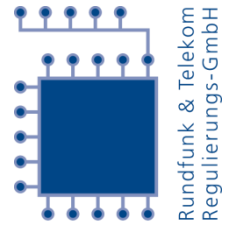


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BoR (15) 43

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RTR

# The Austrian mobile market post 4to3 merger

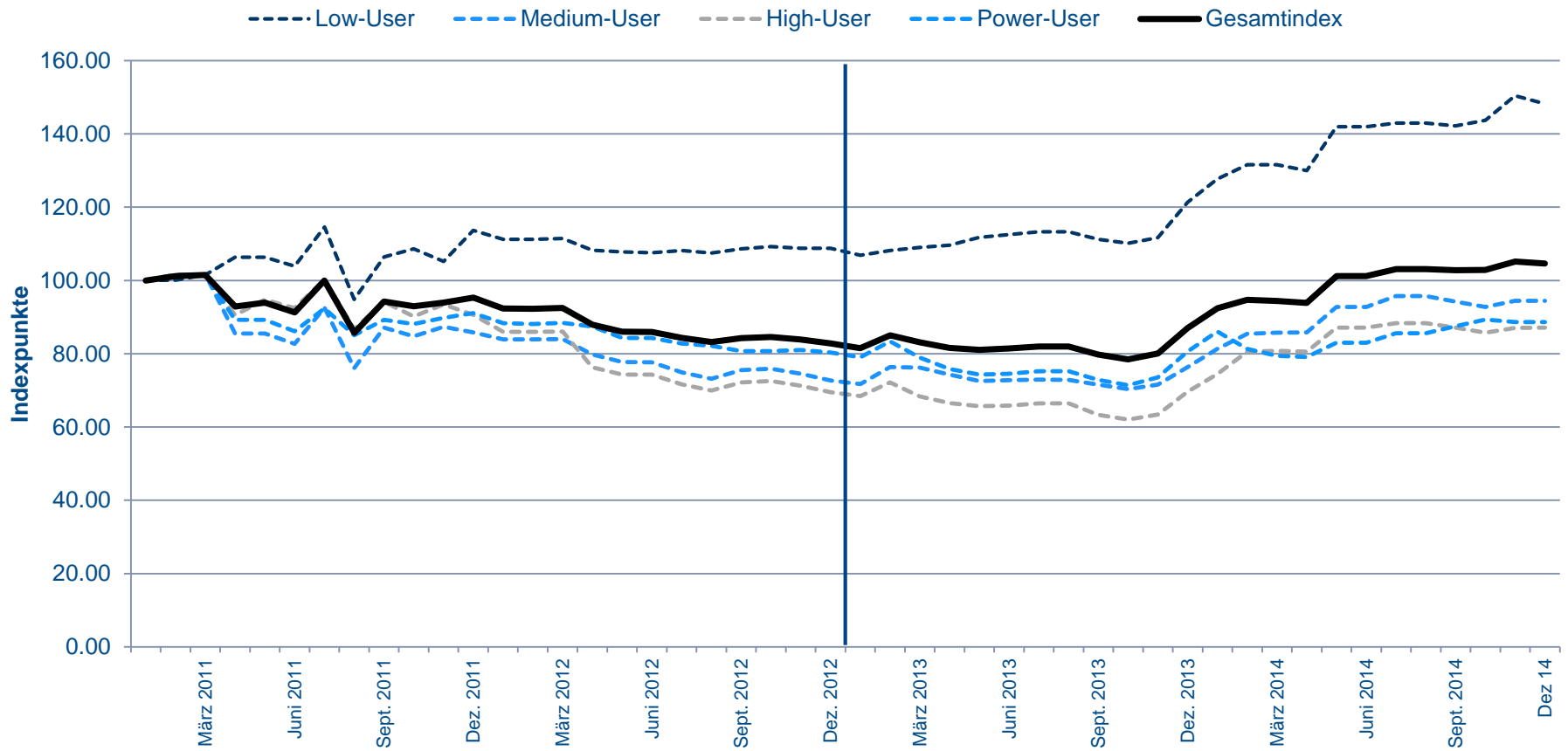
Johannes Gungl

25.02.2015



# Development of mobile prices since January 2011

Significant rise of prices since the merger for new customers





# Index figures January 2011 – December 2014

## Overview

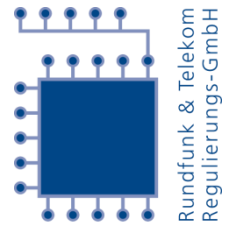
Month	Low-User	Medium-User	High-User	Power-User	Total Index
Jan 11	100.00	100.00	100.00	100.00	100.00
Jan 12	111.21	83.90	85.98	88.38	92.37
Jan 13	106.87	71.74	68.43	79.01	81.51
Apr 13	109.61	74.32	66.57	75.82	81.58
Jul 13	113.31	72.92	66.46	75.22	81.98
Okt 13	110.13	70.37	62.06	71.38	78.49
Jan 14	127.72	81.33	74.47	86.07	92.40
Apr 14	129.98	85.84	80.59	79.08	93.87
Jul 14	142.91	95.71	88.31	85.61	103.14
Okt 14	143.75	92.76	85.75	89.31	102.89
Nov 14	150.42	94.41	87.08	88.64	105.14
Dez 14	148.23	94.42	87.09	88.65	104.60



## Observations post 4to3 merger – summary

### Significant price increases for new as well as existing customers

- Price rises seen across all user groups for new customers
- Higher monthly fees included more minutes, SMS and data volumes
- New: Tariffs with unlimited minutes and SMS
- One-time activation fee increased by approx. 40%
- Out-of bundle cost and yearly service charge unchanged
- Price increases also for existing customers
- Market entry of MVNOs in 2015 based upon the merger remedies have stopped price increases (for the time being?) and caused one competitor to react
- 2 MVNOs have launched service and two others are expected
- Competition for MVNOs on wholesale level



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