✗	✓	✗
	A1 Net Cube-Internet M	60	29,9	29,90	0,50	4G	50 Mbps	Postpaid	Monthly	✗	✗	✓	✗
	A1 Net Cube-Internet L	100	49,9	49,90	0,50	4G	150 Mbps	Postpaid	Monthly	✗	✗	✓	✗
	A1 Mobil Breitband Premium	35	59,9	59,90	1,71	4G	300 Mbps	Postpaid	Monthly	✗	✗	✗	✗
	MY NET2GO	15	20.99	20.99	1.40	4G	50 Mbps	Postpaid	Monthly	✗	✗	✓	✗
	SURFKLAX 5 GB	5	10.00	10.00	2.00	3G	3,6 Mbps	Prepaid	Monthly	✗	✗	✓	✗
	SURFKLAX 10 GB	10	15.00	15.00	1.50	3G	3,6 Mbps	Prepaid	Monthly	✗	✗	✓	✗
	SURFKLAX LTE	10	15.00	15.00	1.50	4G	10 Mbps	Prepaid	Monthly	✗	✗	✓	✗
	Hui Sim 1 GB	1	4.00	4.00	4.00	3G	4 Mbps	Postpaid	Monthly	✓	✗	✓	✓
	Hui Sim 9 GB	9	9.00	9.00	1.00	3G	4 Mbps	Postpaid	Monthly	✓	✗	✓	✓
	Hui SIM 20GB	20	15.00	15.00	0.75	3G	10 Mbps	Postpaid	Monthly	✓	✗	✓	✓
	Nimm3 Internet 1GB	1	6.00	6.00	6.00	3G	4 Mbps	Prepaid	Monthly	✓	✗	✓	✗
	Nimm3 Internet 6GB	6	12.00	12.00	2.00	3G	8 Mbps	Prepaid	Monthly	✓	✗	✓	✗
	Nimm3 Internet 20GB	20	20.00	20.00	1.00	3G	10 Mbps	Prepaid	Monthly	✓	✗	✓	✗
	Nimm3 Internet Flat	Unlimited	26.00	26.00	-----	3G	10 Mbps	Prepaid	Monthly	✓	✗	✓	✗
	Nimm3 Internet LTE	Unlimited	35.00	35.00	-----	4G	30 Mbps	Prepaid	Monthly	✓	✗	✓	✗





VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	A1 Go! Premium	30	74.90	74.90	2.50	4G	300 Mbps	Postpaid	Monthly	✗	✓	✓	✓
	A1 Go! L	10	54.90	54.90	5.49	4G	150 Mbps	Postpaid	Monthly	✗	✓	✓	✓
	A1 Smart 4G / LTE	10	69.90	69.90	6.99	4G	300 Mbps	Postpaid	Monthly	✗	✓	✗	✗
	A1 Go! M	6	44.90	44.90	7.48	3G	42 Mbps	Postpaid	Monthly	✗	✓	✓	✓
	A1 Go! S	3	34.90	34.90	11.63	3G	21 Mbps	Postpaid	Monthly	✗	✓	✓	✓
	MY MOBILE EXTREME	6	42.99	42.99	7.17	4G	100 Mbps	Postpaid	Monthly	✗	✓	✓	✗
	MY MOBILE TURBO	4	32.99	32.99	8.25	4G	50 Mbps	Postpaid	Monthly	✗	✓	✓	✗
	MY MOBILE LIGHT	2	22.99	22.99	11.50	4G	10 Mbps	Postpaid	Monthly	✗	✓	✓	✗
	HalloSIM Premium	6	40.00	40.00	6.67	4G	150 Mbps	Postpaid	Monthly	✓	✓	✓	✓




DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mobile Broadband 1 GB	1	49	6.57	6.57	4G	150 Mbps	Postpaid	6 Months	✗	✓	✗	✓
	Mobile Broadband 5 GB	5	99	13.27	2.65	4G	150 Mbps	Postpaid	6 Months	✗	✓	✗	✓
	Mobile Broadband 15 GB	15	149	19.97	1.33	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 50 GB	50	249	33.37	0.67	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 300 GB	300	349	46.78	0.16	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 5 GB	5	99	13.27	2.65	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✓
	Mobile Broadband 15 GB	15	169	22.65	1.51	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✓
	Mobile Broadband 100 GB	100	299	40.08	0.40	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✗
	4Life Light	5	99	13.27	2.65	4G	17-71 Mbps	Postpaid	1 Month	✗	✓	✗	✓
	4Life Full	30	199	26.67	0.89	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	4Life Premium	100	299	40.08	0.40	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	4Life Premium Plus	500	399	53.48	0.11	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	2	60	8.04	4.02	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	5	110	14.74	2.95	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	10	130	17.42	1.74	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	100	200	26.81	0.27	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	200	250	33.51	0.17	4G	8-35 Mbps	Postpaid	6 Months	✓	✓	✗	✓




VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mobile Broadband 1 GB	1	49	6.57	6.57	4G	150 Mbps	Postpaid	6 Months	✗	✓	✗	✓
	Mobile Broadband 5 GB	5	99	13.27	2.65	4G	150 Mbps	Postpaid	6 Months	✗	✓	✗	✓
	Mobile Broadband 15 GB	15	149	19.97	1.33	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 50 GB	50	249	33.37	0.67	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 300 GB	300	349	46.78	0.16	4G	150 Mbps	Postpaid	6 Months	✓	✓	✓	✓
	Mobile Broadband 5 GB	5	99	13.27	2.65	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✓
	Mobile Broadband 15 GB	15	169	22.65	1.51	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✓
	Mobile Broadband 100 GB	100	299	40.08	0.40	4G	17-71 Mbps	Postpaid	6 Months	✓	✗	✗	✗
	4Life Light	5	99	13.27	2.65	4G	17-71 Mbps	Postpaid	1 Month	✗	✓	✗	✓
	4Life Full	30	199	26.67	0.89	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	4Life Premium	100	299	40.08	0.40	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	4Life Premium Plus	500	399	53.48	0.11	4G	17-71 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	2	60	8.04	4.02	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	5	110	14.74	2.95	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	10	130	17.42	1.74	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	100	200	26.81	0.27	4G	8-35 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Bredbånd	200	250	33.51	0.17	4G	8-35 Mbps	Postpaid	6 Months	✓	✓	✗	✓

DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Bbox Nomad 6Go	6	14.90	14.90	2.48	4G		Postpaid	1 Month	✓	✓	✓	✓
	Bbox Nomad 26 Go	16	24.90	24.90	1.56	4G		Postpaid	1 Month	✓	✓	✓	✓
	Bbox Nomad 32 Go	32	39.90	39.90	1.25	4G		Postpaid	1 Month	✓	✓	✓	✓
	Bbox Nomad Prépayée	6	30.00	30.00	5.00	4G		Prepaid	1 Month	✓	✗	✗	✗
	Let's go 2 Go	2	9.99	9.99	5.00	4G	223 Mbps	Postpaid	1 Month	✓	✓	✓	✗
	Let's go 8 Go	8	24.99	24.99	3.12	4G	223 Mbps	Postpaid	1 Month	✓	✓	✓	✗
	Let's go 20 Go	20	54.99	54.99	2.75	4G	223 Mbps	Postpaid	1 Month	✓	✓	✓	✗
	la pochette prêt à surfer	2	14.90	14.90	7.45	4G	223 Mbps	Prepaid	1 Month	✗	✗	✓	✗
	Connecté Partout Starter 1Go	1	7.99	7.99	7.99	4G		Postpaid	1 Month	✓	✓	✓	✗
	Connecté Partout Starter 5Go	5	14.99	14.99	3.00	4G		Postpaid	12 Months	✓	✓	✓	✗
	Connecté Partout Starter 10Go	10	19.99	19.99	2.00	4G		Postpaid	24 Months	✗	✗	✗	✗
	Connecté Partout Starter 15Go	15	39.99	39.99	2.67	4G		Postpaid	24 Months	✗	✗	✗	✗

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	B&You 24/24 3Go	3	19.99	19.99	6.66	4G		Postpaid	1 Month	✓	✓	✓	✗
	B&You 24/24 5Go	5	29.99	29.99	6.00	4G		Postpaid	1 Month	✓	✓	✓	✗
	B&You 24/24 10Go	10	39.99	39.99	4.00	4G		Postpaid	1 Month	✓	✓	✓	✗
	B&You 24/24 40Go	40	69.99	69.99	1.75	4G		Postpaid	1 Month	✓	✓	✓	✓
<i>free</i>	forfait 19,99€ sans engagement	50	19.99	19.99	0.40	4G		Postpaid	1 Month	✗	✓	✗	✗
	Origami Zen	1	24.99	24.99	24.99	4G	223 Mbps	Postpaid	12 Months	✓	✓	✓	✗
	Origami Play 4GB SIM	4	32.99	32.99	8.25	4G	223 Mbps	Postpaid	12 Months	✓	✓	✓	✓
	Origami Play 8GB SIM	8	39.99	39.99	5.00	4G	223 Mbps	Postpaid	12 Months	✓	✓	✓	✓
	Origami Jet 12GB SIM	12	49.99	49.99	4.17	4G	223 Mbps	Postpaid	12 Months	✓	✓	✓	✓
	Origami Jet 20GB SIM	20	69.99	69.99	3.50	4G	223 Mbps	Postpaid	12 Months	✓	✓	✓	✓
	Sosh forfait 19,99€	3	19.99	19.99	6.66	4G		Postpaid	1 Month	✗	✓	✗	✗
	Sosh forfait 24,99€	5	24.99	24.99	5.00	4G		Postpaid	1 Month	✗	✓	✗	✗
	Forfaits Starter 1Go	1	19.99	19.99	19.99	4G	112,5 Mbits/s	Postpaid	12 Months	✗	✓	✓	✗
	Forfaits Power 5Go	5	28.99	28.99	5.80	4G	112,5 Mbits/s	Postpaid	12 Months	✓	✓	✓	✓
	Forfaits Power 10Go	10	41.99	41.99	4.20	4G	112,5 Mbits/s	Postpaid	12 Months	✓	✓	✓	✓
	Forfaits Premium 15Go	15	69.99	69.99	4.67	4G	112,5 Mbits/s	Postpaid	12 Months	✓	✓	✓	✓
	Red 3Go->6Go	6	19.99	19.99	3.33	4G	112,5 Mbits/s	Postpaid	1 Month	✗	✓	✓	✗
	Red 5Go->10Go	10	25.99	25.99	2.60	4G	112,5 Mbits/s	Postpaid	1 Month	✗	✓	✗	✗

DATA PLANS: Analyzed plan detail



Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
O ₂	O2 Go + Surf Flat M	1	12,99	12,99	12,99	4G	7.2 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	O2 Go + Surf Flat L	5	24,99	24,99	5,00	4G	7.2 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	O2 Go + Surf Flat XL	7,5	34,99	34,99	4,67	4G	21.1 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	O2 Go + Surf Flat XXL	10	44,99	44,99	4,50	4G	50 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	O2 Go Prepaid M	1	14,99	14,99	14,99	3G	14.4 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	O2 Go Prepaid L	5	24,99	24,99	5,00	3G	21.1 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	O2 Go Prepaid XL	7,5	34,99	34,99	4,67	3G	21.1 Mbps	Prepaid	1 Month	✗	✗	✗	✗
e-plus+	Internet L Plus (Music)	0,75	15,00	15,00	20,00	3G	7.2 Mbps	Postpaid	24 Months	✓	✗	✗	✗
	Internet L	1	15,00	15,00	15,00	3G	7.2 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	Internet XL Plus (Music)	2	20,00	20,00	10,00	3G	7.2 Mbps	Postpaid	24 Months	✓	✗	✗	✗
	Internet XL	5	20,00	20,00	4,00	3G	7.2 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	Internet XXL Plus (Music)	5	25,00	25,00	5,00	3G	7.2 Mbps	Postpaid	24 Months	✓	✗	✓	✗
T-Mobile	Data Comfort S	1	14,95	14,95	14,95	4G	150 Mbps	Postpaid	24 Months	✓	✓	✗	✗
	Data Comfort M	2	19,95	19,95	9,98	4G	150 Mbps	Postpaid	24 Months	✓	✓	✗	✗
	Data Comfort L	5	29,95	29,95	5,99	4G	300 Mbps	Postpaid	24 Months	✓	✓	✗	✗
vodafone	DataGo S	1	14,99	14,99	14,99	4G	225 Mbps	Postpaid	24 Months	✓	✗	✗	✗
	DataGo M	3	19,99	19,99	6,66	4G	225 Mbps	Postpaid	24 Months	✓	✗	✗	✗
	DataGo L	6	29,99	29,99	5,00	4G	225 Mbps	Postpaid	24 Months	✓	✗	✗	✗
	WebSessions S	1	14,99	14,99	14,99	3G	7.2 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	WebSessions M	3	24,99	24,99	8,33	3G	7.2 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	WebSessions L	5	34,99	34,99	7,00	3G	7.2 Mbps	Prepaid	1 Month	✗	✗	✗	✗

Sample: T-Mobile, Vodafone, E-plus, O2
 Note: Tariffs updated to end of October 2015




VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
O ₂	All-in M	1	26.99	26.99	26.99	4G	21,1 Mbps	Postpaid	24 Months	✗	✗	✗	✗
	All-in L	3	35.99	35.99	12.00	4G	50 Mbps	Postpaid	24 Months	✗	✓	✗	✓
	All-in XL	5	44.99	44.99	9.00	4G	50 Mbps	Postpaid	24 Months	✗	✓	✗	✓
	All-in Premium	10	71.99	71.99	7.20	4G	50 Mbps	Postpaid	24 Months	✗	✓	✓	✓
	O2 Loop Smart All-in 2GB	2	39.99	39.99	20.00	3G	7,2 Mbps	Prepaid	1 Month	✗	✗	✗	✓
	O2 Loop Smart All-in 5GB	5	49.99	49.99	10.00	3G	21,1 Mbps	Prepaid	1 Month	✗	✗	✗	✓
e-plus ⁺	BASE All In	1	25.00	25.00	25.00	3G	7,2 Mbps	Postpaid	24 Months	✗	✗	✓	✗
	BASE All-In Plus	2	35.00	35.00	17.50	3G	7,2 Mbps	Postpaid	24 Months	✓	✗	✓	✗
T-Mobile	MagentaMobil M	2	39.95	39.95	19.98	4G	150 Mbps	Postpaid	24 Months	✓	✓	✗	✗
	MagentaMobil L	4	49.95	49.95	12.49	4G	300 Mbps	Postpaid	24 Months	✓	✓	✗	✗
	MagentaMobil L Plus	10	79.95	79.95	8.00	4G	300 Mbps	Postpaid	24 Months	✓	✓	✗	✓
vodafone	Vodafone Red 1.5 GB (+ free 0.5GB promotion)	2	32.49	32.49	16.25	4G	225 Mbps	Postpaid	24 Months	✓	✓	✓	✗
	Vodafone Red 3 GB (+ free 1GB promotion)	4	42.49	42.49	10.62	4G	225 Mbps	Postpaid	24 Months	✓	✓	✓	✗
	Vodafone Red 8 GB	8	62.49	62.49	7.81	4G	225 Mbps	Postpaid	24 Months	✓	✓	✓	✗
	Vodafone Red 20 GB	20	87.49	87.49	4.37	4G	225 Mbps	Postpaid	24 Months	✓	✓	✓	✗





DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Bill Pay Broadband 3GB 3G	3.00	12.99	12.99	4.33	3G		Postpaid	12/18 Mts	x	x	x	x
	Bill Pay Broadband 3GB 4G	3.00	17.98	17.98	5.99	4G		Postpaid	12/18 Mts	x	x	x	x
	Bill Pay Broadband 20GB	20.00	26.99	26.99	1.35	4G		Postpaid	12/18 Mts	x	x	x	x
	Bill Pay Broadband 60GB	60.00	39.99	39.99	0.67	4G		Postpaid	12/18 Mts	x	x	x	x
	Bill Pay Broadband 100GB	100.00	54.99	54.99	2.75	4G		Postpaid	12/18 Mts	x	x	x	x
	Bill Pay Broadband 250GB	250.00	69.99	69.99	0.28	4G		Postpaid	12/18 Mts	x	x	x	x
	Prepay Broadband 1GB	1.00	15.00	15.00	15.00	3G		Prepaid	1 Month	x	x	x	x
	Prepay Broadband 7.5GB	7.50	25.00	25.00	3.33	3G		Prepaid	1 Month	x	x	x	x
	Prepay Broadband 20GB	20.00	35.00	35.00	1.75	3G		Prepaid	1 Month	x	x	x	x
	Prepay Broadband 1GB 4G	1.00	19.99	19.99	19.99	4G		Prepaid	1 Month	x	x	x	x
	Prepay Broadband 7.5GB 4G	7.50	29.99	29.99	4.00	4G		Prepaid	1 Month	x	x	x	x
Prepay Broadband 20GB 4G	20.00	39.99	39.99	2.00	4G		Prepaid	1 Month	x	x	x	x	
vodafone	Mobile Broadband 1GB	1.00	7.99	7.99	7.99	3G		Postpaid	1 Month	x	x	x	x
	Mobile Broadband 10GB	10.00	19.99	19.99	2.00	3G		Postpaid	1 Month	x	x	x	x
	Performance Pro	10.00	29.99	29.99	3.00	3G		Postpaid	12 Months	x	x	x	x
	Simply 4G	15.00	24.99	24.99	1.67	4G		Postpaid	12/18/24 Mt	x	x	x	x
	Performance 4G	20.00	29.99	29.99	1.50	4G		Postpaid	12/18/24 Mt	x	x	x	x
	Pay As You Go	7.50	20.00	20.00	2.67	4G		Prepaid	1 Month	x	x	x	x
	Bill Pay Plan 3G 5GB	5.00	17.27	17.27	3.45	3G		Postpaid	12 Months	x	x	x	x
	Bill Pay Plan 3G 20GB	20.00	20.32	20.32	1.02	3G		Postpaid	1 Month	x	x	x	x
	Bill Pay Plan 4G 15GB	15.00	14.99	14.99	1.00	4G		Postpaid	1 Month	x	x	x	x
	Bill Pay Plan 4G XL 20GB	20.00	19.99	19.99	1.00	4G		Postpaid	6 Months	x	x	x	x
	Bill Pay Plan 4G XXL 30GB	30.00	23.99	23.99	0.80	4G		Postpaid	6 Months	x	x	x	x
	30 Day Pass	7.50	19.99	19.99	2.67	4G		Prepaid	1 Month	x	x	x	x

VOICE + DATA PLANS: Analyzed plan detail





Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Flex-Max SIM Only	15.00	44.74	44.74	2.98	- 4G		Postpaid	1 Month	✗	✗	✗	✗
	Free 4G and All You Can Eat Data	15.00	24.99	24.99	1.67	- 4G		Prepaid	1 Month	✗	✗	✗	✗
	Super 4G	5.00	24.00	24.00	4.80	- 4G		Postpaid	1 Month	✓	✗	✗	✗
	Simo Super Deluxe 4G	15.00	31.20	31.20	2.08	- 4G		Postpaid	1 Month	✓	✓	✗	✗
	Simplicity	7.50	30.00	30.00	4.00	- 4G		Prepaid	1 Month	✓	✗	✗	✗
	Red 30 Day	1.00	30.00	30.00	30.00	- 4G		Postpaid	1 Month	✗	✓	✗	✓
	RED 12 Month	5.00	35.00	35.00	7.00	- 4G		Postpaid	12 Months	✗	✓	✗	✓

DATA PLANS: Analyzed plan detail




Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Internet Start	2	10	10.00	10.00	4G	225 Mbps	Post/Pre	1 Month	✓	✗	✓	✓
	Internet Large	5	20	20.00	20.00	4G	225 Mbps	Post/Pre	1 Month	✓	✗	✓	✓
	Internet XL	10	30	30.00	30.00	4G	225 Mbps	Post/Pre	1 Month	✓	✗	✓	✓
	Giga Start	5	10	10.00	10.00	4G	225 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Giga Extra	10	20	20.00	20.00	4G	225 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Giga Maxi	20	30	30.00	30.00	4G	225 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Giga Start	2.5	10	10.00	10.00	4G	225 Mbps	Prepaid	1 Month	✓	✗	✓	✗
	Giga Extra	5	20	20.00	20.00	4G	225 Mbps	Prepaid	1 Month	✓	✗	✓	✗
	Giga Maxi	10	30	30.00	30.00	4G	225 Mbps	Prepaid	1 Month	✓	✗	✓	✗
	Internet 4 GIGA	4	9	9.00	9.00	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Internet 8 GIGA	8	14	14.00	14.00	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Internet 14 GIGA	14	19	19.00	19.00	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Internet No Stop	1	5	5.00	5.00	4G	150 Mbps	Prepaid	1 Month	✗	✗	✓	✗
	Internet No Stop Large	2	7.5	7.50	7.50	4G	150 Mbps	Prepaid	1 Month	✗	✗	✓	✗
	Open Internet 3 GIGA	3	9	9.00	9.00	4G	150 Mbps	Prepaid	1 Month	✗	✗	✓	✓
	Open Internet 6 GIGA	6	14	14.00	14.00	4G	150 Mbps	Prepaid	1 Month	✗	✗	✓	✓
	Open Internet 12 GIGA	12	19	19.00	19.00	4G	150 Mbps	Prepaid	1 Month	✗	✗	✓	✓
	Super Internet Plus	4	5	5.00	5.00	4G	100 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Web Night	8	15	15.00	15.00	4G	100 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Web Night & Day	30	20	20.00	20.00	4G	100 Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Super Internet Extra	3	5	5.00	5.00	4G	100 Mbps	Prepaid	1 Month	✓	✗	✓	✗

Sample: 3 ITA, Vodafone, TIM, Wind
 Note: Tariffs updated to end of October 2015

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	TIM Special Unlimited	4	40	40.00	10.00	4G	225 Mbps	Prepaid/ Postpaid	1 Month	✓	✓	✓	✗
	RELAX No Tax	3	34	34.00	11.33	4G	225Mbps	Postpaid	12 Months	✗	✗	✓	✗
	RELAX Completo Family Edition	5	75	75.00	15.00	4G	225Mbps	Postpaid	12 Months	✗	✓	✓	✓
	Magnum 2 Giga	2	24	24.00	12.00	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Magnum 4 Giga	4	29	29.00	7.25	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Magnum 8 Giga	8	35	35.00	4.38	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Magnum 14 Giga	14	40	40.00	2.86	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	ALL-IN ONE (family)	2	10	10.00	5.00	4G	100 Mbps	Prepaid	30 Month	✓	✓	✓	✗
	ALL-IN ONE	2	20	20.00	10.00	4G	100 Mbps	Prepaid	30 Months	✓	✓	✓	✗
	ALL-IN ONE	2	30	30.00	15.00	4G	100 Mbps	Prepaid	1 Month	✓	✓	✓	✗
	FULL Unlimited	4	20	20.00	5.00	4G	100 Mbps	Postpaid	12 Months	✓	✓	✓	✗
	FULL Unlimited Plus	8	25	25.00	3.13	4G	100 Mbps	Postpaid	12 Months	✓	✓	✓	✗

DATA PLANS: Analyzed plan detail





Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mobile Internet Entry	1.00	17.50	17.50	17.50	4G		Postpaid	12 Months	✗	✓	✗	✗
	Mobile Internet Standard	5.00	22.50	22.50	4.50	4G		Postpaid	12 Months	✗	✓	✗	✗
	Mobile Internet Premium	10.00	32.50	32.50	3.25	4G		Postpaid	12 Months	✗	✓	✗	✗
	KPN Maandtegoed 1 GB	1.00	16.00	16.00	16.00	3G		Prepaid	31 days	✗	✓	✗	✗
	Start	1.00	15.00	15.00	15.00	4G	225 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Basis	3.00	20.50	20.50	6.83	4G	225 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Extra	8.00	31.00	31.00	3.88	4G	225 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	1GB prepaid data	1.00	17.50	17.50	17.50	3G	43.2 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Subscription 1GB	1.00	14.50	14.50	14.50	4G	100 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Subscription 3GB	3.00	17.50	17.50	5.83	4G	100 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Subscription 6GB	6.00	24.50	24.50	4.08	4G	150 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Subscription 12GB	12.00	32.50	32.50	2.71	4G	150 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Internet Month	1.00	9.95	9.95	9.95	3G	15 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Internet Month Xtra	1.50	14.95	14.95	9.97	3G	15 Mbps	Prepaid	1 Month	✗	✗	✗	✗

VOICE + DATA PLANS: Analyzed plan detail





Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
kpn	Carefree Entry (12 months)	1.00	32.50	32.50	32.50	4G	225 Mbit	Postpaid	12 Months	✗	✓	✗	✗
	Carefree Standard (12 months)	5.00	37.50	37.50	7.50	4G	225 Mbit	Postpaid	12 Months	✗	✓	✗	✗
	Carefree Premium + Spotify (12 months)	10.00	42.50	42.50	4.25	4G	225 Mbit	Postpaid	12 Months	✓	✓	✗	✗
vodafone	Red	3.00	31.00	31.00	10.33	4G	225 Mbps	Postpaid	12 Months	✗	✗	✗	✗
	Red Super	7.00	37.00	37.00	5.29	4G	225 Mbps	Postpaid	12 Months	✗	✗	✗	✓
T-Mobile	Subscription 1GB (12 months)	1.00	27.00	27.00	27.00	4G	100 MBps	Postpaid	12 Months	✓	✗	✗	✓
	Subscription 3GB (12 months)	3.00	29.00	29.00	9.67	4G	100 MBps	Postpaid	12 Months	✓	✗	✗	✓
	Subscription 6GB (12 months)	6.00	33.00	33.00	5.50	4G		Postpaid	12 Months	✓	✗	✗	✓
	Subscription 12GB (12 months)	12.00	38.50	38.50	3.21	4G	120 MBps	Postpaid	12 Months	✓	✗	✗	✓
TELE2	SIM Only Abonnement 1GB	1.00	20.00	20.00	20.00	4G		Postpaid	12 Months	✗	✗	✗	✗
	SIM Only Abonnement 2GB	2.00	25.00	25.00	12.50	4G		Postpaid	12 Months	✗	✗	✗	✗
	SIM Only Abonnement 4GB	4.00	35.00	35.00	8.75	4G		Postpaid	12 Months	✗	✗	✗	✗

Since our study, Tele2 has begun to decrease its sim only subscriptions by up to 50%, shifting its focus to providing more data for their customers





DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Vive 12	1	12.00	12.00	12	4G	7.2 Mbps	Postpaid	NA	✗	✗	✗	✗
	Internet Tablet 1 GB	1	11.00	11.00	11	4G	300 Mbps	Postpaid	NA	✗	✗	✓	✓
	Internet Tablet 3.2 GB	3.2	24.00	24.00	7.5	4G	300 Mbps	Postpaid	NA	✗	✗	✓	✓
	Internet Tablet 6 GB	6	30.00	30.00	5	4G	300 Mbps	Postpaid	NA	✗	✗	✓	✓
	Internet Tablet 10 GB	10	42.00	42.00	4.2	4G	300 Mbps	Postpaid	NA	✗	✗	✓	✓
	Bono mensual 750 MB	0.75	10.00	10.00	13.3	4G	150 Mbps	Prepaid	NA	✗	✓	✓	✗
	Bono mensual 1.5 GB	1.5	15.00	15.00	10	4G	150 Mbps	Prepaid	NA	✗	✗	✓	✗
	Internet Móvil 1GB	1	10.89	10.89	10.89	4G	42 Mbps	Postpaid	NA	✗	✗	✗	✗
	Internet Móvil 5GB	5	24.95	24.95	4.99	4G	42 Mbps	Postpaid	NA	✗	✗	✗	✗
	La del Cero 1,2GB	1.2	11.00	11.00	9.17	4G	75Mbps	Postpaid	NA	✗	✗	✗	✗





VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Vive 33	2.5	33.00	33.00	13.20	4G	7.2 Mbps	Prepaid / Postpaid	NA	✓	✗	✓	✗
	Vive 45	5	45.00	45.00	9.00	4G	7.2 Mbps	Prepaid / Postpaid	NA	✓	✗	✓	✗
	Red M	3	33.00	33.00	11.00	4G	300 Mbps	Postpaid	NA	✓	✗	✓	✗
	Red L	5	42.00	42.00	8.40	4G	300 Mbps	Postpaid	NA	✓	✗	✓	✗
	Red XL	8	59.00	59.00	7.38	4G	300 Mbps	Postpaid	NA	✓	✓	✓	✓
	Delfin	2.5	30.95	30.95	12.38	4G		Postpaid	12 Months	✗	✓	✓	✓
	Ballena	5	39.95	39.95	7.99	4G		Postpaid	12 Months	✗	✓	✓	✓
	La Sinfin 8 GB	8	29.00	29.00	3.63	4G	75Mbps	Postpaid	NA	✗	✗	✗	✗





DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
 Telia	Telia Mobilt bredband 6 GB	6	99	10.57	1.76	4G	100 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Telia Mobilt bredband 20 GB	20	199	21.24	1.06	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✗
	Telia Mobilt bredband 40 GB	40	299	31.92	0.80	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✗
 TELE2	Broadband 4G	5	99	10.57	2.11	4G		Postpaid	1 Month	✓	✗	✗	✗
	Broadband 4G	20	149	15.91	0.80	4G		Postpaid	1 Month	✓	✗	✗	✗
	Broadband 4G	50	249	26.58	0.53	4G		Postpaid	1 Month	✓	✗	✗	✗
	Broadband 4G	100	399	42.59	0.43	4G		Postpaid	1 Month	✓	✗	✗	✗
 telenor	Mobilt bredband	40	249	26.58	0.66	4G	100 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	1	99	10.57	10.57	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	5	119	12.70	2.54	3G	32 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	5	149	15.91	3.18	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	15	169	18.04	1.20	3G	32 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	15	199	21.24	1.42	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	40	369	39.39	0.98	3G	32 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	40	399	42.59	1.06	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	60	469	50.06	0.83	3G	32 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	60	499	53.27	0.89	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	200	799	85.29	0.43	3G	32 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3Bredband	200	829	88.49	0.44	4G	64 Mbps	Postpaid	1 Month	✗	✗	✗	✗

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mobil komplett	4	299	31.92	7.98	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Mobil komplett	12	399	42.59	3.55	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Mobil komplett	24	499	53.27	2.22	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Mobil komplett	40	599	63.94	1.60	4G	100 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Mobile subscription and data	5	248	26.47	5.29	4G		Postpaid	1 Month	✓	✗	✗	✗
	Mobile subscription and data	20	298	31.81	1.59	4G		Postpaid	1 Month	✓	✗	✗	✗
	Mobile subscription and data	50	398	42.49	0.85	4G		Postpaid	1 Month	✓	✗	✗	✗
	Mobile subscription and data	100	548	58.50	0.58	4G		Postpaid	1 Month	✓	✗	✗	✗
	Mobil 2 GB (+2GB promotion)	4	299	31.92	7.98	4G	100 Mbps	Postpaid	1 Month	✗	✓	✓	✓
	Mobil 12 GB	12	399	42.59	3.55	4G	100 Mbps	Postpaid	1 Month	✗	✓	✓	✓
	Mobil 24 GB	24	499	53.27	2.22	4G	100 Mbps	Postpaid	1 Month	✗	✓	✓	✓
	Mobil 50 GB	50	599	63.94	1.28	4G	100 Mbps	Postpaid	1 Month	✗	✓	✓	✓
	3Total 3G	2	199	21.24	10.62	3G		Postpaid	1 Month	✗	✗	✗	✗
	3Total 2	2	349	37.25	18.63	4G		Postpaid	1 Month	✗	✗	✗	✗
	3Total 6	6	449	47.93	7.99	4G		Postpaid	1 Month	✗	✗	✗	✗
	3Total 20	20	549	58.60	2.93	4G		Postpaid	1 Month	✗	✗	✗	✗
	3Total 50	50	649	69.28	1.39	4G		Postpaid	1 Month	✗	✗	✗	✗





DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	2GB Mobile Data 12 Months	2.00	10.00	13.65	6.83	4G		Postpaid	1 Month	✗	✓	✗	✗
	5GB Mobile Data 1 Month	5.00	15.00	20.48	4.10	4G		Postpaid	1 Month	✗	✓	✗	✗
	15GB Mobile Data 1 Month	15.00	20.00	27.30	1.82	4G		Postpaid	1 Month	✗	✓	✗	✗
	20GB Mobile Data 1 Month	20.00	23.00	31.40	1.57	4G		Postpaid	1 Month	✗	✓	✗	✗
	Broadband - Pay As You Go + 1	1.00	10.49	14.32	14.32	4G		Prepaid	1 Month	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	1.00	10.00	13.65	13.65	4G	60 Mbps	Postpaid	1 Month	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	3.00	15.00	20.48	6.83	4G		Postpaid	1 Month	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	15.00	20.00	27.30	1.82	4G		Postpaid	1 Month	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	25.00	30.00	40.95	1.64	4G		Postpaid	1 Month	✗	✓	✗	✗
	Pay Monthly 2GB	2.00	11.00	13.82	6.91	4G		Postpaid	1 Month	✗	✗	✗	✓
	Pay Monthly 6GB	6.00	16.00	20.10	3.35	4G		Postpaid	1 Month	✗	✗	✗	✓
	Pay Monthly 10GB	10.00	22.00	27.64	2.76	4G		Postpaid	1 Month	✗	✗	✗	✓
	30 days one off top-up 1GB	1.00	10.00	13.65	13.65	4G		Prepaid	1 Month	✗	✗	✗	✓
	30 days one off top-up 2GB	2.00	15.00	20.48	10.24	4G		Prepaid	1 Month	✗	✗	✗	✓
	30 days one off top-up 4GB	4.00	21.00	28.67	7.17	4G		Prepaid	1 Month	✗	✗	✗	✓
	30 days one off top-up 8GB	8.00	26.00	35.49	4.44	4G		Prepaid	1 Month	✗	✗	✗	✓
	Sim Only Data Bundle	1.00	10.00	13.65	13.65	4G		Postpaid	1 Month	✗	✗	✗	✓
	Sim Only Data Bundle	3.00	15.00	20.48	6.83	4G		Postpaid	1 Month	✗	✗	✗	✓
	Sim Only Data Bundle	10.00	20.00	27.30	2.73	4G		Postpaid	1 Month	✗	✗	✗	✓
	iPad SIM 1GB	1.00	10.00	12.56	12.56	4G		Prepaid	1 Month	✗	✗	✗	✓
	iPad SIM 2GB	2.00	15.00	18.85	9.42	4G		Prepaid	1 Month	✗	✗	✗	✓
	iPad SIM 3GB	3.00	20.00	25.13	8.38	4G		Prepaid	1 Month	✗	✗	✗	✓
	iPad SIM 6GB	6.00	25.00	31.41	5.24	4G		Prepaid	1 Month	✗	✗	✗	✓

Sample: EE, O2, Vodafone, 3UK



Note: Tariffs updated to end of October 2015

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	All-you-can-eat minutes 4GB	4.00	21.00	28.67	7.17	4G	50 Mbps	Postpaid	12 Months	✗	✓	✗	✗
	All-you-can-eat minutes 8GB	8.00	24.00	32.76	4.10	4G	50 Mbps	Postpaid	12 Months	✗	✓	✗	✗
	All-you-can-eat data & minutes	Unlimited	27.00	36.86	N/A	4G	50 Mbps	Postpaid	12 Months	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	4.00	20.99	28.65	7.16	4G		Postpaid	12 Months	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	6.00	23.99	32.75	5.46	4G		Postpaid	12 Months	✗	✓	✗	✗
	EE PAYM 4G Multi SIM	10.00	25.99	35.48	3.55	4G		Postpaid	12 Months	✗	✓	✗	✗
	Pay Monthly 1GB	1.00	13.60	18.56	18.56	4G		Postpaid	12 Months	✗	✗	✗	✓
	Pay Monthly 2GB	2.00	15.30	20.88	10.44	4G		Postpaid	12 Months	✗	✗	✗	✓
	Pay Monthly 4GB	4.00	19.54	26.67	6.67	4G		Postpaid	12 Months	✗	✗	✗	✓
	Pay Monthly 7GB	7.00	23.80	32.49	4.64	4G		Postpaid	12 Months	✗	✗	✗	✓
	Pay Monthly 10GB	10.00	27.20	37.13	3.71	4G		Postpaid	12 Months	✗	✗	✗	✓
	Pay Monthly 20GB	20.00	30.60	41.77	2.09	4G		Postpaid	12 Months	✗	✗	✗	✓
	Red 2GB	2.00	15.30	20.88	10.44	4G		Postpaid	12 Months	✗	✗	✗	✓
	Red Value 4GB	4.00	19.80	27.03	6.76	4G		Postpaid	12 Months	✓	✗	✗	✓
	Red Value 6GB	6.00	24.30	33.17	5.53	4G		Postpaid	12 Months	✓	✗	✗	✓
	Red Value 10GB	10.00	27.20	37.13	3.71	4G		Postpaid	12 Months	✓	✗	✗	✓
	Red Value 20GB	20.00	30.00	40.95	2.05	4G		Postpaid	12 Months	✓	✗	✗	✓
	Big Value Bundle	4.00	30.00	40.95	10.24	4G		Prepaid	Monthly	✓	✗	✗	✓
	Big Value Bundle	6.00	40.00	54.60	9.10	4G		Prepaid	Monthly	✓	✗	✗	✓



Sample: EE, O2, Vodafone, 3UK
 Note: Tariffs updated to end of October 2015

DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	DataConnect 3GB	3	30.00	26.87	8.96	4G	NA	Postpaid	1 Month	✗	✗	✗	✗
	Mobile Share Data 4GB	4	40.00	35.83	8.96	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 6GB	6	50.00	44.79	7.46	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 10GB	10	70.00	62.70	6.27	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 15GB	15	100.00	89.58	5.97	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 20GB	20	120.00	107.49	5.37	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 30GB	30	195.00	174.67	5.82	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 40GB	40	270.00	241.85	6.05	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Data 50GB	50	345.00	309.04	6.18	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	GoPhone Tablet 2GB	2	25.00	22.39	11.20	4G	NA	Prepaid	1 Month	✗	✗	✗	✗
	GoPhone Tablet 5GB	5	50.00	44.79	8.96	4G	NA	Prepaid	1 Month	✗	✗	✗	✗
	GoPhone Tablet 8GB	8	75.00	67.18	8.40	4G	NA	Prepaid	1 Month	✗	✗	✗	✗
	Simple Choice for Tablets and More 2GB	2	20.00	17.92	8.96	4G	20 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Simple Choice for Tablets and More 6GB	6	35.00	31.35	5.23	4G	20 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Simple Choice for Tablets and More 10GB	10	50.00	44.79	4.48	4G	20 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Simple Choice for Tablets and More 14GB	14	65.00	58.22	4.16	4G	20 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Simple Choice for Tablets and More 18GB	18	80.00	71.66	3.98	4G	20 Mbps	Postpaid	1 Month	✓	✓	✗	✓
	Month Pass 3GB	3	30.00	26.87	8.96	4G	20 Mbps	Prepaid	1 Month	✓	✓	✗	✗
	Always-connected monthly 22GB	22	95.00	85.10	3.87	4G	20 Mbps	Prepaid	1 Month	✓	✓	✗	✗



Sample: AT&T, Sprint, T-Mobile, Verizon
 Note: Tariffs updated to end of October 2015

DATA PLANS: Analyzed plan detail



Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Data Only Plan 2GB	2	30.00	26.87	13.44	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 4GB	4	40.00	35.83	8.96	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 6GB	6	50.00	44.79	7.46	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 8GB	8	60.00	53.75	6.72	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 10GB	10	70.00	62.70	6.27	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 12GB	12	80.00	71.66	5.97	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 14GB	14	90.00	80.62	5.76	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 16GB	16	100.00	89.58	5.60	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 18GB	18	110.00	98.53	5.47	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 20GB	20	120.00	107.49	5.37	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 30GB	30	195.00	174.67	5.82	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 40GB	40	270.00	241.85	6.05	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 50GB	50	345.00	309.04	6.18	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 60GB	60	420.00	367.26	6.12	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 80GB	80	570.00	510.58	6.38	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
	Data Only Plan 100GB	100	720.00	644.95	6.45	4G	50 Mbps	Postpaid	1 Month	✓	✗	✓	✓
Data Device Plan 1GB	1	20.00	26.87	13.44	4G	50 Mbps	Prepaid	1 Month	✓	✗	✓	✓	
	Data Plan 1GB	1	15.00	13.44	13.44	4G	10+ Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Data Plan 3GB	3	35.00	31.35	10.45	4G	10+ Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Data Plan 6GB	6	50.00	44.79	7.46	4G	10+ Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Data Plan 12GB	12	80.00	71.66	5.97	4G	10+ Mbps	Postpaid	1 Month	✓	✗	✓	✗
	Data Plan 30GB	30	110.00	98.53	3.28	4G	10+ Mbps	Postpaid	1 Month	✓	✗	✓	✗

Sample: AT&T, Sprint, T-Mobile, Verizon
 Note: Tariffs updated to end of October 2015


VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mobile Share Value 2GB	2	55.00	49.27	24.63	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 5GB	5	75.00	67.18	13.44	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 15GB	15	115.00	103.01	6.87	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 20GB	20	155.00	138.84	6.94	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 25GB	25	190.00	170.19	6.81	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 30GB	30	240.00	214.98	7.17	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 40GB	40	315.00	282.16	7.05	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	Mobile Share Value 50GB	50	390.00	349.35	6.99	4G	NA	Postpaid	1 Month	✗	✓	✓	✓
	GoPhone 1.5GB	1.5	45.00	40.31	26.87	4G	NA	Prepaid	1 Month	✗	✓	✗	✗
	GoPhone 4GB	4	60.00	53.75	13.44	4G	NA	Prepaid	1 Month	✗	✓	✗	✗
	Simple Choice for Phones 2GB	2	50.00	44.79	22.39	4G	20 Mbps	Postpaid /Prepaid	1 Month	✓	✓	✗	✓
	Simple Choice for Phones 6GB	6	65.00	58.22	9.70	4G	20 Mbps	Postpaid /Prepaid	1 Month	✓	✓	✗	✓
	Simple Choice for Phones 10GB	10	80.00	71.66	7.17	4G	20 Mbps	Postpaid /Prepaid	1 Month	✓	✓	✗	✓
	Simple Choice for Phones Unlimited	Unlimited	95.00	85.10	#VALUE!	4G	20 Mbps	Postpaid /Prepaid	1 Month	✓	✓	✗	✓


VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	The Verizon Plan (S) 1GB	1	50.00	44.79	44.79	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan (M) 3GB	3	65.00	58.22	19.41	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan (L) 6GB	6	80.00	71.66	11.94	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan (XL) 12GB	12	100.00	89.58	7.46	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan (XXL) 18GB	18	120.00	107.49	5.97	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 20GB	20	140.00	125.41	6.27	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 25GB	25	195.00	174.67	6.99	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 30GB	30	245.00	219.46	7.32	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 40GB	40	320.00	286.64	7.17	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 50GB	50	395.00	353.82	7.08	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 60GB	60	470.00	421.01	7.02	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 80GB	80	620.00	555.37	6.94	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	The Verizon Plan 100GB	100	770.00	689.73	6.90	4G	50 Mbps	Postpaid	1 Month	✓	✓	✓	✓
	Prepaid Smartphone Plan 1GB	1	45.00	40.31	40.31	4G	50 Mbps	Prepaid	1 Month	✗	✓	✓	✗
Prepaid Smartphone Plan 3GB	3	60.00	53.75	17.92	4G	50 Mbps	Prepaid	1 Month	✗	✓	✓	✗	
	Unlimited Hi-Speed Data Plan	Unlimited	70.00	62.70	#VALUE!	4G	10+ Mbps	Postpaid	1 Month	✓	✓	✓	✗
	Prepaid Unlimited Talk & Text 1GB	1	35.00	31.35	31.35	4G	10+ Mbps	Prepaid	1 Month	✓	✓	✓	✗
	Prepaid Unlimited Talk & Text 3GB	3	45.00	40.31	13.44	4G	10+ Mbps	Prepaid	1 Month	✓	✓	✓	✗
	Prepaid Unlimited Talk & Text 6GB	6	55.00	49.27	8.21	4G	10+ Mbps	Prepaid	1 Month	✓	✓	✓	✗




DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Unlimited Data Only 5GB	5	6.00	14.25	2.85	3G		Postpaid	1 Month	✗	✗	✗	✗
	Unlimited Data Only 15GB	15	10.00	23.74	1.58	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Unlimited Data Only 30GB	30	15.00	35.62	1.19	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Unlimited Data Only 40GB	40	20.00	47.49	1.19	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Unlimited Data Only 80GB	80	30.00	71.23	0.89	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Unlimited Data Only 300GB	300	45.00	106.85	0.36	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Unlimited Data Only 500GB	500	60.00	142.46	0.28	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Starter Package + 2GB add-on (3G)	2	6.00	14.25	7.12	3G		Prepaid	1 Month	✗	✗	✗	✗
	Starter Package + 3GB add-on (3G)	3	7.00	16.62	5.54	3G		Prepaid	1 Month	✗	✗	✗	✗
	Starter Package + 4GB add-on (4G)	4	8.00	19.00	4.75	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Starter Package + 7GB add-on (4G)	7	13.00	30.87	4.41	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Starter Package + 20GB add-on (4G)	20	23.00	54.61	2.73	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Starter Package + 30GB add-on (4G)	30	33.00	78.36	2.61	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗




DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Vanilla	15	6.00	14.25	0.95	4G	15 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Browser	40	10.00	23.74	0.59	4G	25 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Gamer	30	12.50	29.68	0.99	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Downloader	120	12.50	29.68	0.25	4G	15 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Hero	100	15.00	35.62	0.36	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Raider	250	25.00	59.36	0.24	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	Raider Plus	1000	45.00	106.85	0.11	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✓
	e-GO Data SIM + 3GB add-on	3	6.00	14.25	4.75	4G		Prepaid	1 Month	✗	✗	✗	✗
	e-GO Data SIM + 8GB add-on	8	12.00	28.49	3.56	4G		Prepaid	1 Month	✗	✗	✗	✗
	Broadband 7	5	7.00	16.62	3.32	4G		Postpaid	1 Month	✗	✗	✓	✗
	Broadband 10	10	10.00	23.74	2.37	4G		Postpaid	1 Month	✗	✗	✓	✓
	Broadband 15	15	15.00	35.62	2.37	4G		Postpaid	1 Month	✗	✗	✓	✓
	Broadband 25	30	25.00	59.36	1.98	4G		Postpaid	1 Month	✗	✗	✓	✓
	Broadband 35	60	35.00	83.10	1.39	4G		Postpaid	1 Month	✗	✗	✓	✓
	4G Prepaid Broadband Starter Pack + 4GB add-on (promotion)	4	5.00	11.87	2.97	4G		Prepaid	1 Month	✗	✗	✓	✗
	4G Prepaid Broadband Starter Pack + 8GB add-on (promotion)	8	7.00	16.62	2.08	4G		Prepaid	1 Month	✗	✗	✓	✗
	4G Prepaid Broadband Starter Pack + 16GB add-on (promotion)	16	12.00	28.49	1.78	4G		Prepaid	1 Month	✗	✗	✓	✗



DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Connect 4G 2 GB	2	55.00	13.14	6.57	4G		Postpaid/ Prepaid	1 Month	✗	✗	✓	✗
	Connect 4G 5 GB	5	90.00	21.50	4.30	4G		Postpaid/ Prepaid	1 Month	✗	✗	✓	✗
	4G Data SIM Postpaid 1GB	1	44.00	10.51	10.51	4G		Postpaid	1 Month	✗	✗	✗	✗
	4G Data SIM Postpaid 3GB*	3	84.00	20.06	6.69	4G		Postpaid	1 Month	✗	✗	✗	✗
	4G Data SIM Postpaid 6GB*	6	110.00	26.27	4.38	4G		Postpaid	1 Month	✗	✗	✗	✗
	4G Data SIM Postpaid Unlimited	Unlimited	199.00	47.53	N/A	4G		Postpaid	1 Month	✗	✗	✗	✗
	4G Data SIM Prepaid 3GB	3	70.00	16.72	5.57	4G		Prepaid	1 Month	✗	✗	✗	✗
	SPEED 4G Internet Plan 2GB	2	40.00	9.55	4.78	4G		Postpaid/ Prepaid	1 Month	✗	✗	✗	✗
	SPEED 4G Internet Plan 5GB	5	70.00	16.72	3.34	4G	250 Mbps	Postpaid/ Prepaid	1 Month	✗	✗	✗	✗

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Postpaid 1000	Unlimited	1,000.00	238.83	N/A	4G	250 Mbps	Postpaid	12 Months	✗	✓	✗	✓
	Wajid Extra	10	399.00	95.29	9.53	4G	250 Mbps	Postpaid	3 Months	✗	✓	✗	✓
	Mazaya Elite	5	450.00	107.48	21.50	4G	250 Mbps	Postpaid	1 Month	✗	✓	✗	✗
	Shebab Nitro Package	10	249.00	59.47	5.95	4G	250 Mbps	Postpaid & Prepaid	1 Month	✗	✓	✗	✗
	X-LARGE Package	10	400.00	95.53	9.55	4G	250 Mbps	Postpaid	1 Month	✗	✓	✗	✓
	XTRA Package	1000	1,000.00	238.83	0.24	4G		Postpaid	1 Month	✗	✓	✗	✓


DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Postpaid Internet 11	100	11.00	32.57	0.33	4G		Postpaid	1 month	✗	✗	✓	✗
	Postpaid Internet 16	500	16.00	47.37	0.09	4G		Postpaid	1 month	✗	✗	✓	✗
	Postpaid Internet 20	1000	20.00	59.21	0.06	4G		Postpaid	1 month	✓	✗	✓	✗
	Eezee Internet 5	3	5.00	14.80	4.93	4G		Prepaid	1 month	✗	✗	✓	✗
	Eezee Internet 8	15	8.00	23.69	1.58	4G		Prepaid	1 month	✗	✗	✓	✗
	Eezee Internet 11	100	11.00	32.57	0.33	4G		Prepaid	1 month	✗	✗	✓	✗
	Eezee Internet 16	500	16.00	47.37	0.09	4G		Prepaid	1 month	✗	✗	✓	✗
	Eezee Internet 20	1000	20.00	59.21	0.06	4G		Prepaid	1 month	✗	✗	✓	✗
	4G + plans without commitment 30GB	30	7.00	20.72	0.69	4G	225 Mbps	Postpaid	1 month	✗	✗	✗	✗
	4G + plans without commitment 150GB	150	9.00	26.65	0.18	4G	225 Mbps	Postpaid	1 month	✗	✗	✗	✗
	4G + plans without commitment 300GB	300	11.00	32.57	0.11	4G	225 Mbps	Postpaid	1 month	✗	✗	✗	✗
	4G + plans without commitment 500GB	500	14.00	41.45	0.08	4G	225 Mbps	Postpaid	1 month	✗	✗	✗	✗
	4G + plans without commitment 1000GB	1000	17.00	50.33	0.05	4G	225 Mbps	Postpaid	1 month	✗	✗	✗	✗
	My Net 4.5 GB	3	5.00	14.80	4.93	3G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗
	My Net 8 GB	4	7.00	20.72	5.18	4G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗
	My Net 20 GB	10	10.00	29.61	2.96	4G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗
	My Net 60 GB	30	15.00	44.41	1.48	4G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗
	My Net 100 GB	100	20.00	59.21	0.59	4G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗
My Net 300 GB	300	22.00	65.14	0.22	4G	150 Mbps	Postpaid / Prepaid	1 month	✓	✗	✓	✗	




Sample: Ooredoo, Viva, Zain

Note: Tariffs updated to end of October 2015



DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Postpaid KD 9	105	9.00	26.65	0.25	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✗
	Postpaid KD 13	500	13.00	38.49	0.08	4G	150 Mbps	Postpaid	1 Month	✗	✗	✓	✗
	Postpaid KD 18	Unlimited	18.00	53.29	N/A	4G	150 Mbps	Postpaid	12 months	✗	✗	✓	✗
	Prepaid Internet KD 4	4	4.00	11.84	2.96	4G	150 Mbps	Prepaid	1 month	✓	✗	✓	✗
	Prepaid Internet KD 7	15	7.00	20.72	1.38	4G	150 Mbps	Prepaid	1 month	✓	✗	✓	✗
	Prepaid Internet KD 18	Unlimited	18.00	53.29	N/A	4G	150 Mbps	Prepaid	1 month	✓	✗	✓	✗



VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Postpaid 57 - No commitment	30	57.00	168.76	5.63	4G		Postpaid	1 month	✗	✗	✓	✗
	Postpaid 60 - No commitment	300	60.00	177.64	0.59	4G		Postpaid	1 month	✗	✗	✓	✗
	Postpaid 65 - No commitment	500	65.00	192.45	0.38	4G		Postpaid	1 month	✗	✗	✓	✗
	Prepaid Internet Bundle 51	8	51.00	151.00	18.87	4G		Prepaid	1 month	✗	✗	✓	✗
	Shamel 58	300	58.00	171.72	0.57	4G		Postpaid	NA	✓	✓	✓	✓
	Postpaid KD 55	Unlimited	55.00	162.84	NA	4G		Postpaid	12/18/24 Months	✗	✗	✓	✓



DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mada 1GB monthly plan	1	5.00	11.63	11.63	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Mada 3GB monthly plan	3	10.00	23.25	7.75	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Mada 5GB monthly plan	5	15.00	34.88	6.98	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Mada 10GB monthly plan	10	25.00	58.14	5.81	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Mada 15GB monthly plan	15	34.00	79.06	5.27	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Mada 30GB monthly plan	30	59.00	137.20	4.57	4G	100 Mbps	Postpaid	1 Month	✓	✗	✗	✗
	Hayyak Monthly 1GB	1	5.00	11.63	11.63	4G	100 Mbps	Prepaid	1 Month	✓	✗	✗	✗
	Hayyak Monthly 3GB	3	10.00	23.25	7.75	4G	100 Mbps	Prepaid	1 Month	✓	✗	✗	✗
	Hayyak Monthly 5GB	5	15.00	34.88	6.98	4G	100 Mbps	Prepaid	1 Month	✓	✗	✗	✗
	Hayyak Monthly 10GB	10	25.00	58.14	5.81	4G	100 Mbps	Prepaid	1 Month	✓	✗	✗	✗
	Shahry 1GB internet plan	1	5.00	11.63	11.63	4G		Postpaid	1 Month	✓	✗	✗	✗
	Shahry 3GB internet plan	3	10.00	23.25	7.75	4G		Postpaid	1 Month	✓	✗	✗	✗
	Shahry 6GB internet plan	6	17.00	39.53	6.59	4G		Postpaid	1 Month	✓	✗	✗	✗
	Shahry 10GB internet plan	10	24.00	55.81	5.58	4G		Postpaid	1 Month	✓	✗	✗	✗
	Shahry 30 GB internet plan	30	49.00	113.95	3.80	4G		Postpaid	1 Month	✓	✗	✗	✗
	Mousbak 1GB monthly plan	1	5.00	11.63	11.63	4G		Prepaid	1 Month	✓	✗	✗	✗
	Mousbak 3GB monthly plan	3	10.00	23.25	7.75	4G		Prepaid	1 Month	✓	✗	✗	✗
	Mousbak 6GB monthly plan new	6	17.00	39.53	6.59	4G		Prepaid	1 Month	✓	✗	✗	✗
	Mousbak 10GB monthly plan new	10	24.00	55.81	5.58	4G		Prepaid	1 Month	✓	✗	✗	✗
	Mousbak 30GB monthly plan new	30	49.00	113.95	3.80	4G		Prepaid	1 Month	✓	✗	✗	✗



VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Mada Infinity	5	39.00	90.69	18.14	4G	100 Mbps	Postpaid	NA	✓	✗	✓	✓
	Shahry Mazeed	3	34.00	79.06	26.35	4G		Postpaid	1 Month	✓	✗	✗	✗



DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Shahry Mobile Internet / Data Recharge - 1 GB	1	60.00	14.76	14.76	4G	225 Mbps	Postpaid / Prepaid	1 Month	✗	✗	✗	✗
	Shahry Mobile Internet / Data Recharge - 1 GB	3	80.00	19.68	6.56	4G	225 Mbps	Postpaid / Prepaid	1 Month	✗	✗	✗	✗
	Shahry Mobile Internet / Data Recharge - 1 GB	6	100.00	24.59	4.10	4G	225 Mbps	Postpaid / Prepaid	1 Month	✗	✗	✗	✗
	Shahry Mobile Internet / Data Recharge - 1 GB	15	200.00	49.19	3.28	4G	225 Mbps	Postpaid / Prepaid	1 Month	✗	✗	✗	✗
	Data Recharge Unlimited	unlimited	400.00	98.38	N/A	4G	225 Mbps	Postpaid / Prepaid	1 Month	✗	✗	✗	✗
	Red Internet Basic Pack	1	50.00	12.30	12.30	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Monthly Pack 50	1	50.00	12.30	12.30	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Monthly Pack 80	3	80.00	19.68	6.56	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Monthly Pack 100	6	100.00	24.59	4.10	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Red Internet Regular Pack	7	100.00	24.59	3.51	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Monthly Pack 200	12	200.00	49.19	4.10	4G	150 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Red Internet Super Pack	15	200.00	49.19	3.28	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Red Internet Ultimate Pack	25	300.00	73.78	2.95	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Data Plan 400 (unlimited - FUP)	60	400.00	98.38	1.64	4G	150 Mbps	Postpaid	1 Month	✗	✗	✗	✗

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Shahry SuperPack	1	150.00	36.89	36.89	4G	225 Mbps	Postpaid	3 Months	✗	✓	✗	✗
	Shahry - Smart 250	1	250.00	61.49	61.49	4G	225 Mbps	Postpaid	3 Months	✗	✗	✗	✗
	Shahry - Smart 450	6	450.00	110.68	18.45	4G	225 Mbps	Postpaid	3 Months	✗	✓	✗	✗
	Shahry - Smart 750	10	750.00	184.46	18.45	4G	225 Mbps	Postpaid	3 Months	✗	✓	✗	✗
	Red M	1	250.00	61.49	61.49	4G	150 Mbps	Postpaid	3 months	✗	✓	✗	✓
	Red L	6	350.00	86.08	14.35	4G	150 Mbps	Postpaid	3 months	✗	✓	✗	✓
	Red XL	10	750.00	184.46	18.45	4G	150 Mbps	Postpaid	3 months	✗	✓	✗	✓
	Red VIP	15	1,000.00	245.95	16.40	4G	150 Mbps	Postpaid	3 months	✗	✓	✓	✓



DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	1GB monthly plan	1	99.00	24.14	24.14	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	3GB monthly plan	3	149.00	36.34	12.11	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	7GB monthly plan	7	249.00	60.73	8.68	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	10GB monthly plan	10	299.00	72.92	7.29	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	20GB monthly plan	20	449.00	109.50	5.48	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Unlimited monthly plan	50	999.00	243.64	4.87	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Double data 50 AED (one-time)	0.6	50.00	12.19	20.32	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 100 AED (one-time)	2	100.00	24.39	12.19	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 150 AED (one-time)	6	150.00	36.58	6.10	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 200 AED (one-time)	10	200.00	48.78	4.88	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 250 AED (one-time)	14	250.00	60.97	4.36	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 300 AED (one-time)	20	300.00	73.16	3.66	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
	Double data 450 AED (one-time)	40	450.00	109.75	2.74	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗
Double data 500 AED (one-time)	50	500.00	121.94	2.44	4G	250 Mbps	Prepaid	1 Month	✗	✗	✗	✗	
	Monthly data pack 1GB	1	100.00	24.39	24.39	4G		Postpaid	1 Month	✗	✗	✓	✓
	Monthly data pack 5GB	5	200.00	48.78	9.76	4G		Postpaid	1 Month	✗	✗	✓	✓
	Monthly data pack 25GB	25	500.00	121.94	4.88	4G		Postpaid/ Prepaid	1 Month	✗	✗	✓	✓
	Data festival AED 50	0.6	50.00	12.19	20.32	4G		Prepaid	1 Month	✗	✗	✓	✓
	Data festival AED 100	2	100.00	24.39	12.19	4G		Prepaid	1 Month	✗	✗	✓	✓
	Data festival AED 150	6	150.00	36.58	6.10	4G		Prepaid	1 Month	✗	✗	✓	✓
	Data festival AED 200	10	200.00	48.78	4.88	4G		Prepaid	1 Month	✗	✗	✓	✓
	Data festival AED 300	20	300.00	73.16	3.66	4G		Prepaid	1 Month	✗	✗	✓	✓

Sample: Du, Etisalat

Note: Tariffs updated to end of October 2015

VOICE + DATA PLANS: Analyzed plan detail

Company	Offer Name	GB included	Price per month	Price per month (EUR)	Price per GB in (EUR)	Network (3G/4G)	Network Speed (Mbps)	Prepaid/ Postpaid	Contract Minimum Length	VAS Media, Entert.	VAS Accessibility	VAS Productivity	VAS Sharability
	Emirati 300	2	300.00	73.16	36.58	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Emirati 600	4	600.00	146.33	36.58	4G	250 Mbps	Postpaid	1 Month	✗	✓	✗	✗
	Smart 600	4	600.00	146.33	36.58	4G	250 Mbps	Postpaid	1 Month	✗	✗	✗	✗
	Emirati 1000	10	1,000.00	243.88	24.39	4G	250 Mbps	Postpaid	1 Month	✗	✓	✗	✗
	Smart 1000	10	1,000.00	243.88	24.39	4G	250 Mbps	Postpaid	1 Month	✗	✗	✓	✓
	Emirati Plan 300	2	300.00	73.16	36.58	4G		Postpaid	1 Month	✗	✗	✓	✓
	Emirati Plan 600	4	600.00	146.33	36.58	4G		Postpaid	1 Month	✗	✓	✓	✓
	Smart 600	4	600.00	146.33	36.58	4G		Postpaid	1 Month	✗	✗	✓	✓
	Emirati Plan 1000	10	1,000.00	243.88	24.39	4G		Postpaid	1 Month	✗	✓	✓	✓
	Smart 1000	10	1,000.00	243.88	24.39	4G		Postpaid	1 Month	✗	✗	✗	✗

Exchange rates vs Euro

Market	Currency	Exchange Rate H1 2015 (@ 30/09/2015)
Bahrain	BHD	2.3744
Denmark	DKK	0.1340
KSA	SAR	0.2388
Kuwait	KWD	2.9607
Oman	OMR	2.3254
Qatar	QAR	0.2459
Sweden	SEK	0.1067
UAE	AED	0,2186
UK	GBP	1.3538
USA	USD	0.8957

* Source: x-rates.com, 30 September 2015

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