BoR (22) 130

Intra-EU communications BEREC Benchmark Report April 2021 – March 2022

6 October 2022

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1. Structure of the Report

The Intra-EU communications BEREC Benchmark Report (the "Report") on Intra-EU communications contains five parts. Chapter two is an **Introduction** to the Body of European Regulators for Electronic Communications (BEREC) Report and describes BEREC's work on intra-EU communications carried out under Regulation (EU) 2015/2120, of the European Parliament and of the Council, of 25 November 2015, as amended by Regulation 2018/1971, of the European Parliament and of the Council, of 11 December 2018. The third Chapter "**Regulatory evolution**" outlines the background information behind the Intra-EU regulation. The key findings of this Report are included in the fourth Chapter, "**Main findings**". The fifth Chapter "**Charts"** presents the latest available data on Intra-EU mobile and fixed markets. "**Annex I: Methodology for the data collection**" provides a detailed description of the methodology for the current data collection. "**Annex II: List of respondents**" includes the list of operators that provided data for this Report. The Report is accompanied by a spreadsheet file enabling an easy and open access to the data included in the Report (published together with the Report) for the user.

2. Introduction

The Report presents the results of the 3rd data collection on Intra-EU communications by BEREC that took place after the implementation of the Regulation. BEREC has also collected data for a six-month period (1 October 2018 – 31 March 2019) before the implementation of the Regulation. For comparability reasons, some figures in this Report include also data from operators during period 1 October 2018 – 31 March 2019.
The Report covers the period 1 April 2021 – 31 March 2022, split by two periods: 1 April 2021 to 30 September 2021 and 1 October 2021 to 31 March 2022 (corresponding to the 2nd, 3rd and 4th quarters of 2021 and the 1st quarter of 2022. The figures presented in this report are based on data collected from national regulatory authorities (NRAs) on Intra-EU communications. The figures contained in this Report present information on traffic, revenues, consumption, etc. in regards to Intra-EU services. Similarly to the periodic International Roaming Benchmark Report, all of the data collected during data collection round is included in the accompanying .xls file and published on the BEREC website.

The applicable regulatory framework for this data collection is on intra-EU communications carried out under Regulation (EU) of the European Parliament and of the Council, of 25 November 2015, as amended by Regulation 2018/1971,[1] of the European Parliament and of the Council, of 11 December 2018, which includes new requirements for monitoring the price developments of regulated intra-EU communication services.

In order to assess the competitive developments in the Union-wide Intra-EU communications markets, BEREC has been tasked with regularly collecting data from national regulatory authorities on the development of retail charges for regulated Intra-EU communication services.

BEREC coordinates this process of data collection by pursuing the following objectives:

[1] Regulation (EU) 2018/1971 of the European Parliament and of the Council of 11 December 2018 https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1971&from=EN.

- simplifying the process not only for NRAs, as BEREC acts as a central point for the data collection, but also for the European Commission (EC), as the data is received from a single source and follows a uniform data processing;
- coordinating the procedures of individual NRAs, as a single and commonly agreed upon, data collection model is used for the process, and it is synchronised and based on the same collection periods. BEREC consults the market players and the European Commission before finalising the data collection templates;
- providing, as far as possible, a common response to the different questions posed during the collection process by operators and NRAs, as BEREC serves as the forum where these questions are commonly debated and addressed.

The questionnaire on Intra-EU communications was sent to the NRAs on 23 March 2022. It included separate sheets for mobile and fixed networks and had to be completed by both mobile and fixed operators. For the purpose of the data collection, only mobile and fixed operators meeting the reporting threshold of at least 0.5% market share were invited to provide their data.

3. Regulatory evolution

Intra-EU communication caps apply from 15 May 2019. This means any retail price charged to consumers for regulated intra-EU communications[2] shall not exceed €0,19 (+ VAT) per minute for calls and €0,06 (+ VAT) per SMS message.

The EU has made efforts to reduce the prices of electronic communications between EU countries. One of the main achievements for the Digital Single Market was the end of roaming charges in 2017 and subsequently in 2019 the imposition of price caps on intra-EU communications services.

The regulation introducing intra-EU caps aims to ensure that these rules will not distort competition, innovation and investment. This means that NRAs may, in exceptional circumstances, grant a derogation from the price regulation of intra-EU communications. The derogation is intended for exceptional circumstances, where the application of the price-caps would significantly impact a provider's capacity to sustain its existing prices for domestic communications.
The price caps apply to mobile and fixed calls and SMS originated in the domestic country to another EU Member States plus Iceland, Liechtenstein and Norway. For calls and SMS originating in Norway, Iceland and Liechtenstein the rules are applicable from the date they are incorporated in the EEA agreement.

[2] Regulated Intra-EU communications means any number-based interpersonal communications service originating in the Member State of the consumer's domestic provider and terminating at any fixed or mobile number of the national numbering plan of another Member State, and which is charged wholly or partly based on actual consumption.

4. Main findings

Over 190 providers of international communications provided information for this Report. This number includes virtually[3] all of the mobile and fixed network operators in the EEA countries, as well as a significant number of mobile virtual network operators (MVNOs) that provide EEA international communications services.

Consumption patterns of Intra-EU communication services

According to the data collected, the introduction of Intra EU communications regulation has not changed the international communication market substantially. The average international communication subscriber spent 31.21 minutes per month from fixed phone in Q2 and Q3 2021, while 31.75 minutes per month were spent in Q4 2021 and Q1 2022 (Figure 31). The average number of mobile calls originated in Q2 and Q3 2021 amounted to 10.10 minutes per month, while in Q4 2021 and Q1 2022 reached 9.59 minutes per month (Figure 33). On average 0.67 SMS were sent per month per Intra-EU subscriber in Q2 and Q3 2021, while 0.61 SMS per month were sent in Q4 2021 and Q1 2022 (Figure 35).

Intra-EU communication services: regulated and alternative tariffs

BEREC examined the percentage of subscribers using Intra-EU communication services with regulated prices (price caps) and alternative tariffs. The results show that around 6.60 % of fixed networks subscribers in Q2 and Q3 2021 used international communication services with regulated price and 6.18 % in Q4 2021 and Q1 2022 (Figure 1). Fixed alternative tariff plans including regulated international communication were not so popular – only 0.37 % of total fixed subscribers used alternative tariffs in Q2 and Q3 2021 and 0.36 % in Q4 2021 and Q1 2022 (Figure 5)

In the case of mobile networks, subscribers were more active using regulated tariffs. In Q2 and Q3 2021 15.00 % and in Q4 2021 and Q1 2022 14.56 % of total mobile subscribers benefited from the conditions of regulated international communications tariffs (Figure 3), while only 0.42 % of total mobile subscribers used alternative pricing provided by mobile network operators in Q2 and Q3 2021 and 0.38 % in Q4 2021 and Q1 2022, which is covered in this Report (Figure 7).

Intra-EU communication revenues per unit

With regard to revenues from international communications services with regulated price (Figure 21), the average revenues from fixed networks were approximately 0.03 EUR/min (excluding VAT) for the whole period under analysis. In addition, average revenues from fixed international communications services with alternative tariffs were 0.06 EUR/min in Q2 and Q3 2021 and 0.08 EUR/min in Q4 2021 and Q1 2022 (Figure 25), however it is needed to be noted that only few of the EU operators are offering such alternative plans for fixed network regulated international communications.

Regarding revenues per minute from mobile Intra-EU communication services, revenues from regulated tariffs amounted to 0.06 EUR/min for the whole period, which is covered in this

[3] This number includes all mobile and fixed operators in the EEA countries (including MVNOs) that provide EEA international communications services and had at least 0.5% market share.

Report (Figure 23). Revenues from alternative tariffs averaged similarly at 0.06 EUR/min for the whole period (Figure 27).

Finally, average revenues for SMS reached (Figure 29) 0.05 EUR/SMS in Q2 and Q3 2021 and 0.04 EUR/min in Q4 2021 and Q1 2022, while using regulated pricing policy, whereas alternative tariffs in Q2 and Q3 2021 generated 0.31 EUR/SMS and 0.33 EUR/SMS in Q4 2021 and Q1 2022 (Figure 30).

5. Charts

5.1. Analysis of fixed and mobile subscribers

Figure 1: Percentage of fixed subscribers that used intra-EU communications with regulated price from total number of active subscribers, as of 30 September 2021 - as of 31 March 2022.

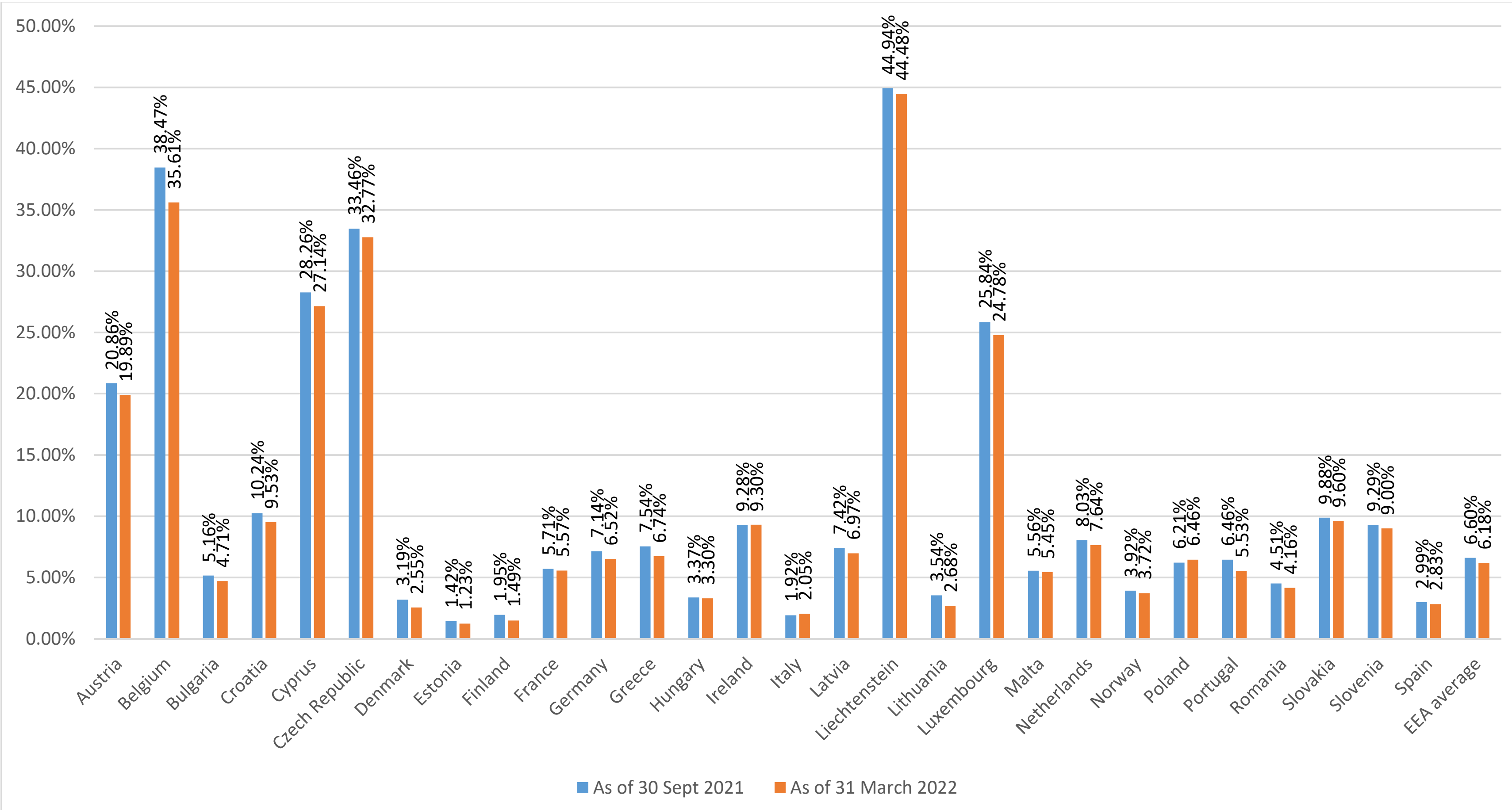
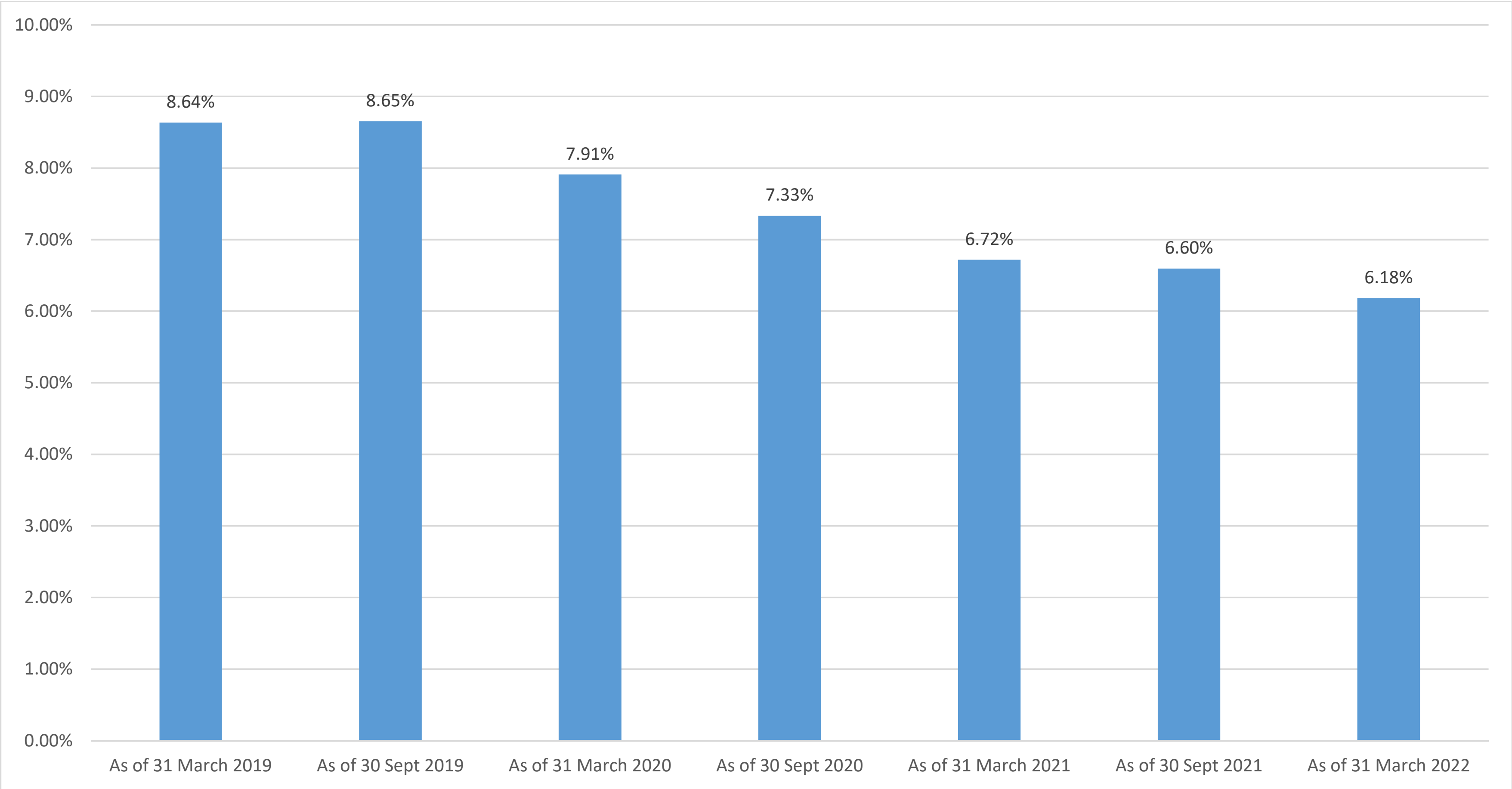


Figure 2: EEA average: percentage of fixed subscribers that used intra-EU communications with regulated price from total number of active subscribers, as of 31 March 2019 - as of 31 March 2022.



During data collection period October 2018 – March 2019, operators were asked to include metered (per unit) tariffs for consumers in the "Regulated tariffs" indicator section in order to have comparable data.

Figure 3: Percentage of mobile subscribers that used intra-EU communications with regulated price from (vs) total number of active subscribers, 30 September 2021 - as of 31 March 2022.

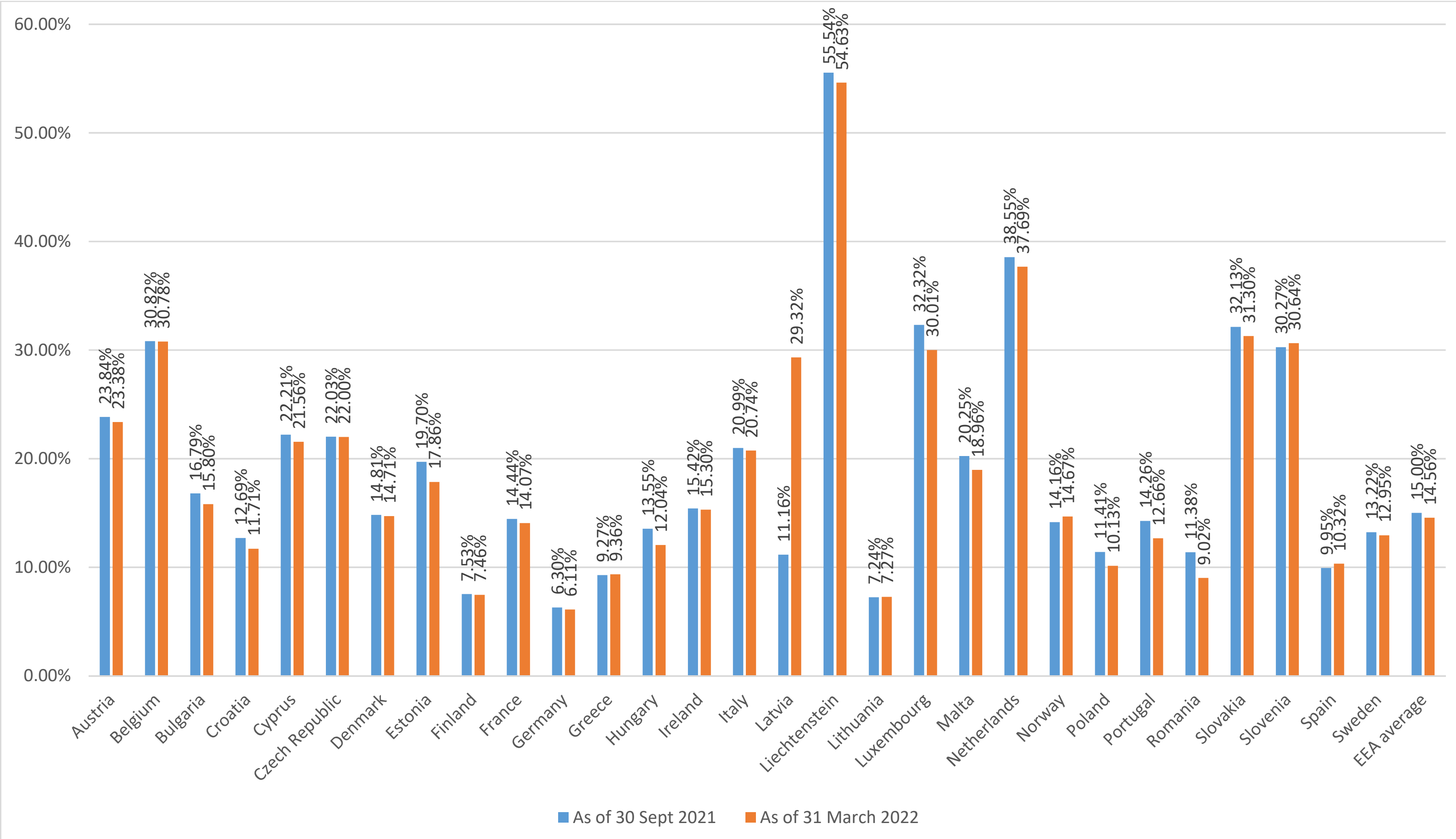
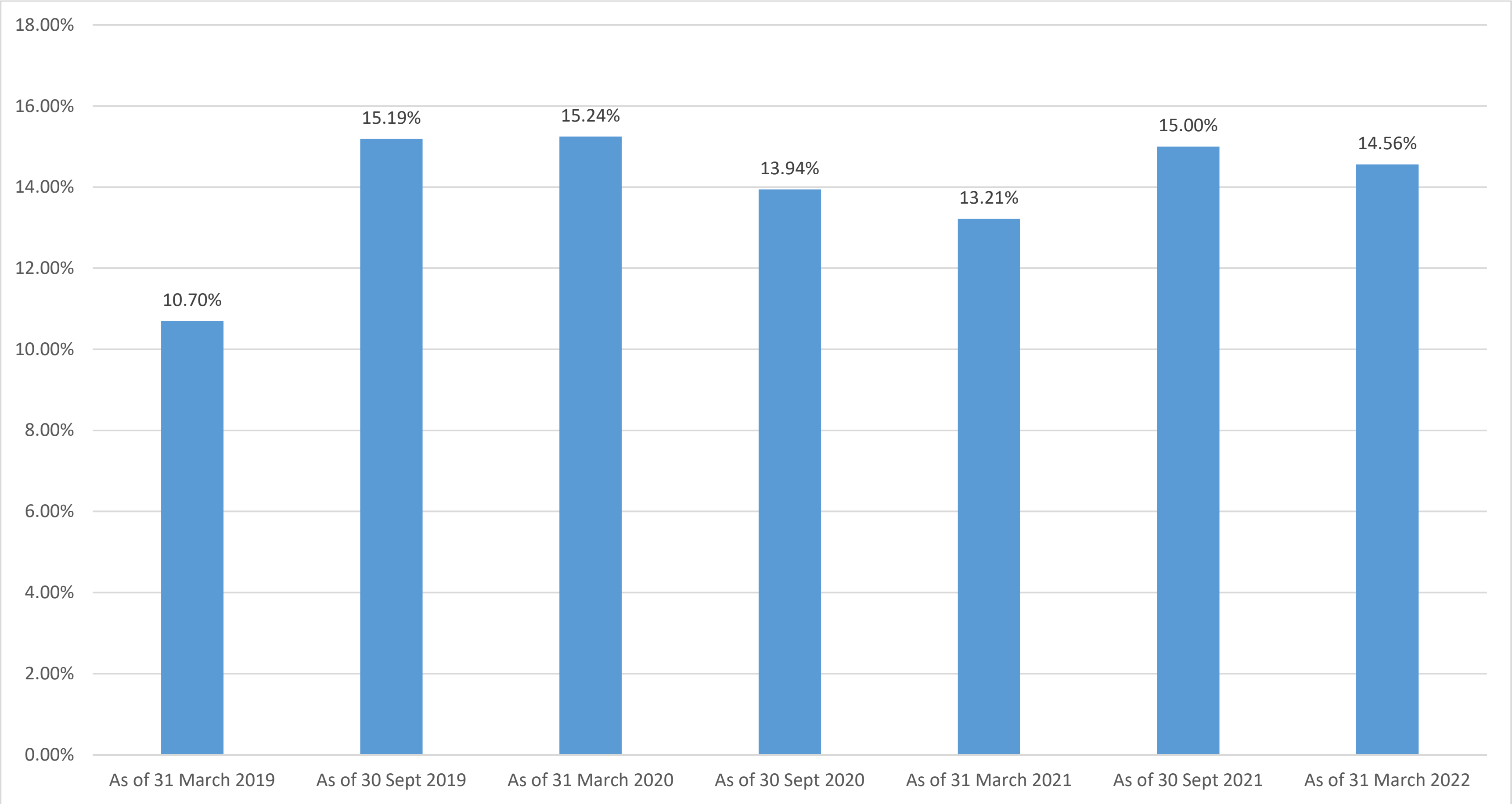


Figure 4: EEA average: percentage of mobile subscribers that used intra-EU communications with regulated price from (vs) total number of active subscribers, as of 31 March 2019 - as of 31 March 2022.



During data collection period October 2018 – March 2019, operators were asked to include metered (per unit) tariffs for consumers in the “Regulated tariffs” indicator section in order to have comparable data.

Figure 5: Percentage of fixed subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of September 2021 and as of March 2022.

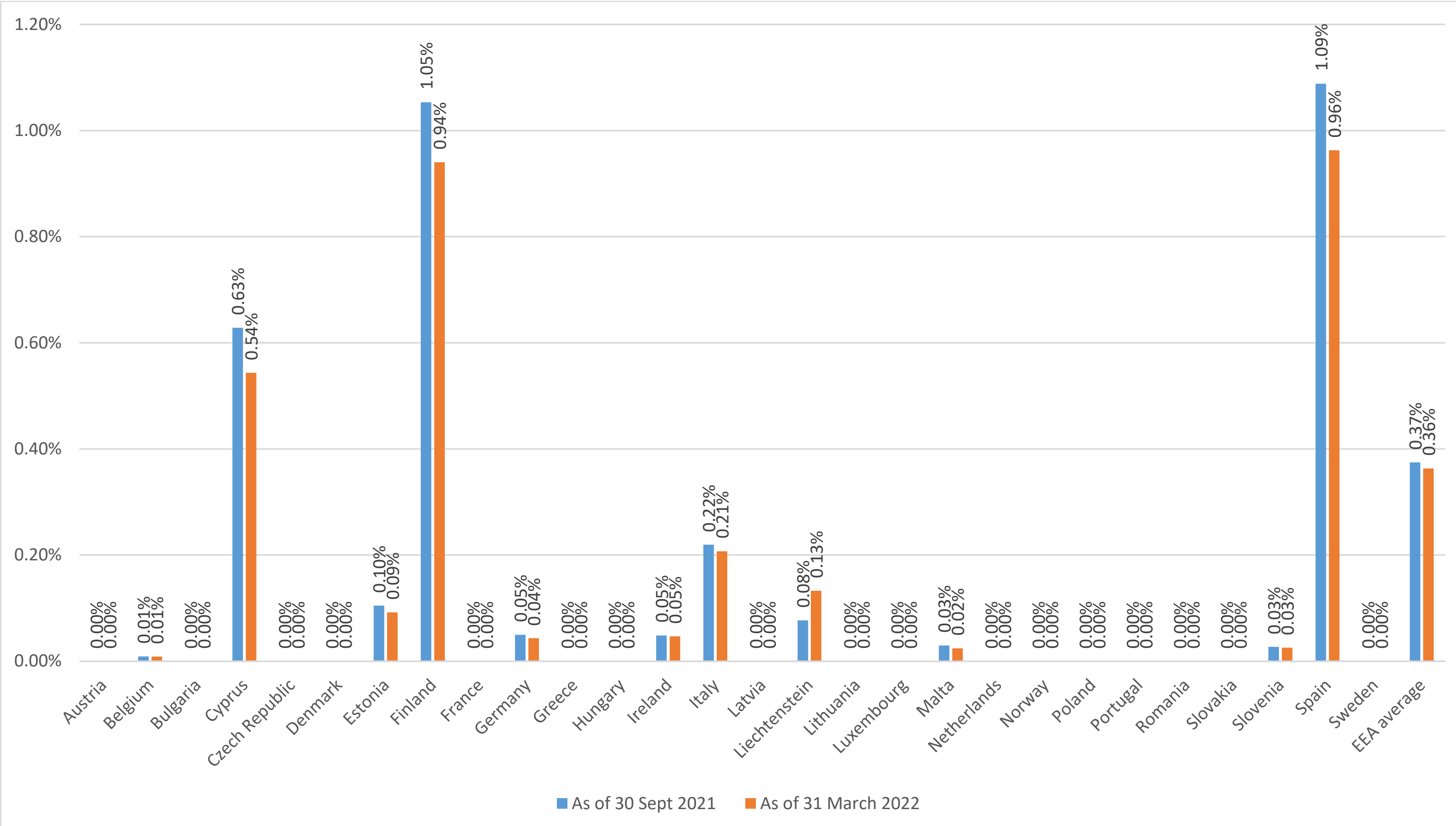


Figure 6: EEA average: percentage of fixed subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of 31 March 2019 – as of 31 March 2022

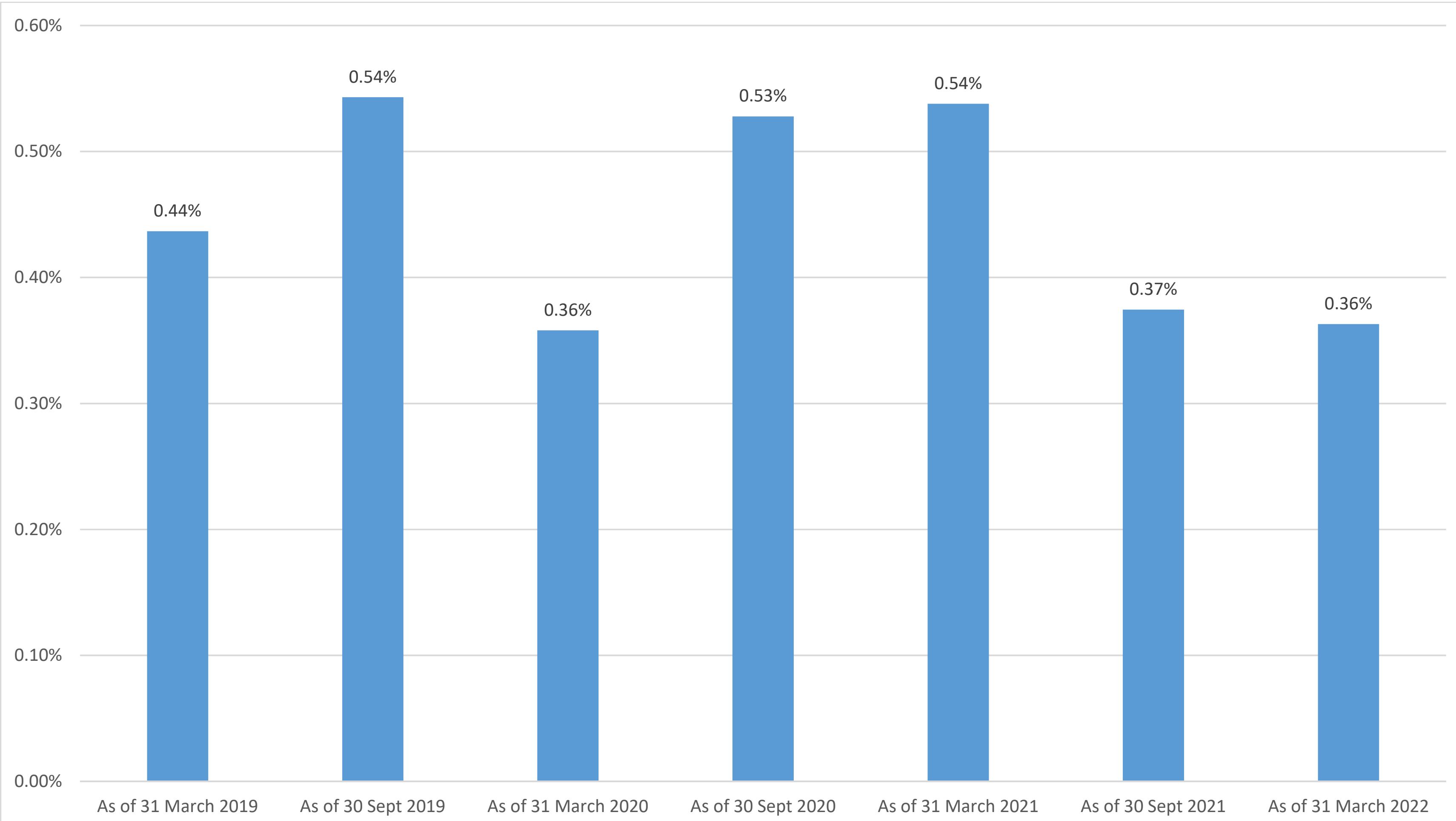
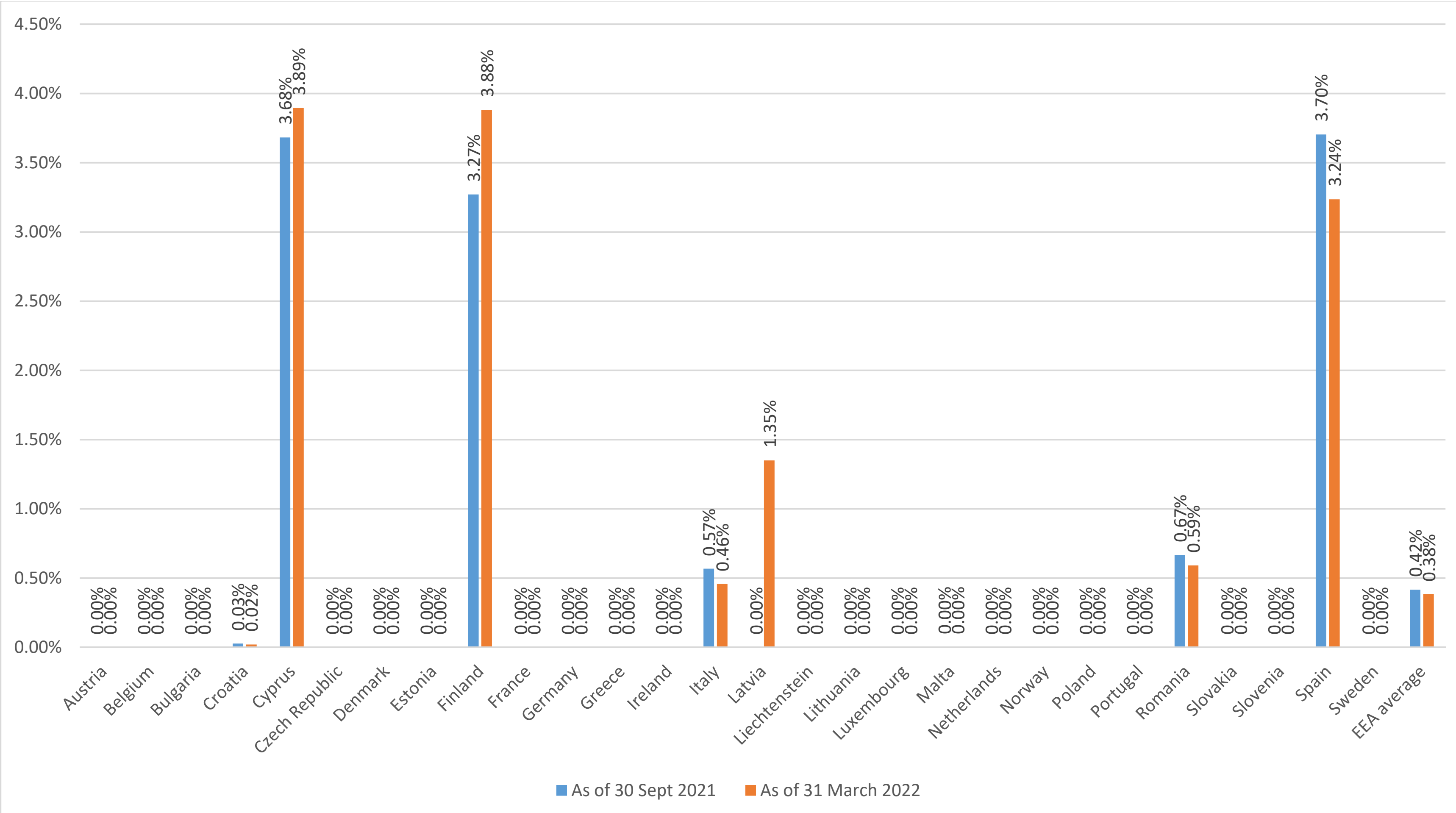
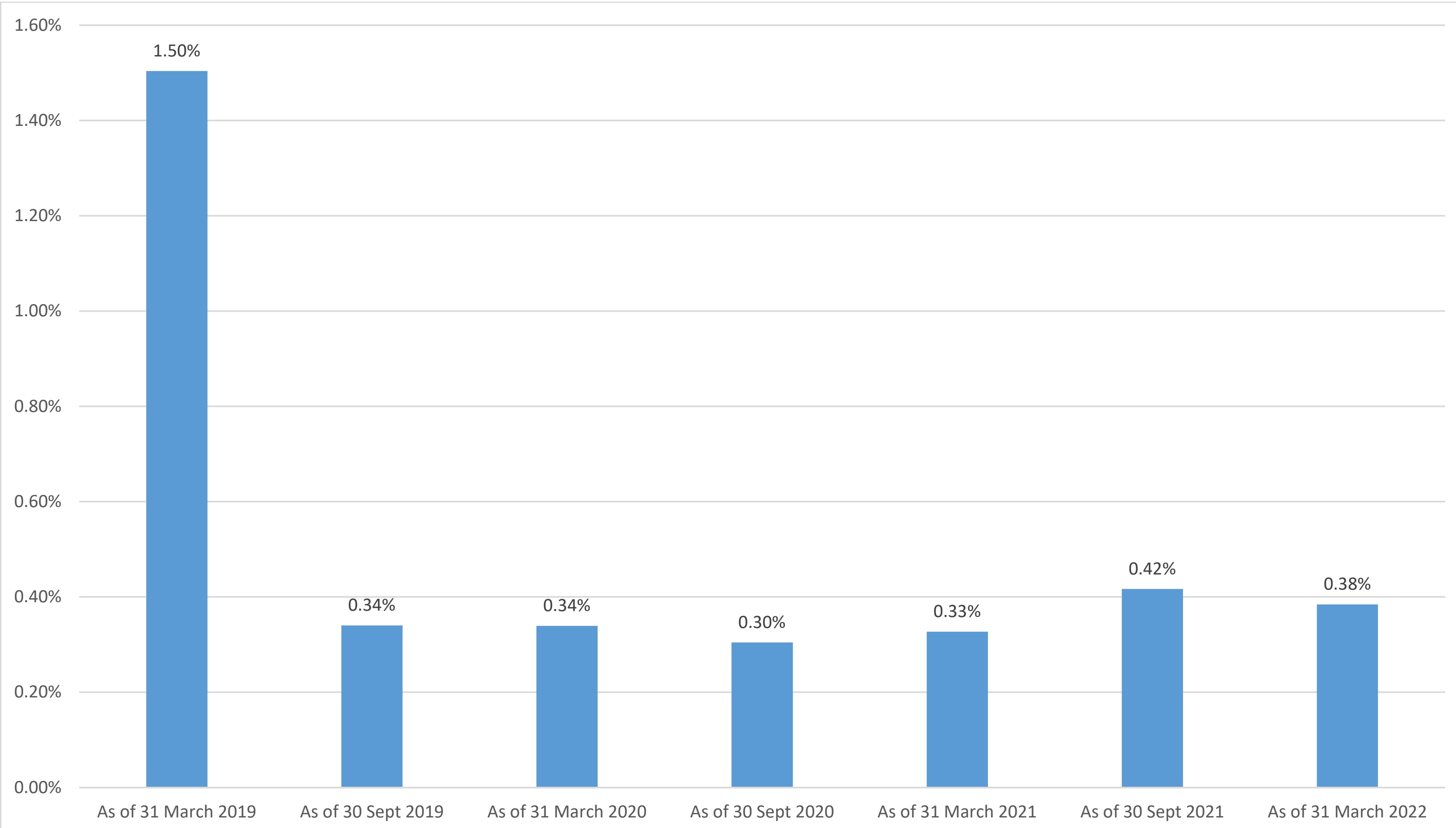


Figure 7: Percentage of mobile subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of September 2021 and as of March 2022.



Hungary confidential.

Figure 8: EEA average: percentage of mobile subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of 31 September 2019 - as of 31 March 2022.



5.2. Volumes of Intra-EU communications services

5.2.1. Volumes of fixed and mobile voices

Figure 9: Fixed intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

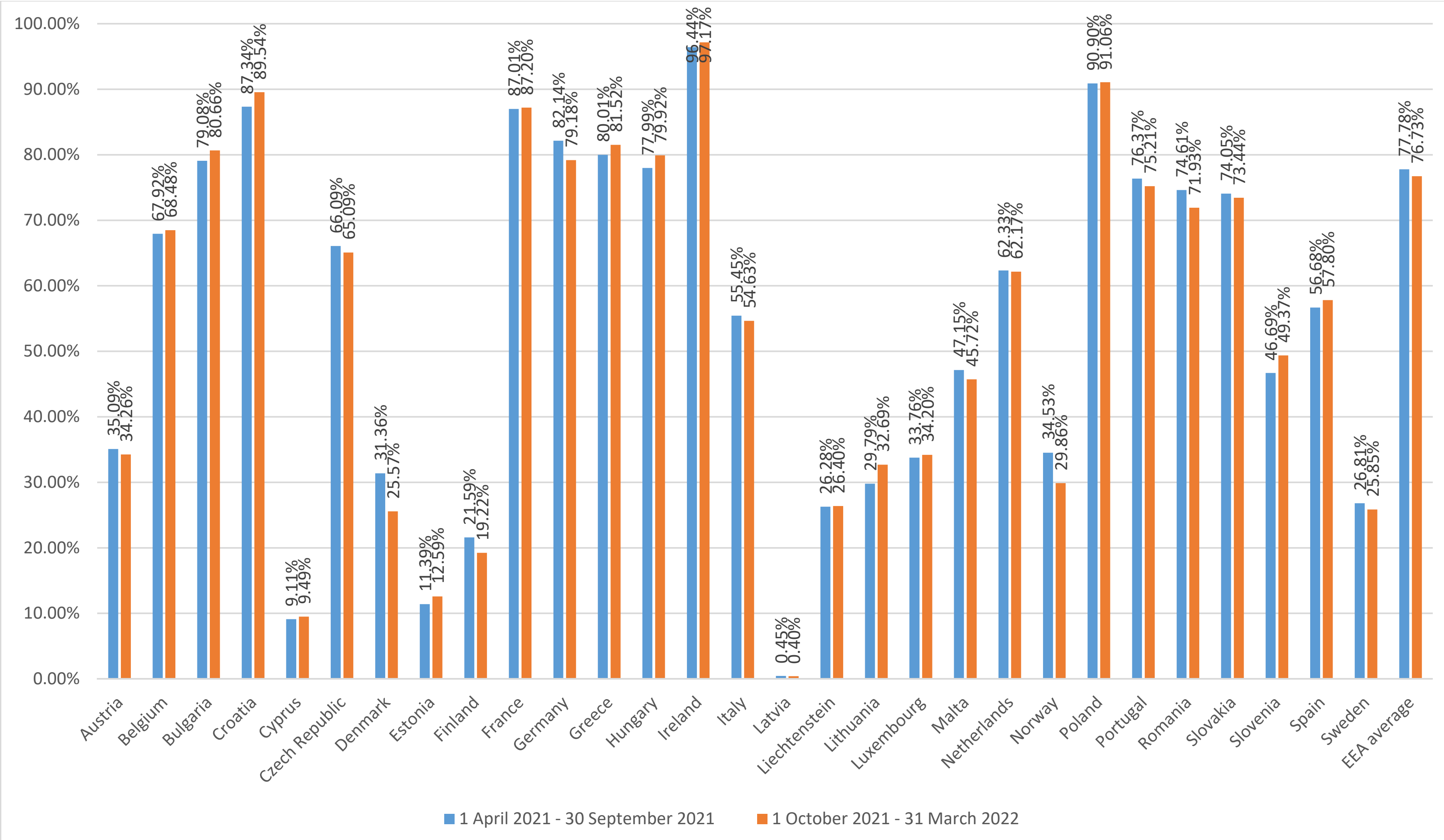


Figure 10: EEA average: fixed intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 October 2018 – 31 March 2022

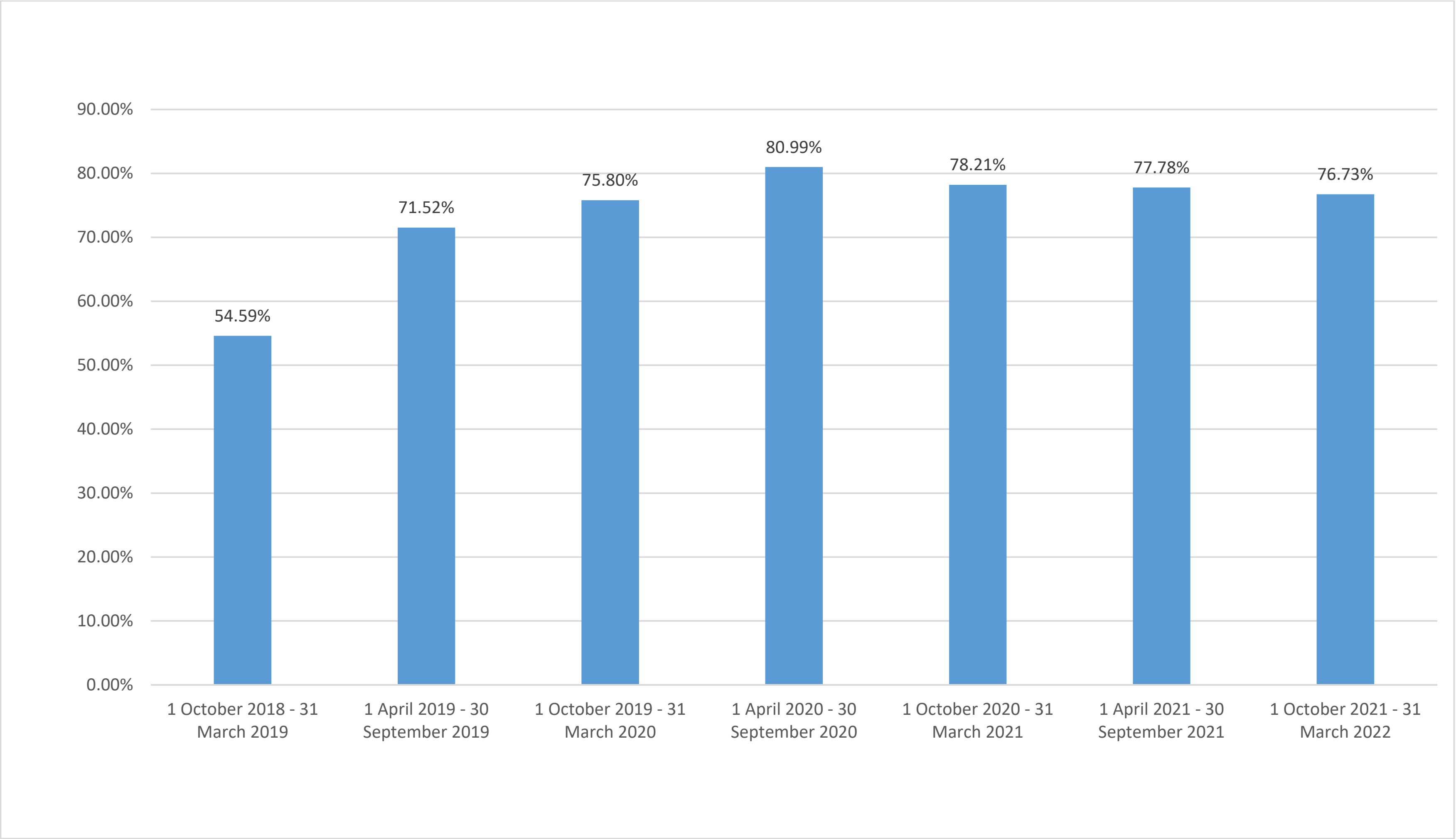


Figure 11: Mobile intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

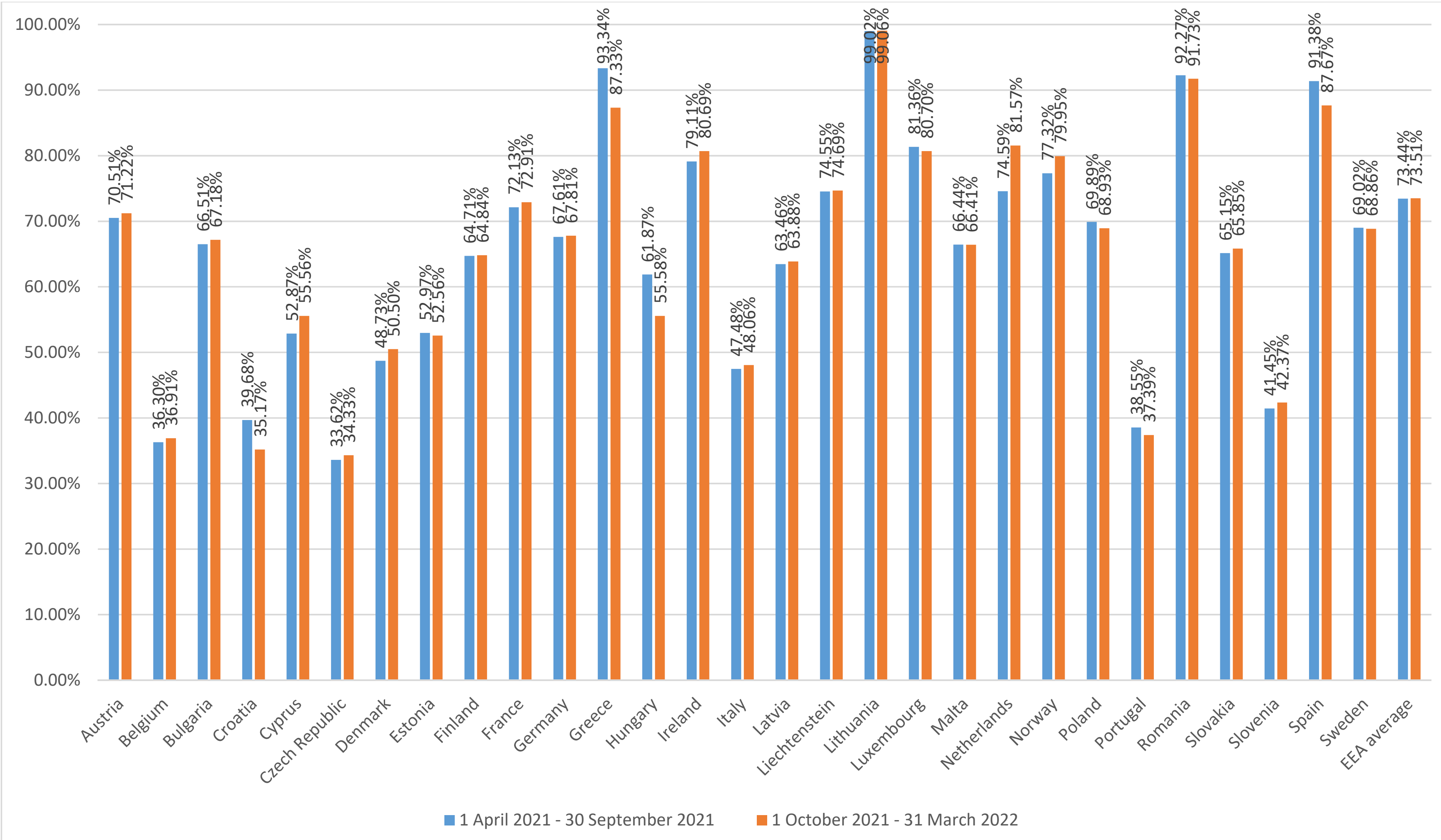


Figure 12: EEA average: Mobile intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 October 2018 – 31 March 2022.

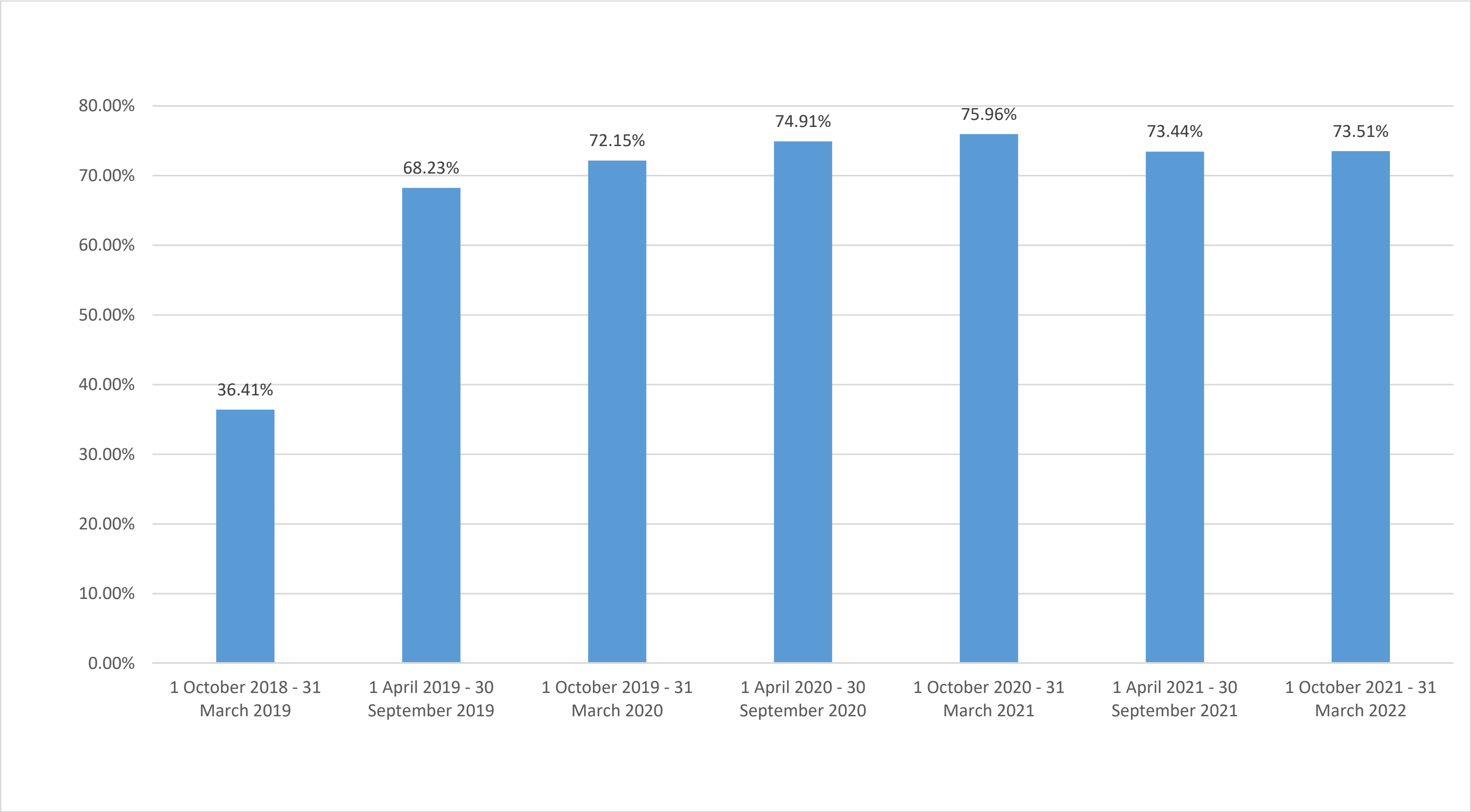


Figure 13: Percentage of fixed price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

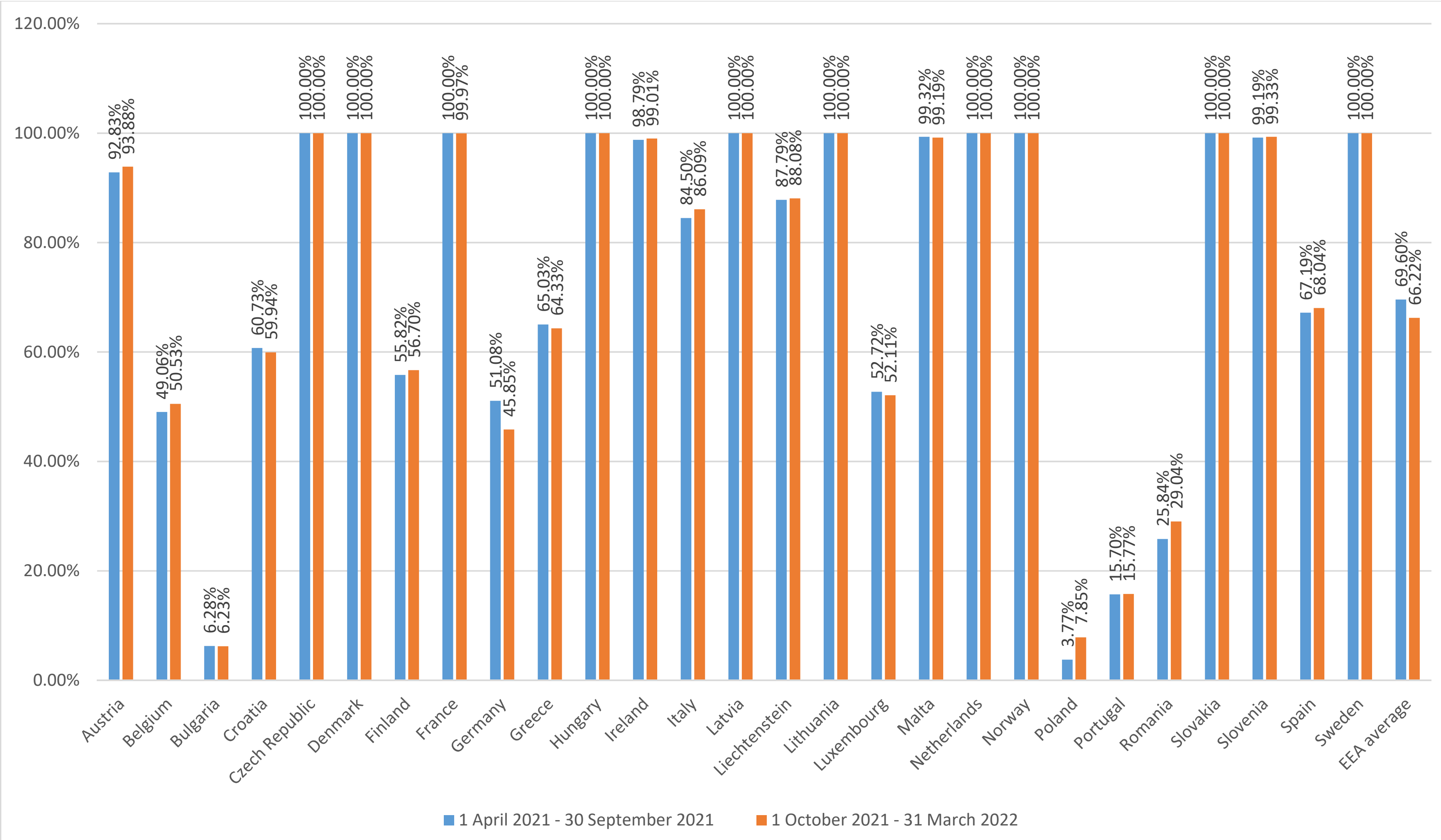


Figure 14: EEA average: percentage of fixed price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 October 2018 – 31 March 2022.

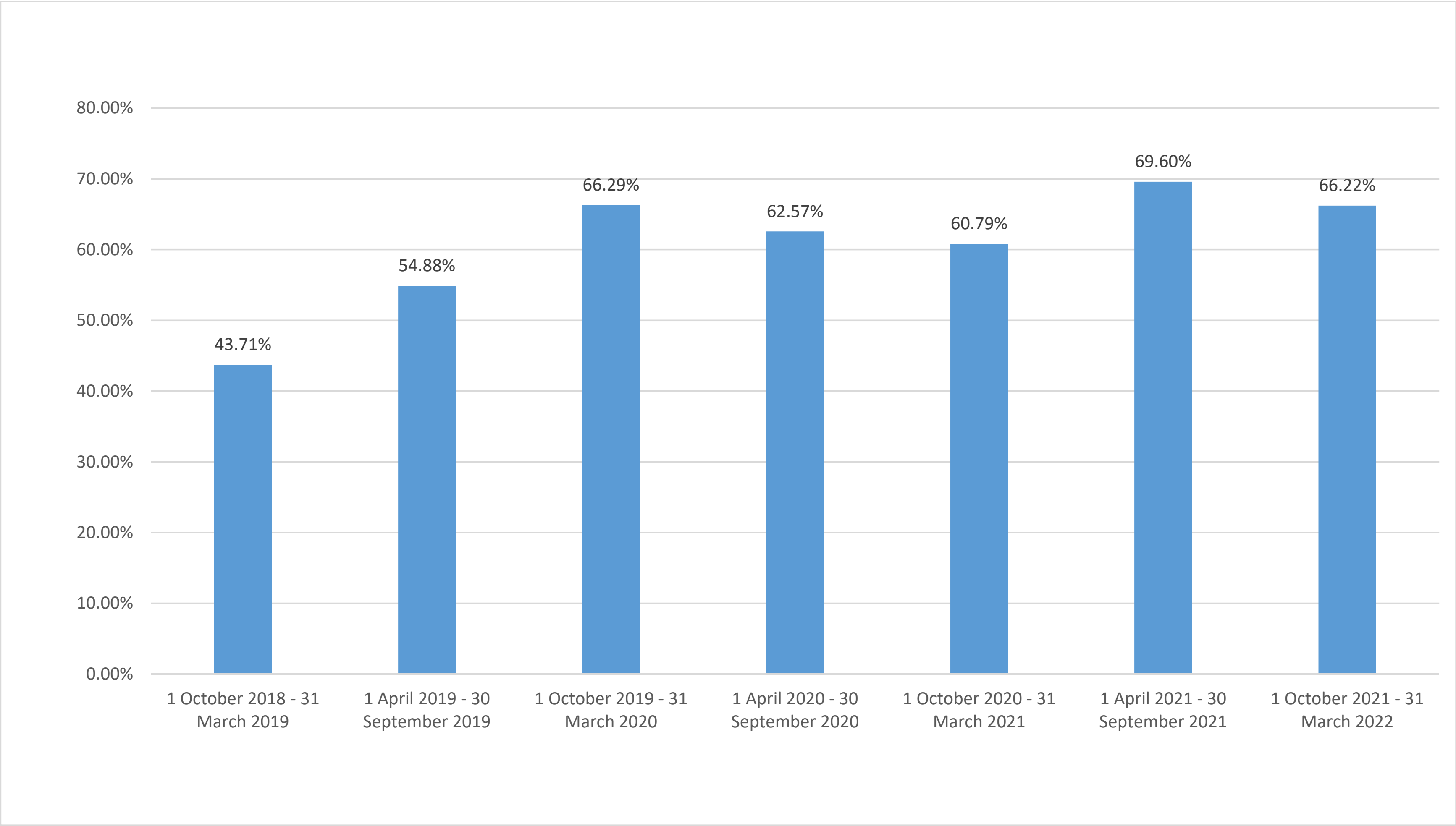
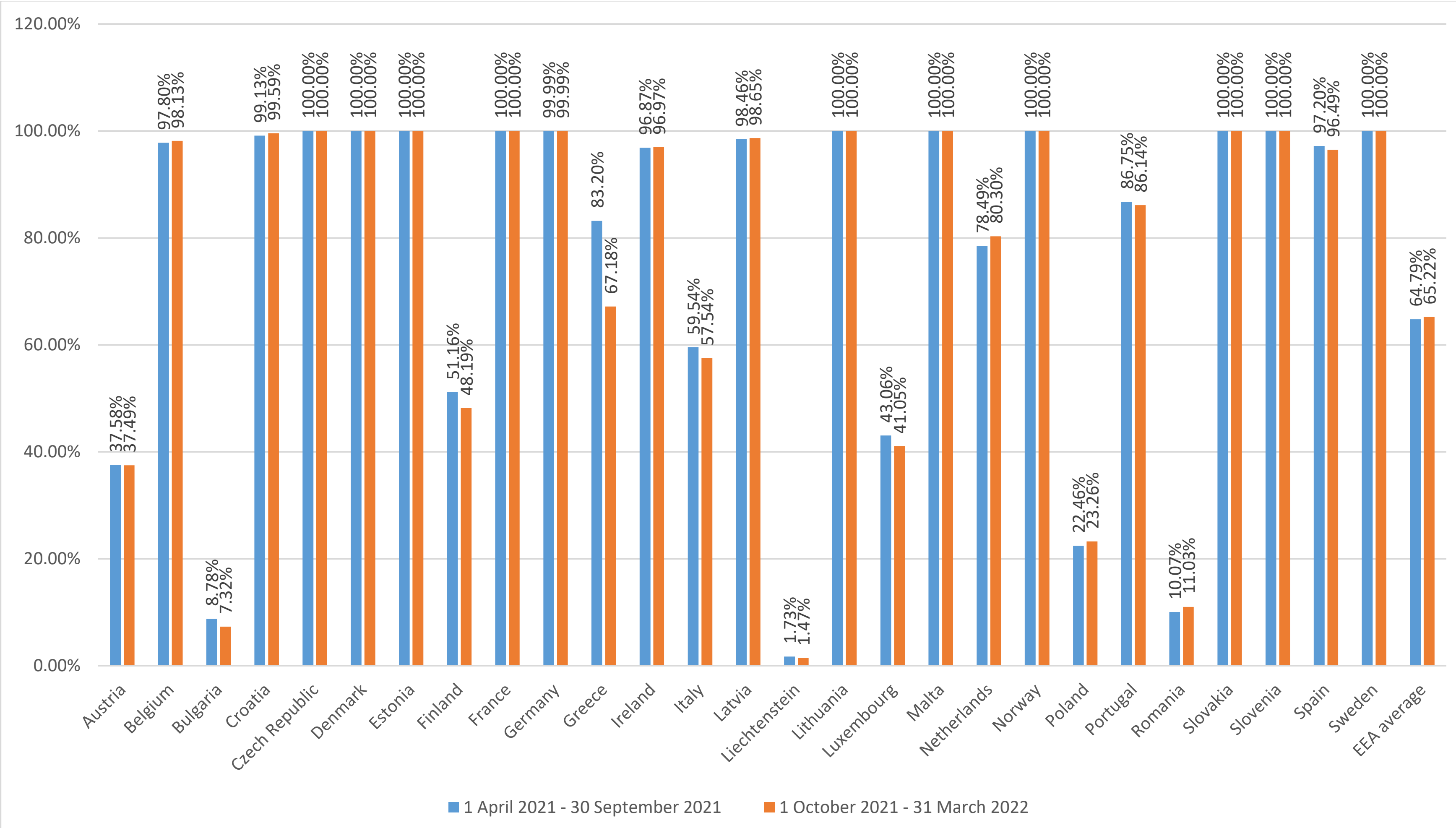
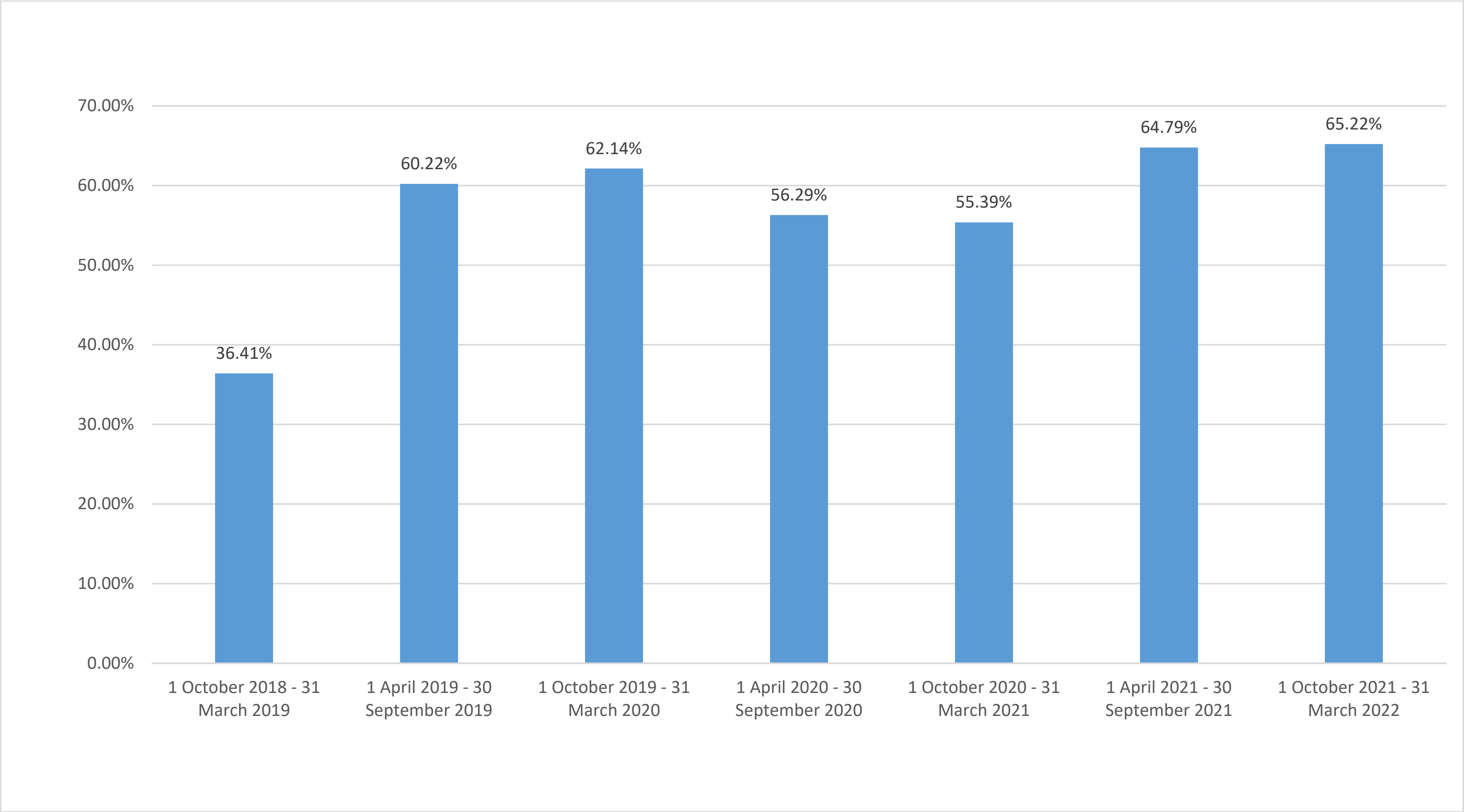


Figure 15: Percentage of mobile price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Hungary confidential.

Figure 16: EEA average: percentage of mobile price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 October 2018 – 31 March 2022.



5.2.2. Volumes of SMS

Figure 17: Percentage of SMS sent by consumers from (vs) total originated intra-EU SMS (consumers + business, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

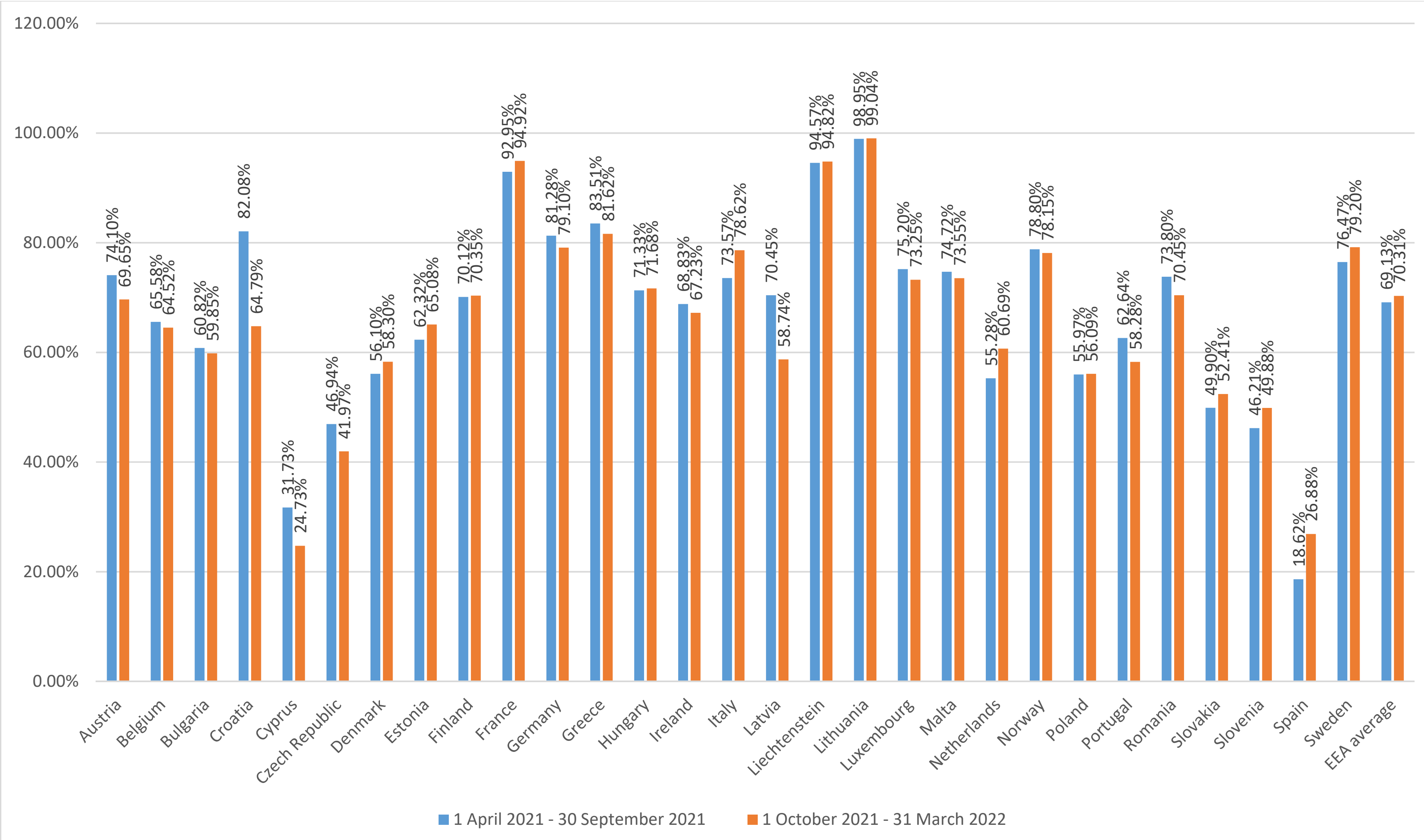


Figure 18: EEA average: percentage of SMS sent by consumers from (vs) total originated intra-EU SMS (consumers + business), 1 October 2018 – 31 March 2022.

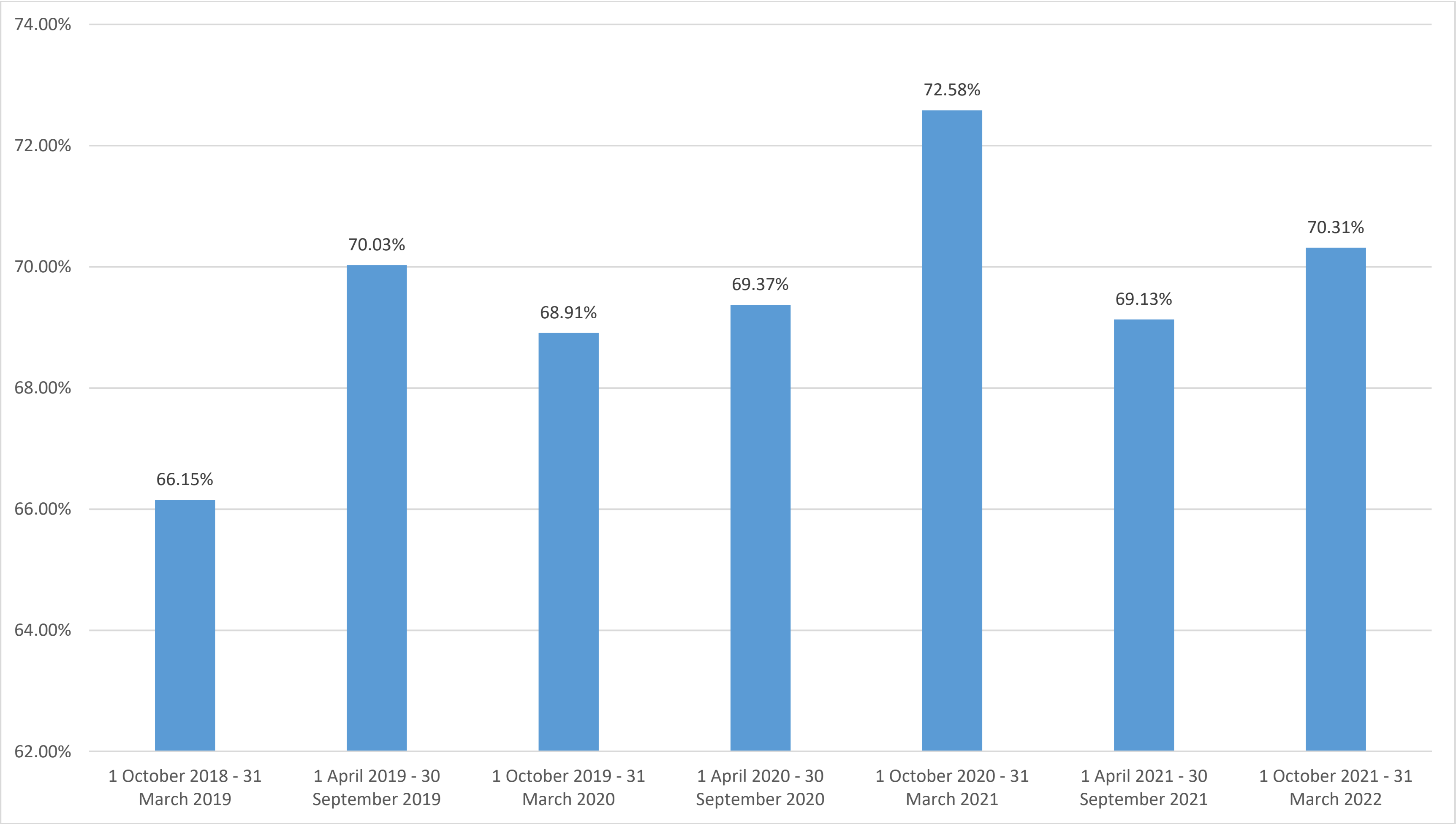
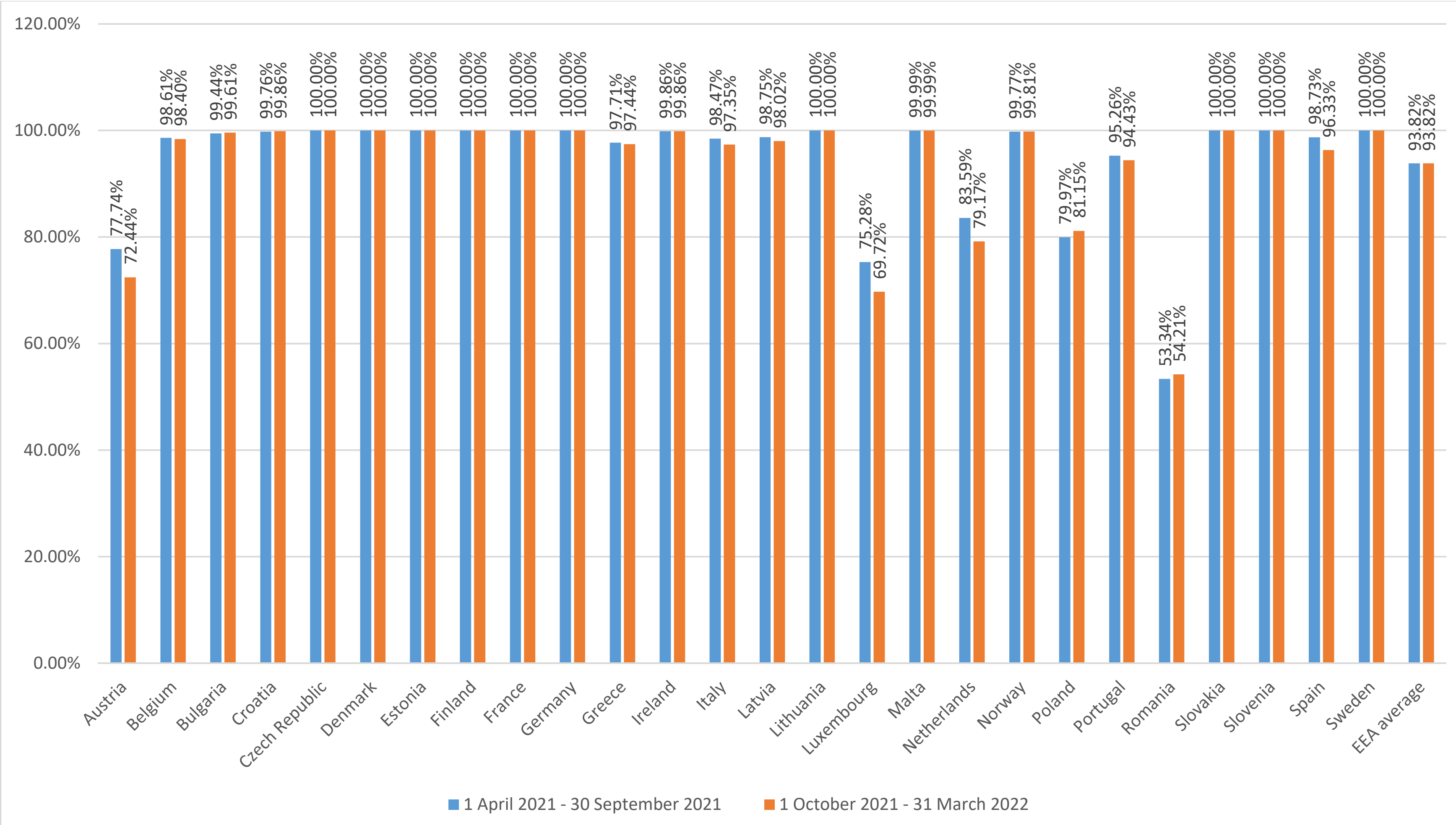
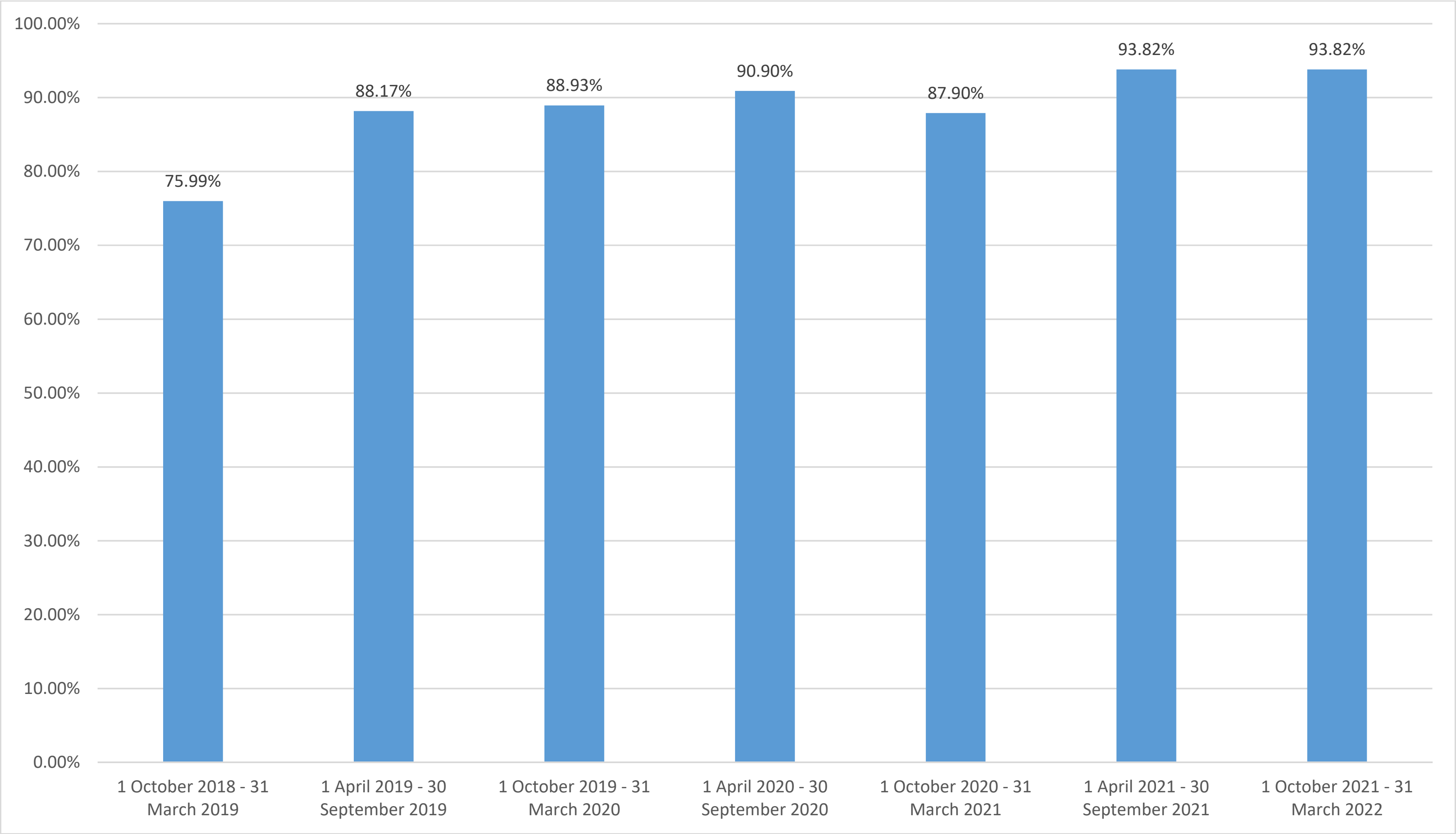


Figure 19: Percentage of price regulated intra-EU communications (vs) total originated intra-EU SMS (consumers only), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Hungary confidential.

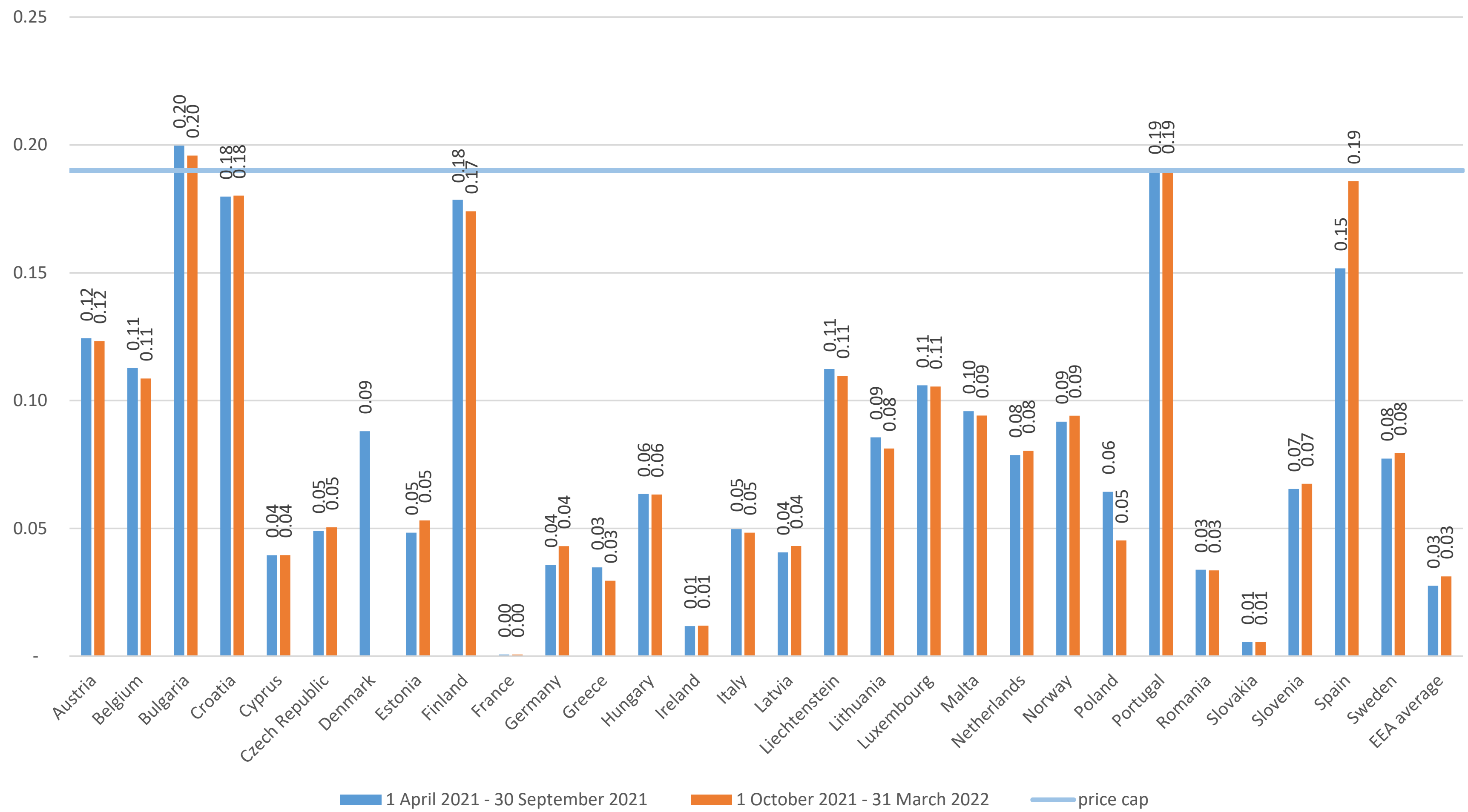
Figure 20: EEA average: percentage of price regulated intra-EU communications (vs) total originated intra-EU SMS (consumers only), 1 October 2018 – 31 March 2022.



5.3. Revenues per unit of Intra-EU communication services

5.3.1. Revenues of fixed and mobile voices

Figure 21: Revenues (in EUR) per fixed min for price regulated intra-EU calls, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption.
Price cap discrepancies happens due to different volumes of actual and billed minutes.

Figure 22: Evolution of EEA average revenues (in EUR) per fixed min for price regulated intra-EU calls, 1 October 2018 - 31 March 2022.

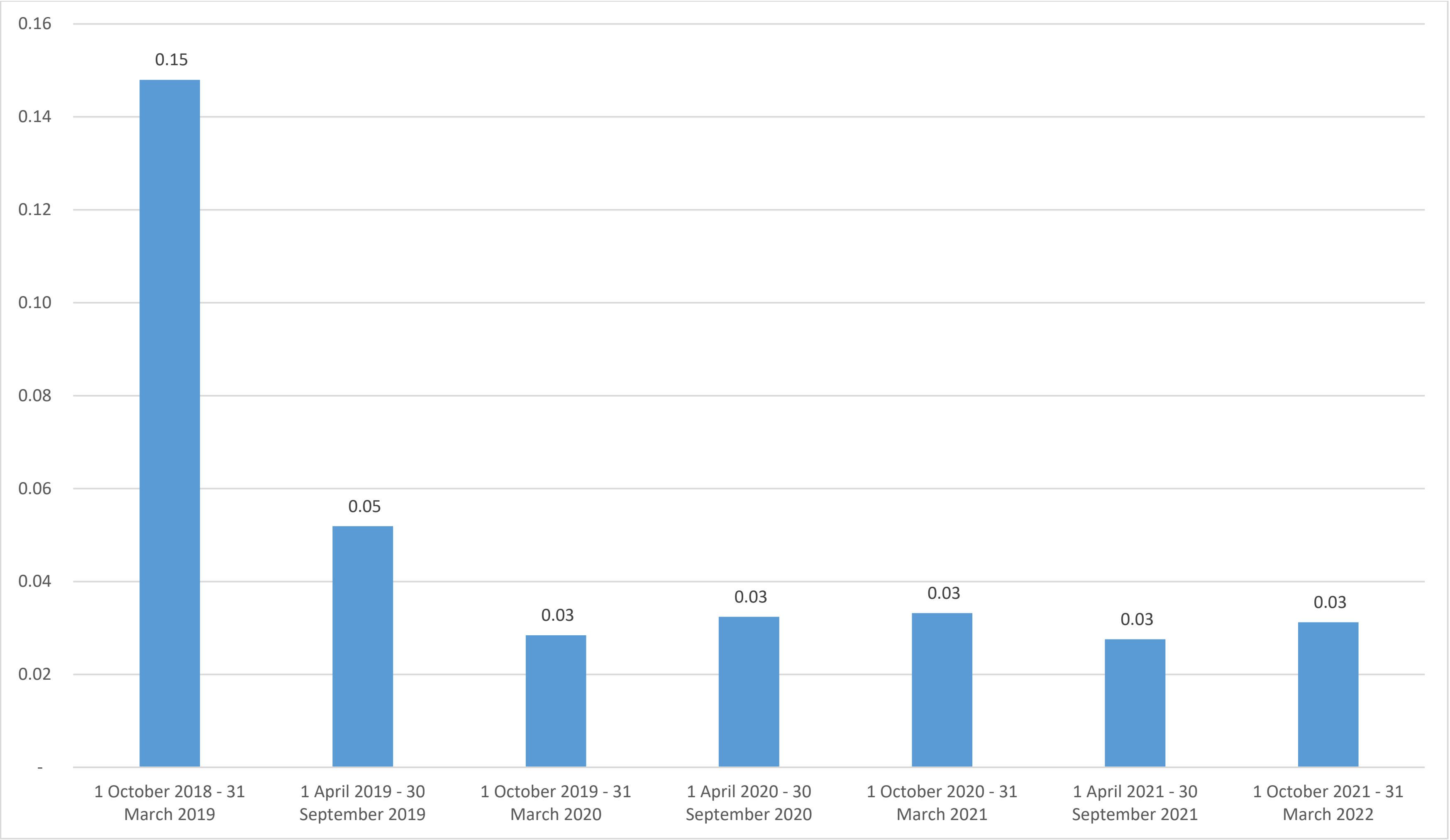
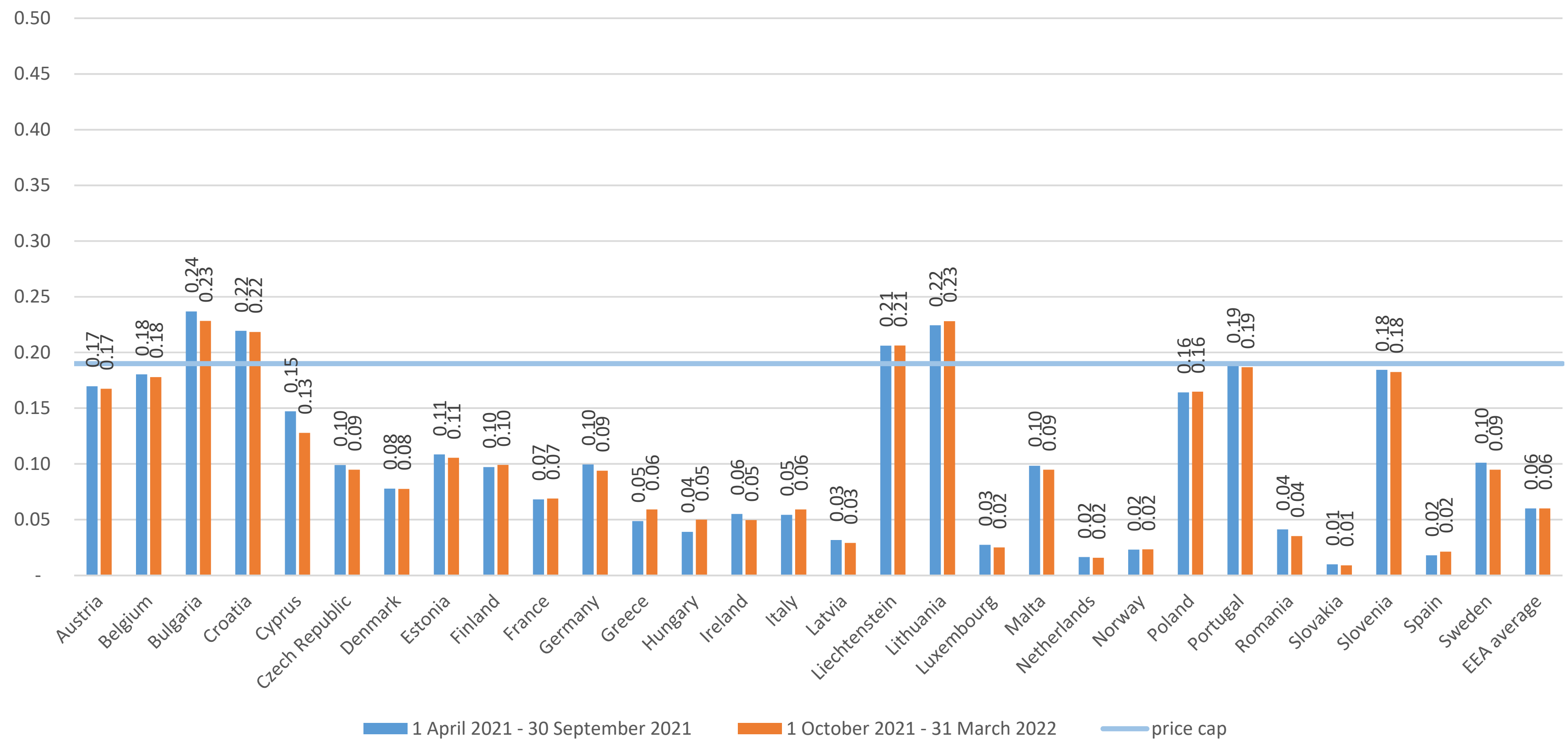


Figure 23: Revenues (in EUR) per mobile min for price regulated intra-EU calls, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption.
Price cap discrepancies happens due to different volumes of actual and billed minutes.
Bulgaria, Liechtenstein: the calculated average prices are above the price cap because of the different volumes of actual and billed minutes. The questionnaire asks operators to provide actual minutes while the revenues are naturally formed from the billed minutes. As the first charging interval is more than 1 second (the most applied is 60 s. interval), the billed minutes are more than the actual minutes. This is the reason why the calculated average price is above the price cap (operators apply the maximum retail price for Intra EEA calls made – 0.19 EUR per min).

Figure 24: Evolution of EEA average revenues (in EUR) per mobile min for price regulated intra-EU calls, 1 October 2018 - 31 March 2022.

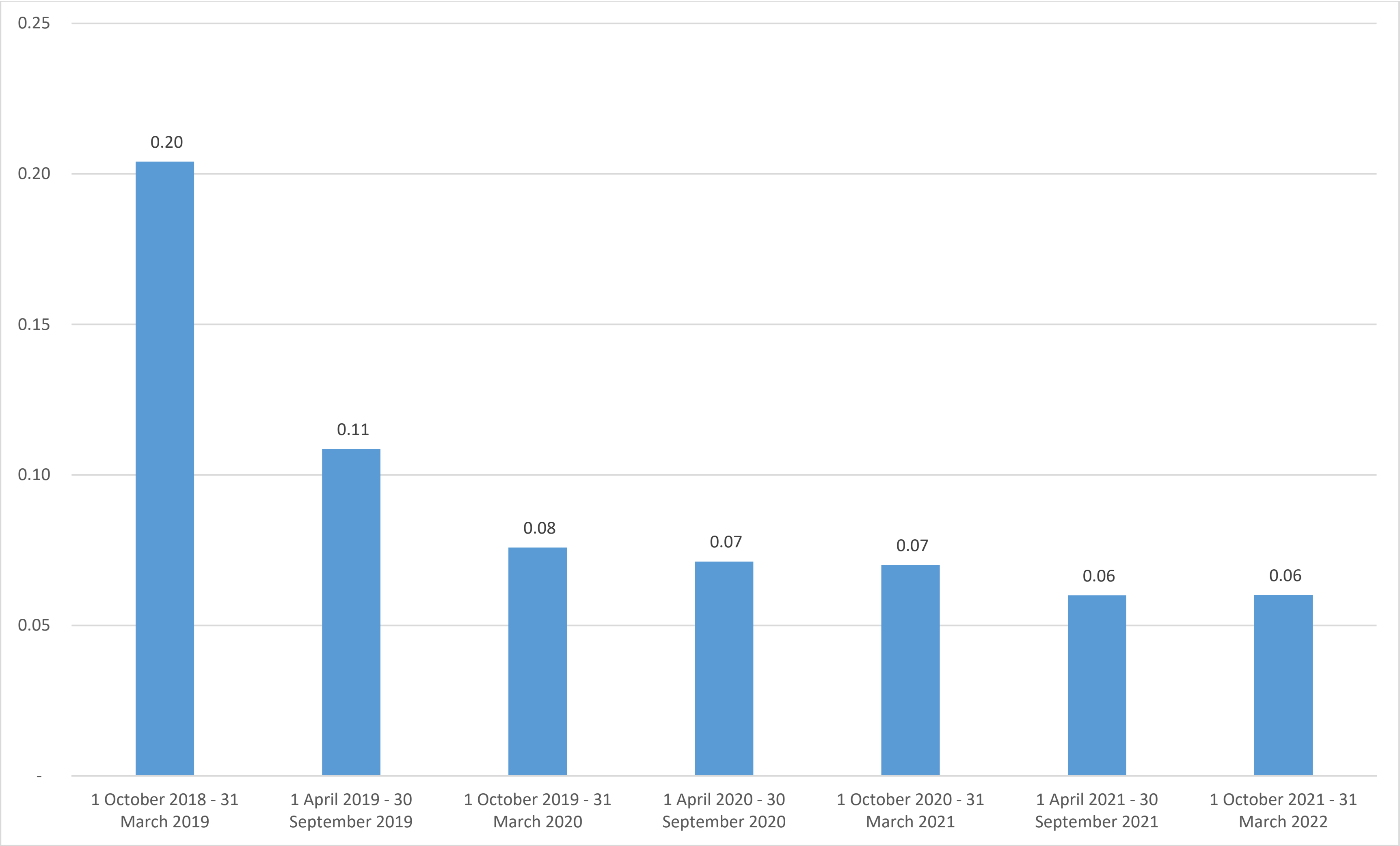
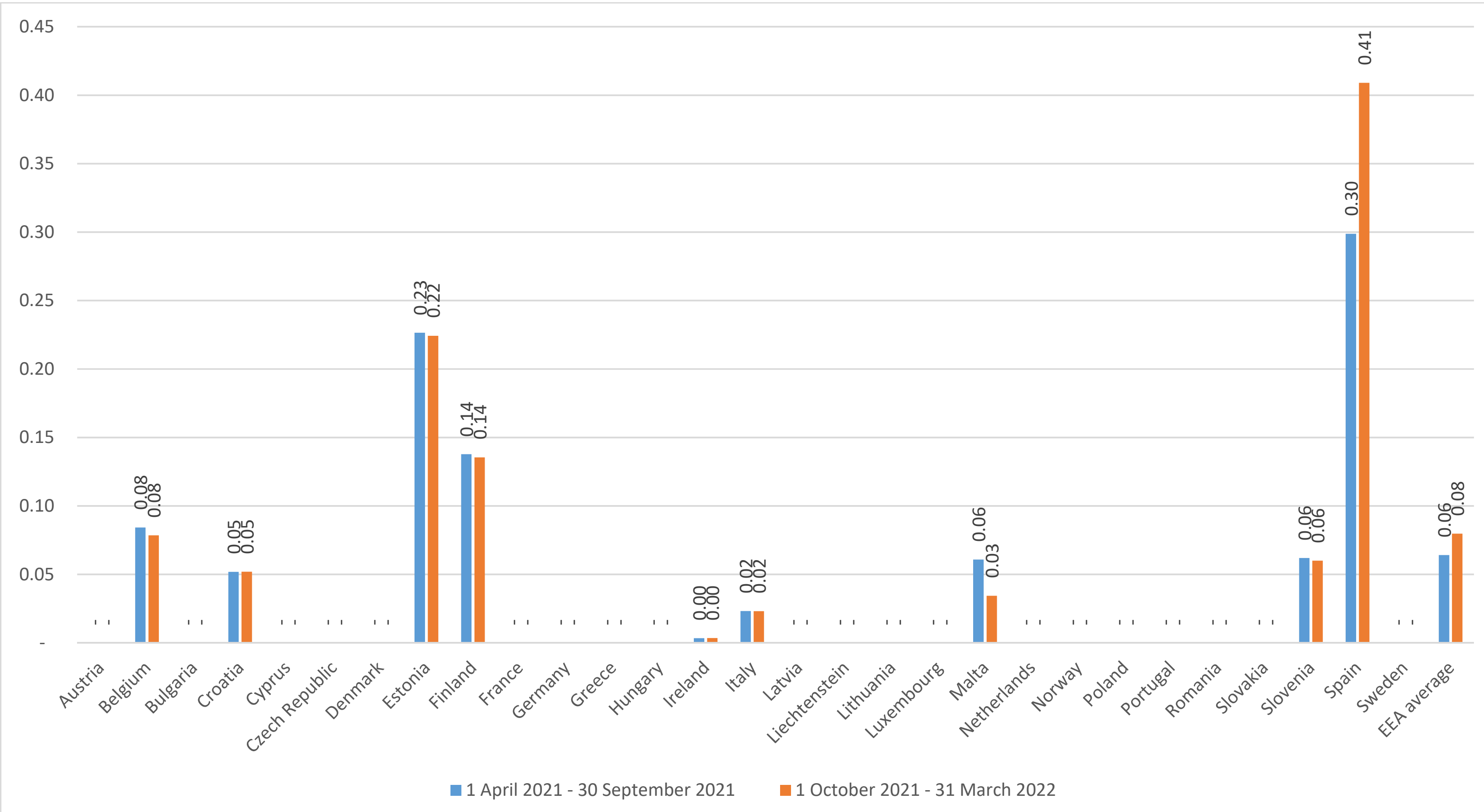


Figure 25: Revenues (in EUR) per fixed min for intra-EU calls from alternative tariffs, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Only few of the EU operators are offering alternative plans for fixed network regulated international communications.
Malta: In the second period there were changes in tariffs mapped as alternative.

Figure 26: Evolution of EEA average revenues (in EUR) per fixed min for intra-EU calls from alternative tariffs, 1 October 2018 - 31 March 2022:

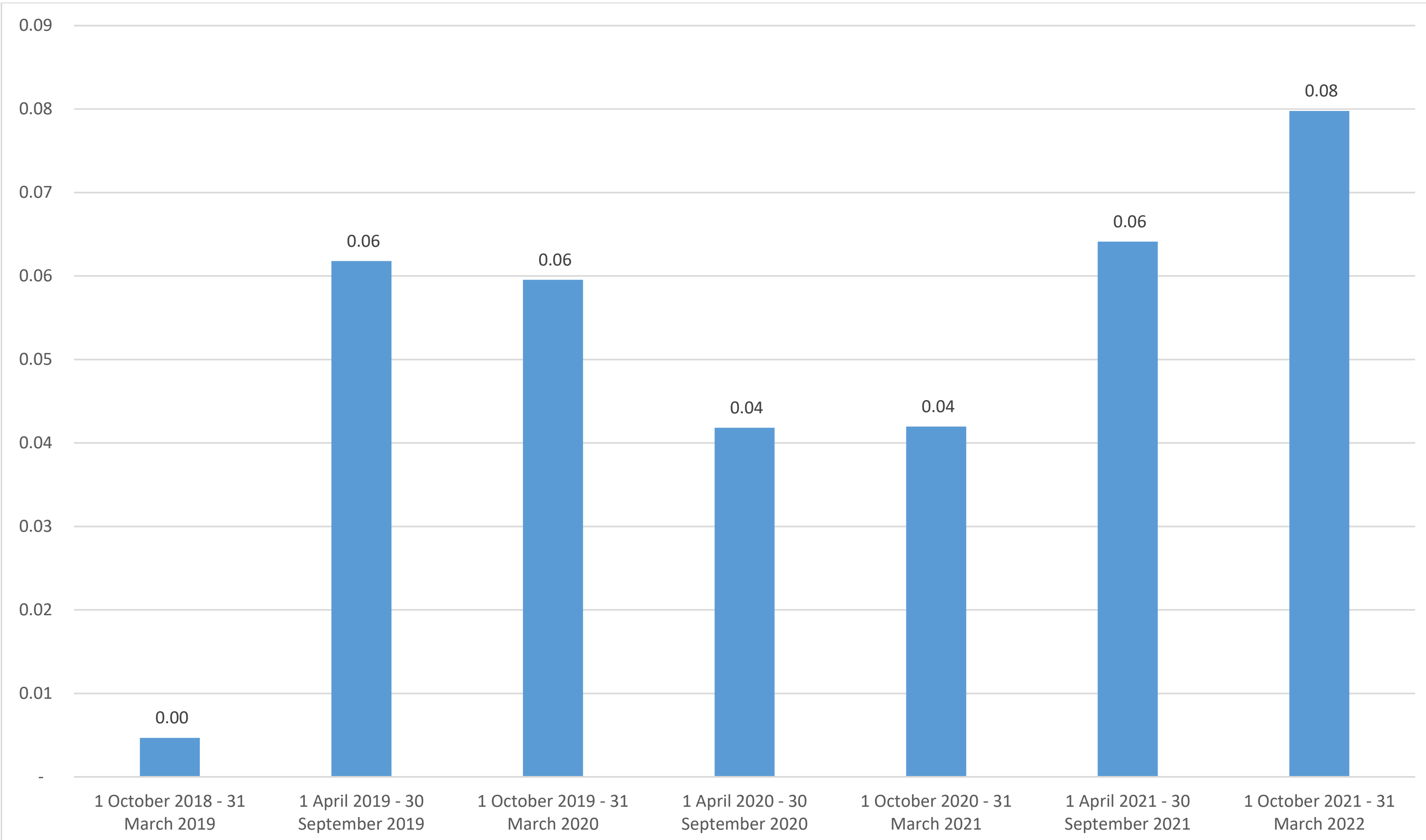
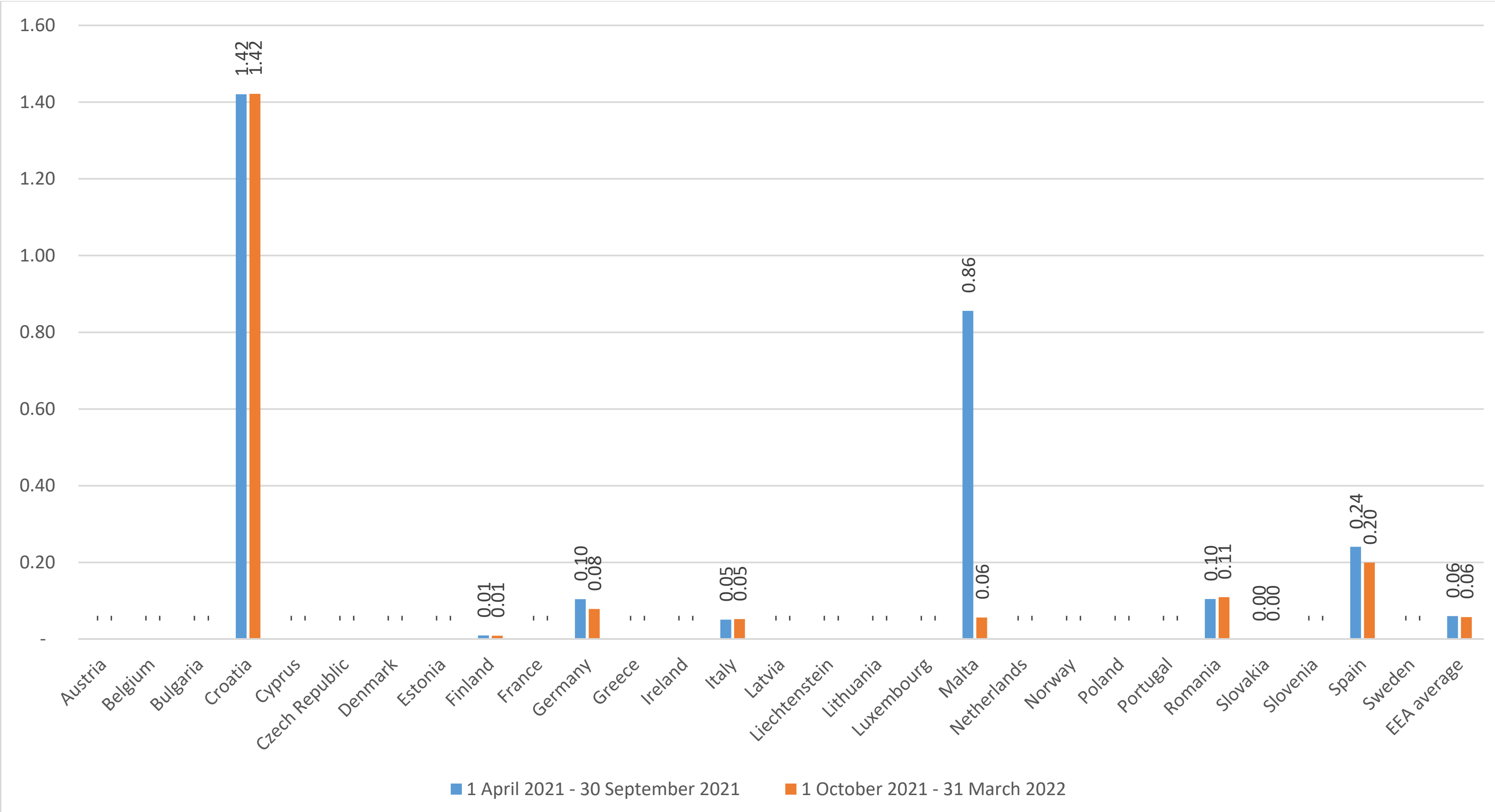
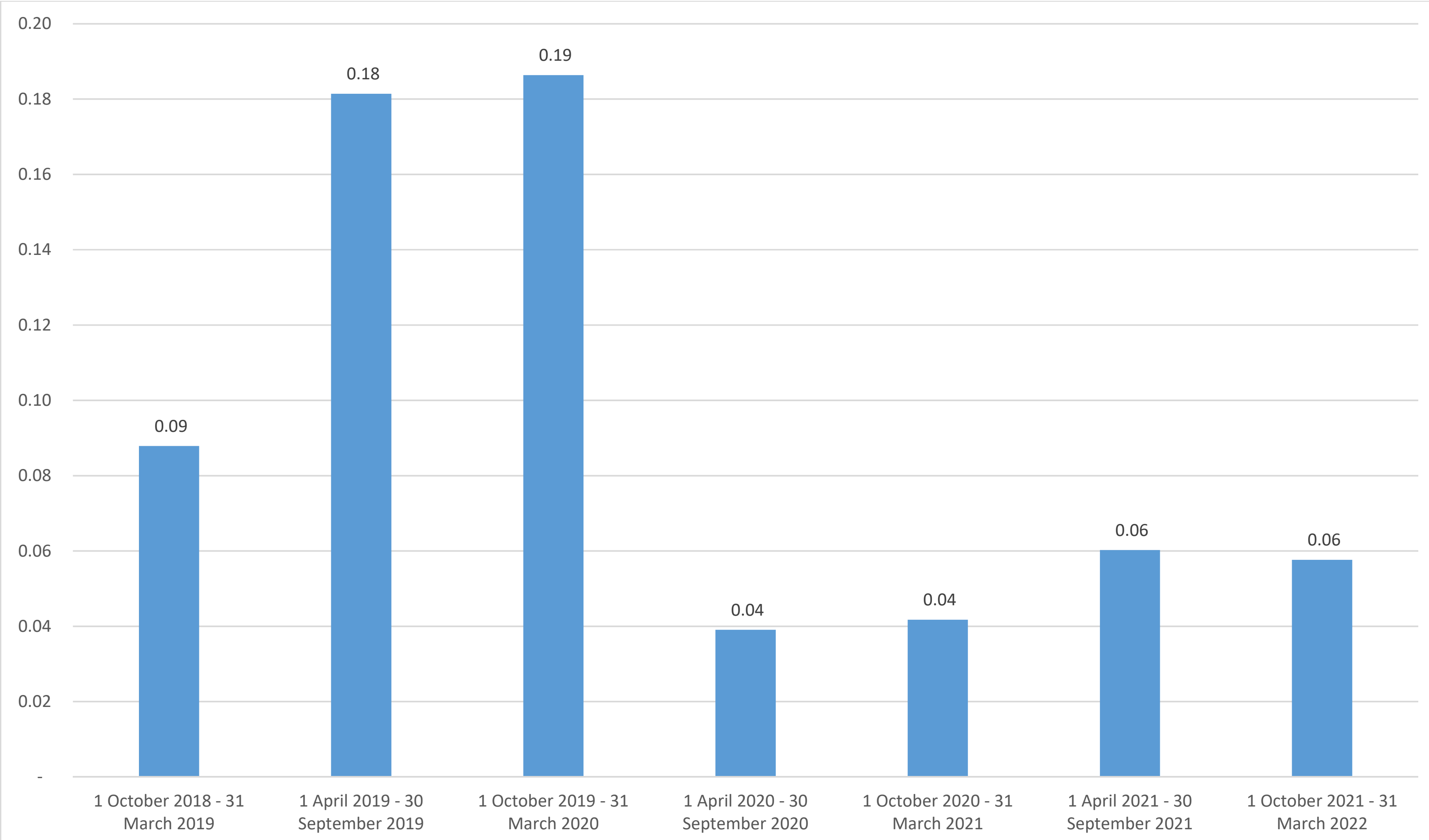


Figure 27: Revenues (in EUR) per mobile min for intra-EU calls from alternative tariffs, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



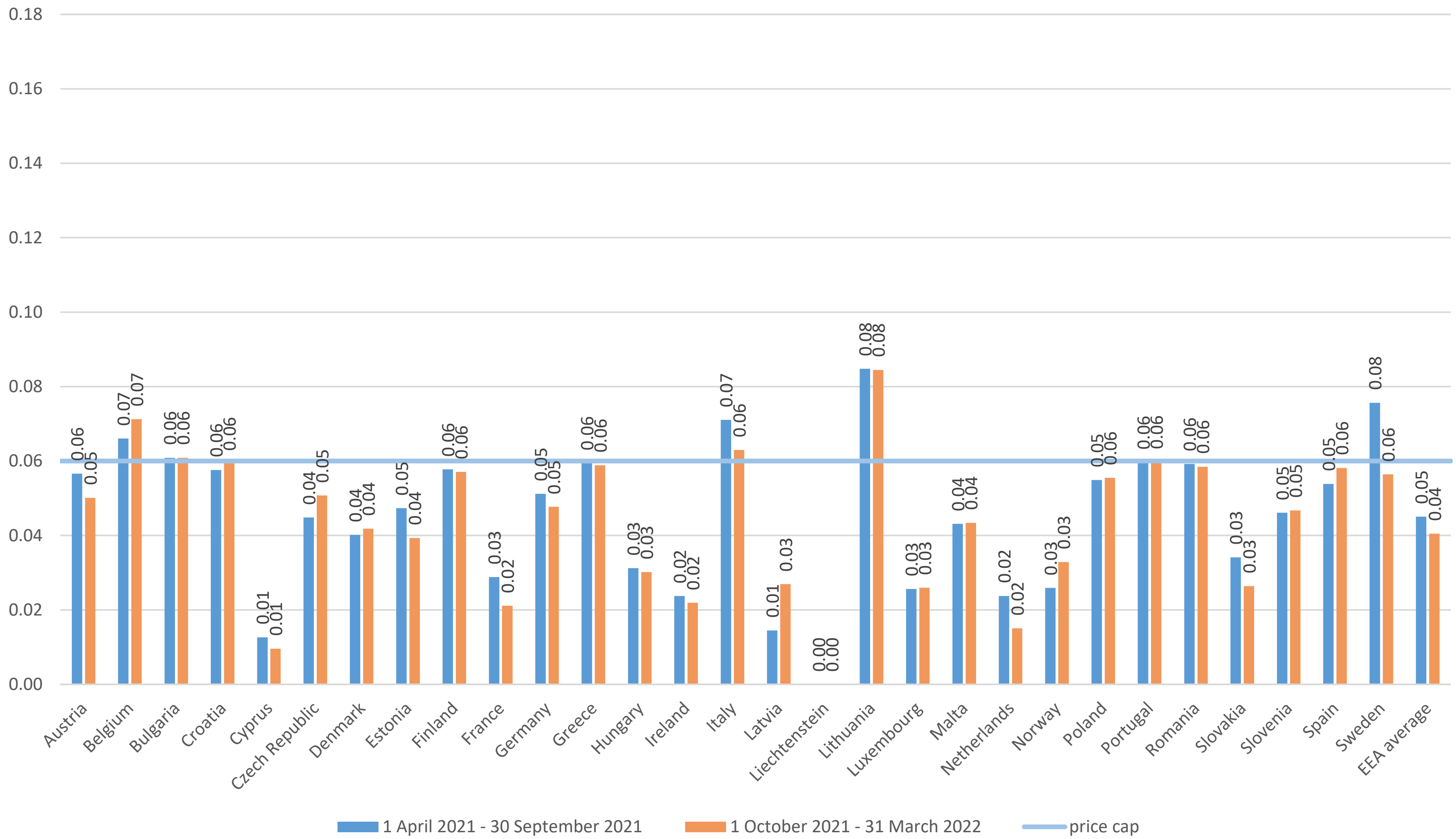
Hungary confidential.
Only few of the EU operators are offering alternative plans for mobile network regulated international communications.
Malta: In the second period there were changes in tariffs mapped as alternative.

Figure 28: Evolution of EEA average revenues (in EUR) per mobile min for intra-EU calls from alternative tariffs, 1 October 2018 - 31 March 2022.



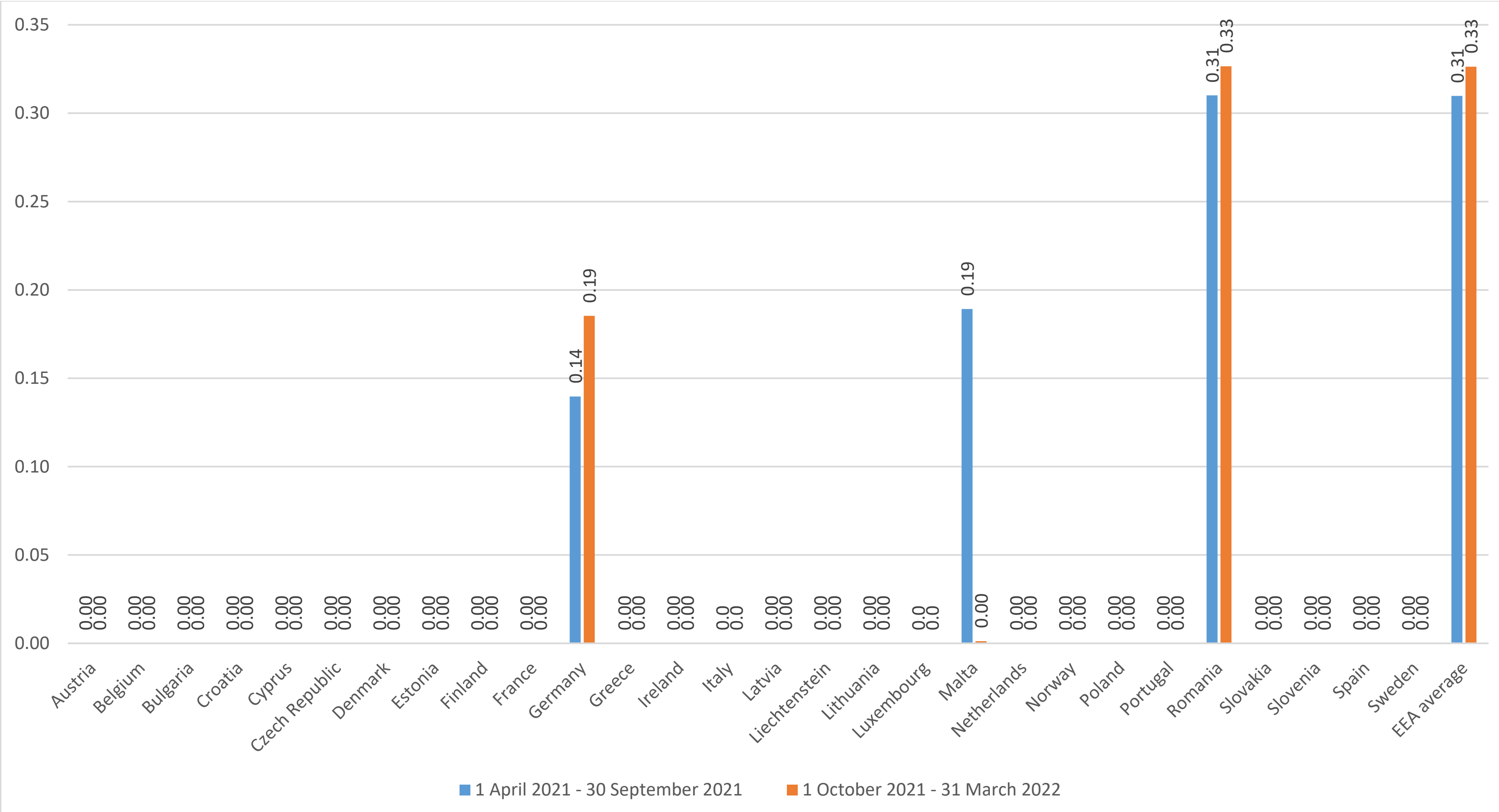
5.3.2. SMS revenues

Figure 29: Revenues per SMS for price regulated intra-EU messages, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Price cap discrepancies happens due to operators' technical reasons (core networks' migration, etc.) to provide revenues/volumes of SMS.

Figure 30: Revenues per SMS for intra-EU messages from alternative tariffs, 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.



Only few of the EU operators are offering alternative plans for mobile network regulated international communications.
Malta: In the second period there were changes in tariffs mapped as alternative.
Hungary confidential.

5.4. Consumption patterns (fixed, mobile voice and SMS)

Figure 31: Average number of fixed Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

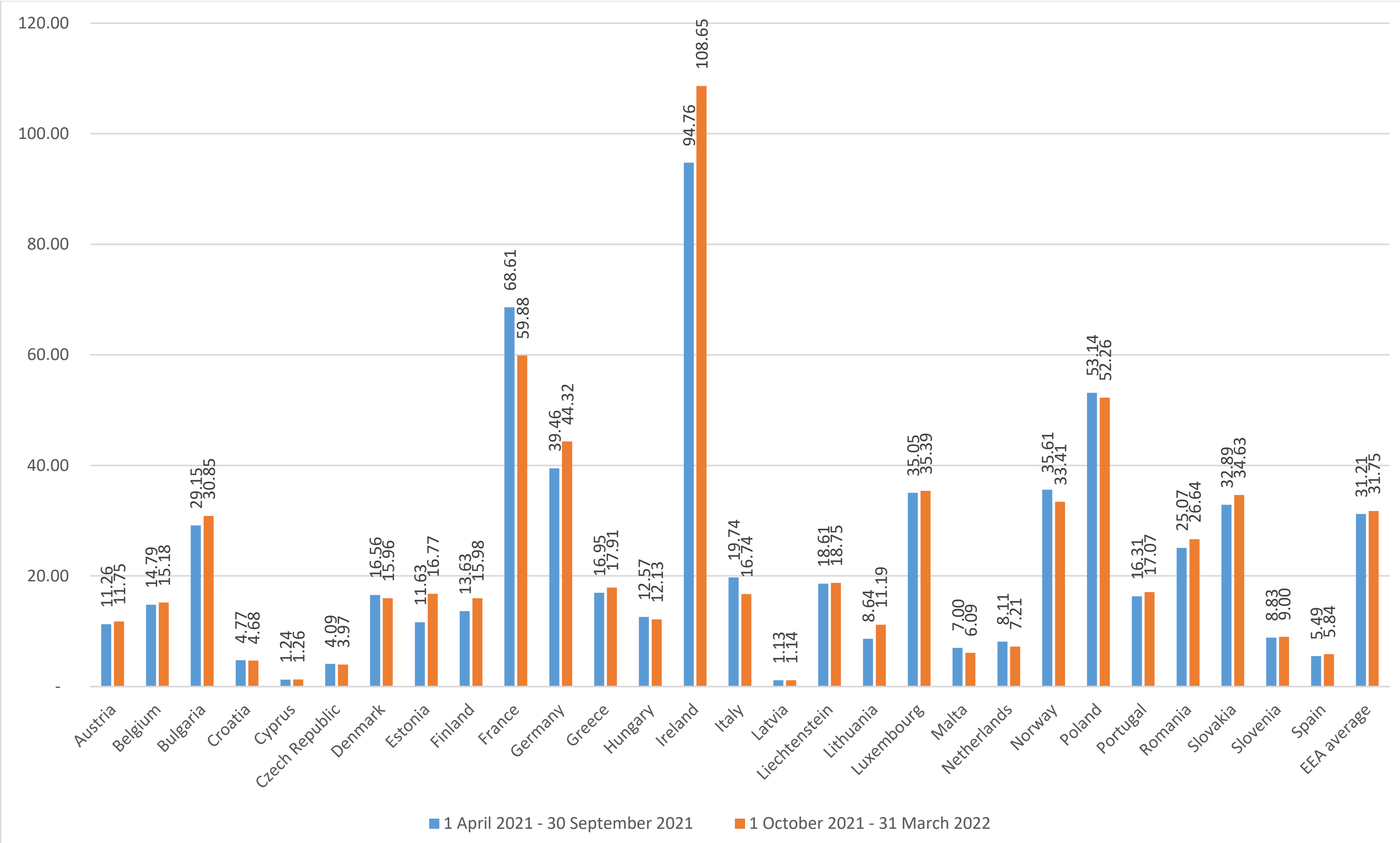


Figure 32: EEA average number of fixed Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 - 31 March 2022.

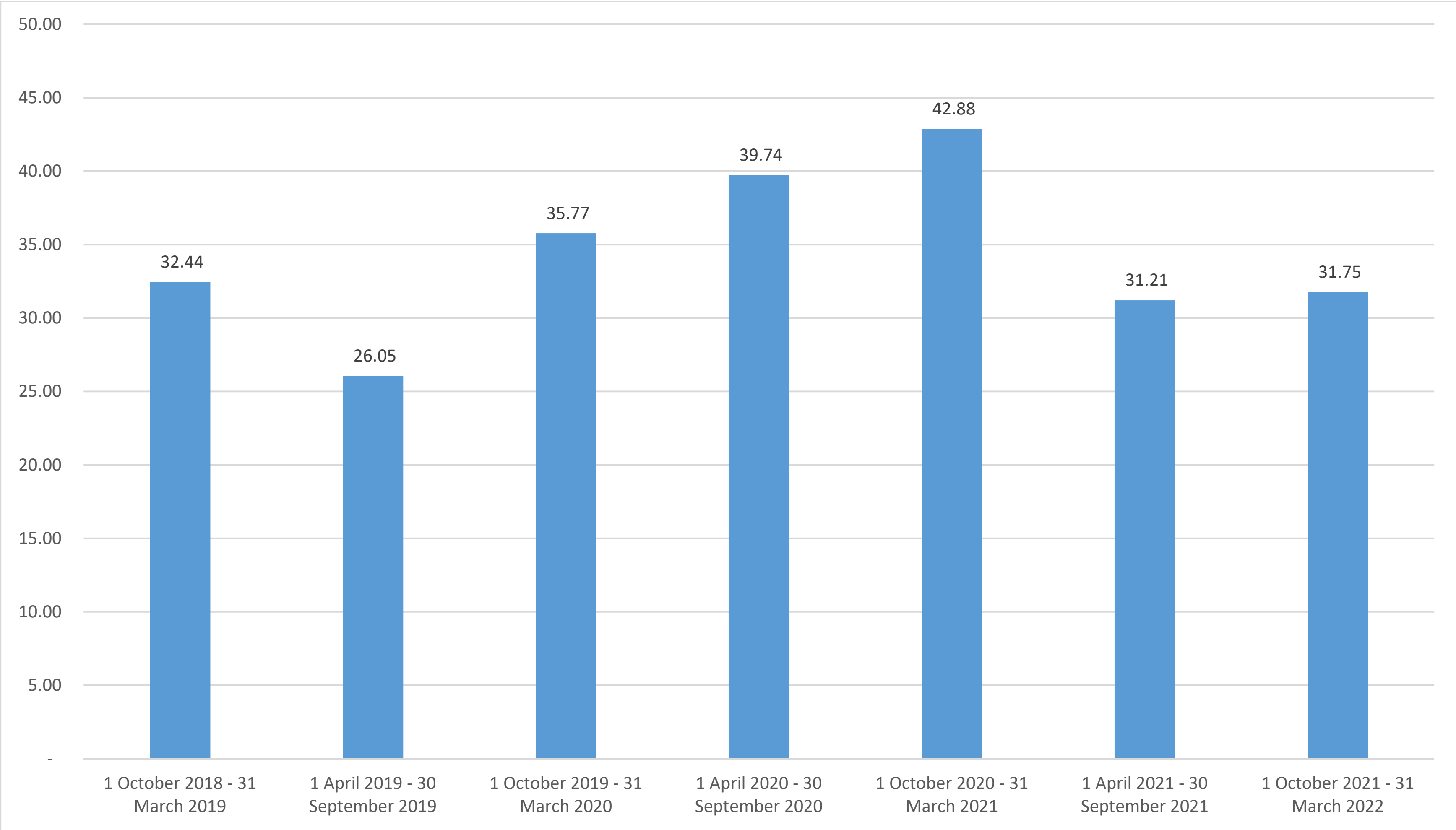


Figure 33: Average number of mobile Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

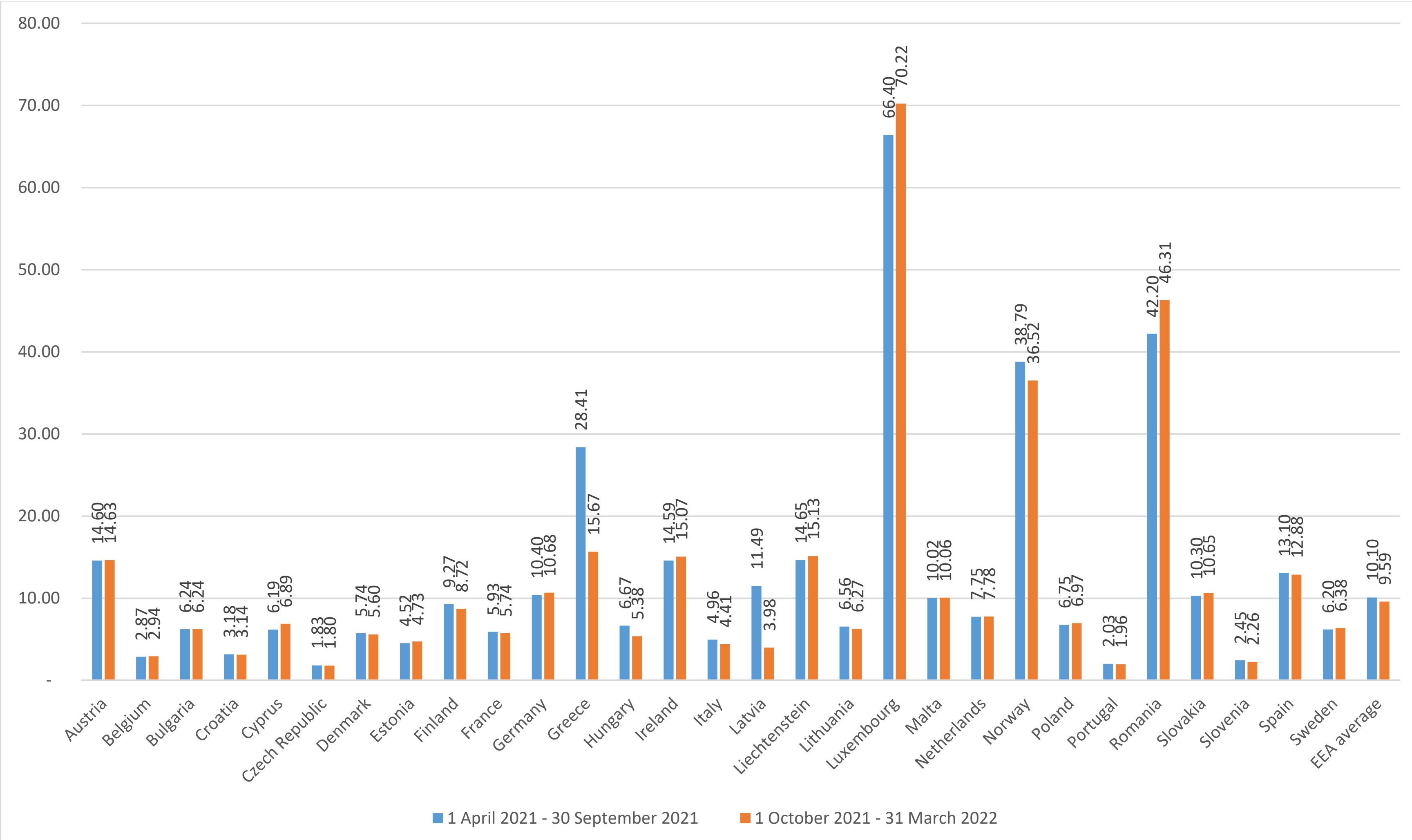


Figure 34: EEA average number of mobile Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 - 31 March 2022.

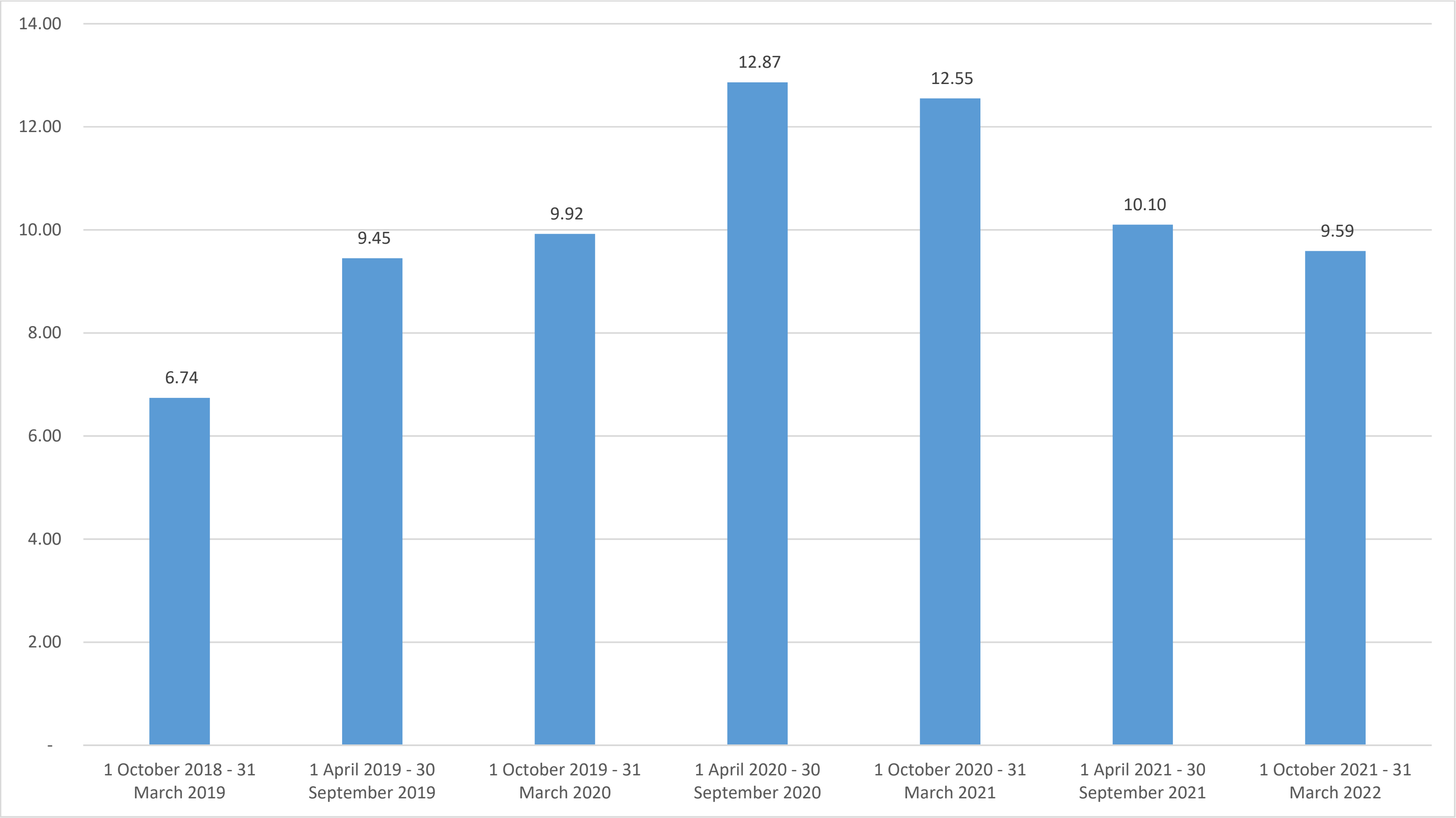


Figure 35: Average number of mobile Intra-EU SMS per month per subscriber (subscribers that used Intra-EU communications services), 1 April 2021 – 30 September 2021 and 1 October 2021 – 31 March 2022.

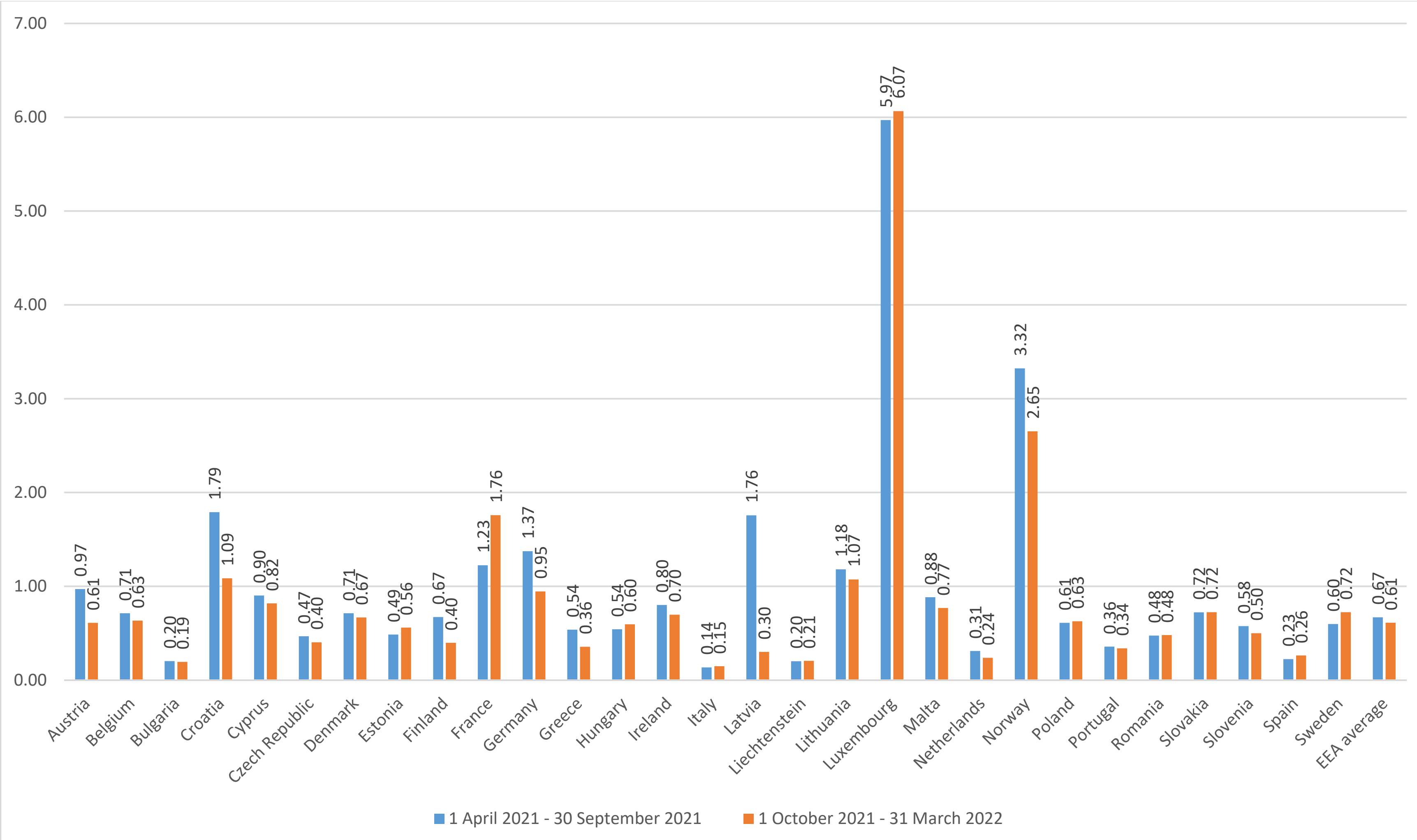
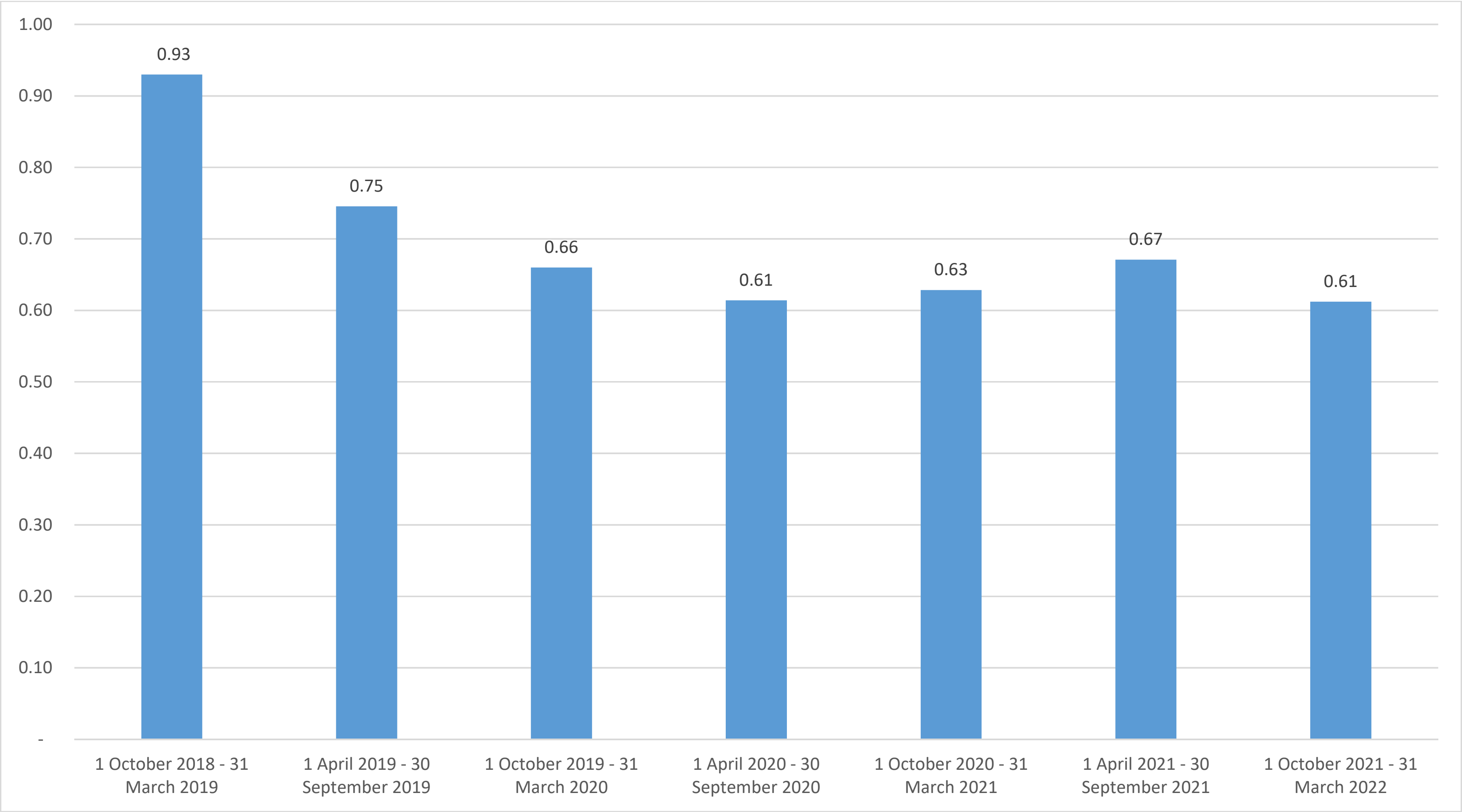


Figure 36: EEA average number of mobile Intra-EU SMS per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 - 31 March 2022.



Annex I: Methodology for the data collection

A limited number of operators have opted for not supplying the data relative to indicators in questionnaire. This is not at all unusual for a comprehensive data collection of this type. In most cases, the NRA was able to work with each company to resolve or alleviate the problem. In other cases, where system upgrades are necessary to comply with the new format of the data collection, the operator was asked to provide the best possible estimate currently available and to complete upgrades in time to provide high quality data for the next data collection. Some NRAs expressed major data quality challenges at the national operators' level as well as the use of different reporting systems by operators.

For ease of comparison, the Euro is used throughout this Report. Within the EEA, currency fluctuations between the Euro and other national currencies are likely to have affected the average prices reported for EEA countries outside the Euro zone.

All retail prices included in the charts exclude VAT. They are an average of prices paid by postpaid and prepaid tariff plan customers.

The Intra-EU communications Regulation also applies to the EEA EFTA States Norway, Iceland and Liechtenstein. For calls and SMS originating in Norway, Iceland and Liechtenstein the rules are applicable from the date they are incorporated in the EEA agreement and this Report includes indicators from Norway and Liechtenstein.

Annex II: List of respondents

Operators that provided data for the period 1 April 2021 – 31 March 2022:

Austria
A1 Telekom Austria
AGMS Austria
ASK4 Austria
Citycom Telekommunikation
Colt Technology Services Austria
Finarea
HoT Telekom
Hutchison 3G Austria
IKB Innsbrucker Kommunalbetriebe
ITNS
Kabelplus
LINZ STROM GAS WÄRME GmbH
LIWEST
LTK
Lycamobile Austria
Mass Response
MTEL
OJA.at
Onoffapp OÜ
Orange
Porsche Smart Mobility
Riepert Informationstechnologie
RTK
Russmedia
Salzburg AG
Smartspace
T-Mobile Austria
Vectone Mobile Austria
Vodafone Enterprises Austria
Voxbone

Belgium
Proximus
Telenet Group
Orange Belgium
Voo
Mobile Vikings

Bulgaria
Bulgarian Telecommunication Company (Vivacom)
Telenor Bulgaria
A1 Bulgaria
Cooolbox

Croatia
Hrvatski Telekom
A1 Hrvatska
Tele2

Cyprus
Cablenet
Cyta
Epic
Primetel

Czech Republic
Ceteris
ČEZ Prodej
Dial Telecom
MiniTel
Nej.cz
Nordic Telecom
O2 Family
O2 Czech Republic
SAZKA
Tesco Mobile ČR
T-Mobile Czech Republic
Vodafone Czech Republic

Denmark
Hi3G Denmark
TDC
Telenor
TeliaDanmark

Estonia
AS EMT
Elisa Eesti
OÜ Top Connect
TELE 2 Eesti

Finland
Ålands Telekommunikation

DNA
Elisa Corporation
Telia Finland
European Mobile Operator (MOI)

France
El Telecom
Lycamobile
Orange Caraïbe
Orange France
SFR
SRR

Germany
Telekom Deutschland GmbH
Telefónica Germany GmbH & Co. OHG
Vodafone GmbH

Greece
COSMOTE
Vodafone Panafon
Wind HellasTelecommunications
Forthnet

Hungary
Yettel Magyarország Zrt.
Magyar Telekom Nyrt.
Vodafone Magyarország Zrt.
Digi Kft.
Tarr Kft.
Invitel Zrt.
PR Telekom Zrt.
Vidanet Zrt.

Ireland
Eircom Limited
Hutchison 3G Ireland
Tesco Mobile Ireland
Vodafone Ireland

Italy
Digi Italy
ERG Mobile
Fastweb
Tre
Lycamobile
Poste Mobile
Tim
Tiscali
Vodafone
Wind

Latvia
Bite Latvia
LatvijasMobilaisTelefons
Tele2

Liechtenstein
Hoi Internet
Li-life web+it
Salt (Liechtenstein)
Speedcom
Supranet
Swisscom (Schweiz)
Telecom Liechtenstein
TV-COM
Vestra ICT
Voxphone

Lithuania
Bite Lietuva
Eurocom
Telia Lietuva
Tele2
Teledema

Luxembourg
POST
Proximus Luxembourg
Orange Communications Luxembourg

Malta
Melita Ltd
GO plc
Epic Communications Ltd

Netherlands
KPN
Lebara
Lycamobile Distribution
Tele2 Netherlands
T-Mobile Netherlands
Vodafone Libertel

Norway
Ice

Lycamobile
Telenor
Telia Norge

Poland
Lycamobile
Multimedia Polska
Netia
Orange Polska
P4
Polkomtel
T-Mobile Polska
Telego
Telestrada
Vectra
Virgin Mobile
UPC Polska

Portugal
NOS Comunicações, S.A
MEO – Serviços de Comunicações e Multimédia,S.A.
Vodafone Portugal – Comunicações Pessoais.S.A.
NOWO Communications, S.A
NOS Açores Comunicações, S.A.
NOS Madeira Comunicações, S.A.
Lycamobile Portugal, Lda

Romania
Nextgen Communications
Orange Romania
RCS&RDS
Vodafone Romania
Orange Romania Communications
Telekom Romania Mobile Communications

Slovak Republic
O2 Slovakia
Orange Slovensko
Slovak Telekom
SWAN Mobile

Slovenia
TELEKOM SLOVENIJE, D.D.
A1 Slovenija d.d.
TELEMACH D.O.O.
T-2 d.o.o.
IZI mobil, d.d.
HOT mobil, telekomunikacije in storitve d.o.o.
Mega M d.o.o.
SoftNET d.o.o.

Spain
Digi Spain Telecom, S.L.
Euskaltel, S.A.
Orange Espagne, S.A. Unipersonal
Orange España Virtual, S.L.U.
Pepemobile, S.L.
R Cable y Telecable Telecomunicaciones, S.A.U.
Telefónica de España, S.A.U.
Telefónica Móviles de España, S.A. Unipersonal
Vodafone Enabler España, S.L.
Vodafone España, S.A. Unipersonal
Vodafone ONO, S.A.U.
Xfera Móviles, S.A. Unipersonal

Sweden
Hi3G Access
Telenor Sverige
Telia Company
Tele2 Sverige