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SOLUTIONS

Competitive Intelligence Tracker 3.0 Telco

SAMPLE MARKET OVERVIEW

FOR TYPICAL NATIONAL EU MARKET

Contents:

- Device hardware changes
- Device offers
- Tariffs
  - Mobile voice tariffs
  - Mobile data tariffs
  - Fixed voice tariffs
  - Fixed data tariffs
- Add-ons
- Promotions
- Bundles

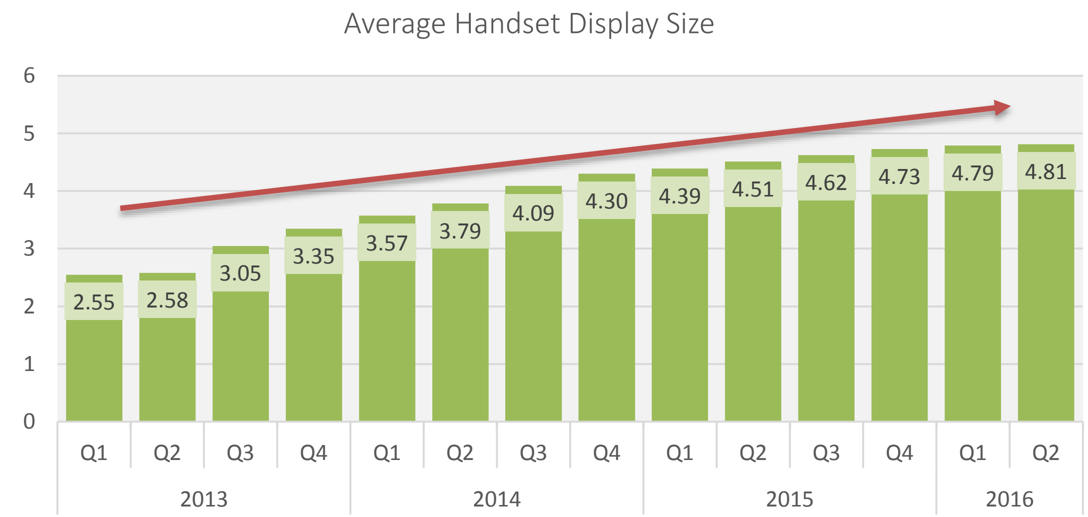
Contents:

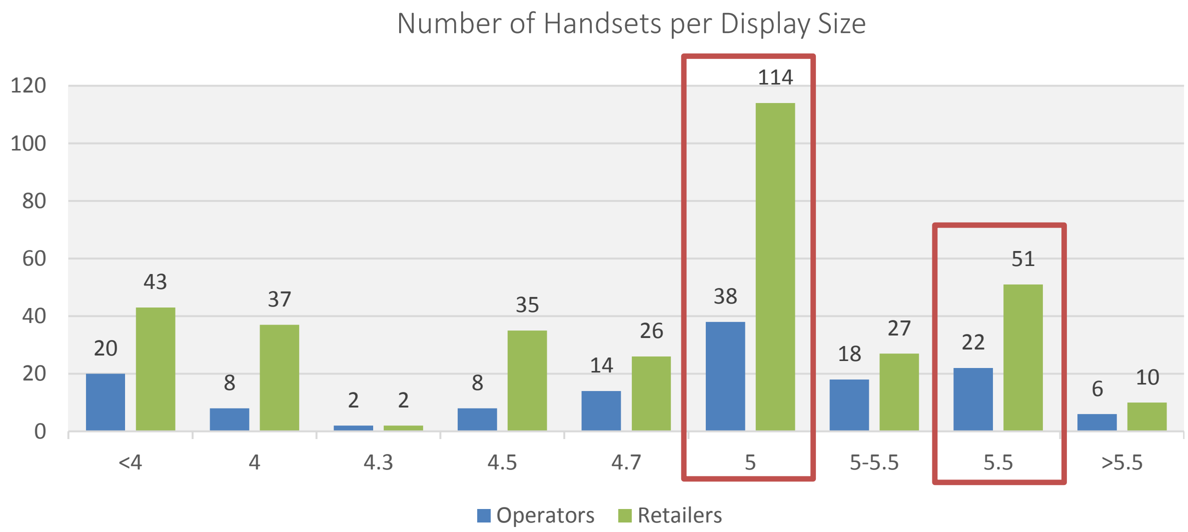
CIT REPORT: DEVICE HARDWARE CHANGES

HANDSETS HAVE BECOME MUCH LARGER

HANDSETS HAVE BECOME MUCH LARGER

- Handset display size has almost doubled in last 3 years, having 5” and 5.5” screen sizes dominant in 2017.



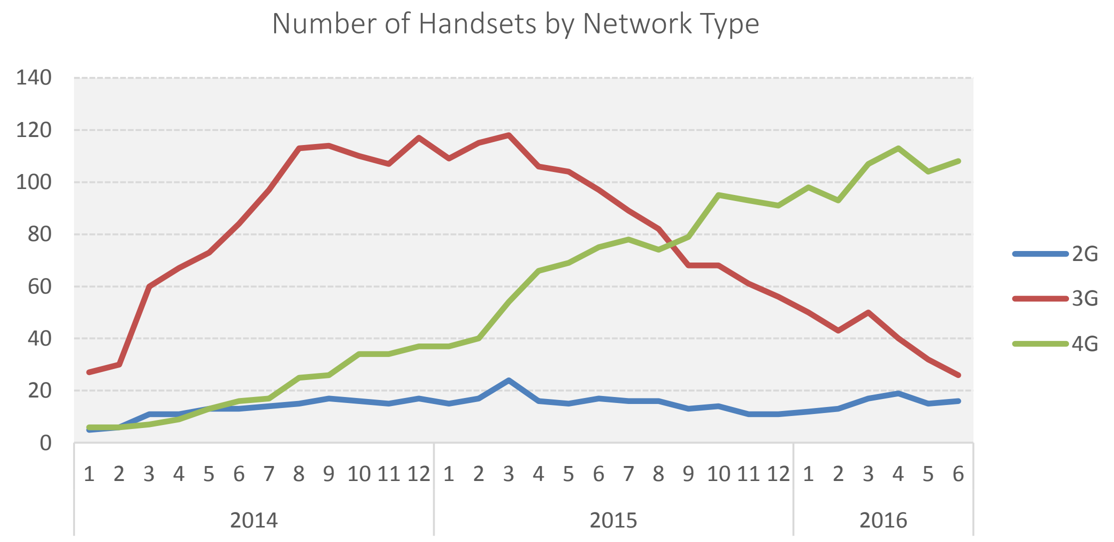


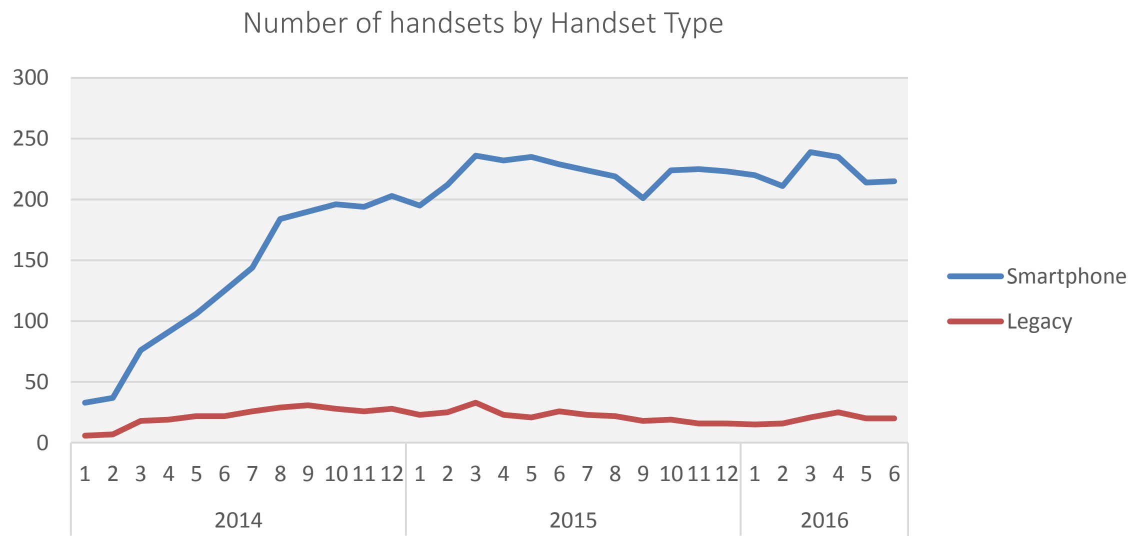
CIT REPORT: DEVICE HARDWARE CHANGES

LEGACY HANDSETS ARE STILL IN THE GAME AND 4G DEVICES ARE BECOMING DOMINANT

LEGACY HANDSETS ARE STILL IN THE GAME AND 4G DEVICES ARE BECOMING DOMINANT

- **4G has become de-facto standard** for new handsets purchases
- **Legacy handsets are still in the game** having >10 offers in last several years





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Contents:

CIT Report: Device offers

DEVICE PORTFOLIO SIZE HAS INCREASED IN 2017

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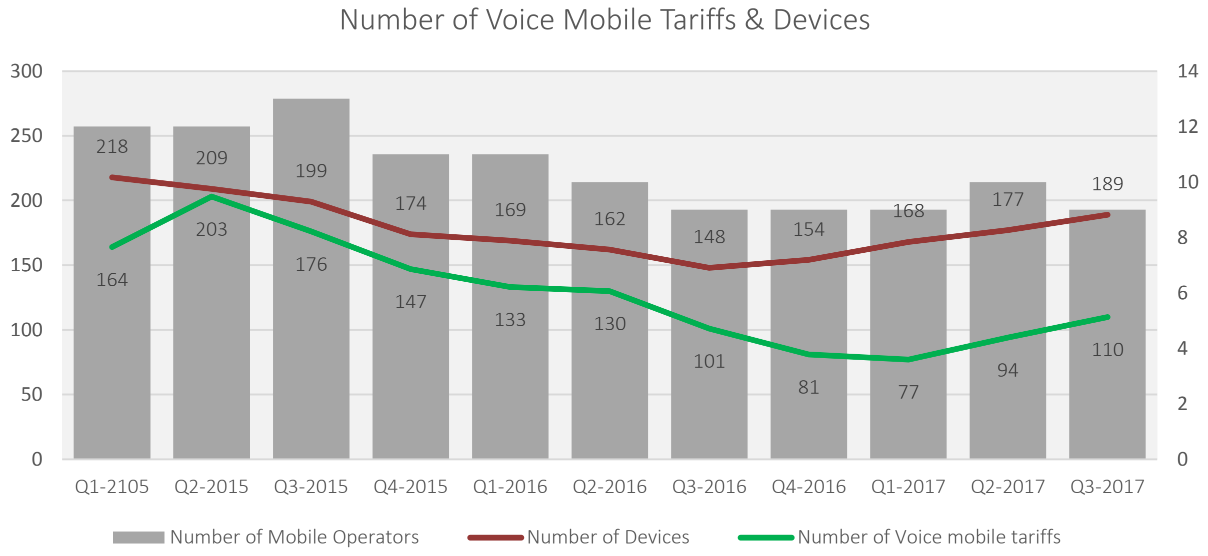
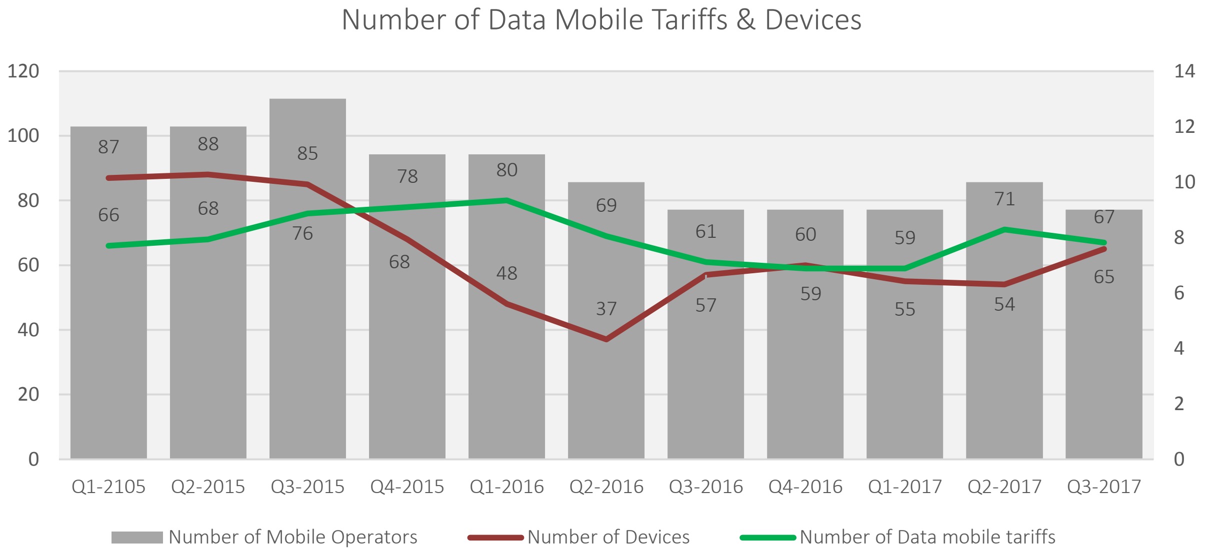
- Although there is fewer mobile operators on local market, absolute **number of offered devices** and tariffs **has increased** in 2017.



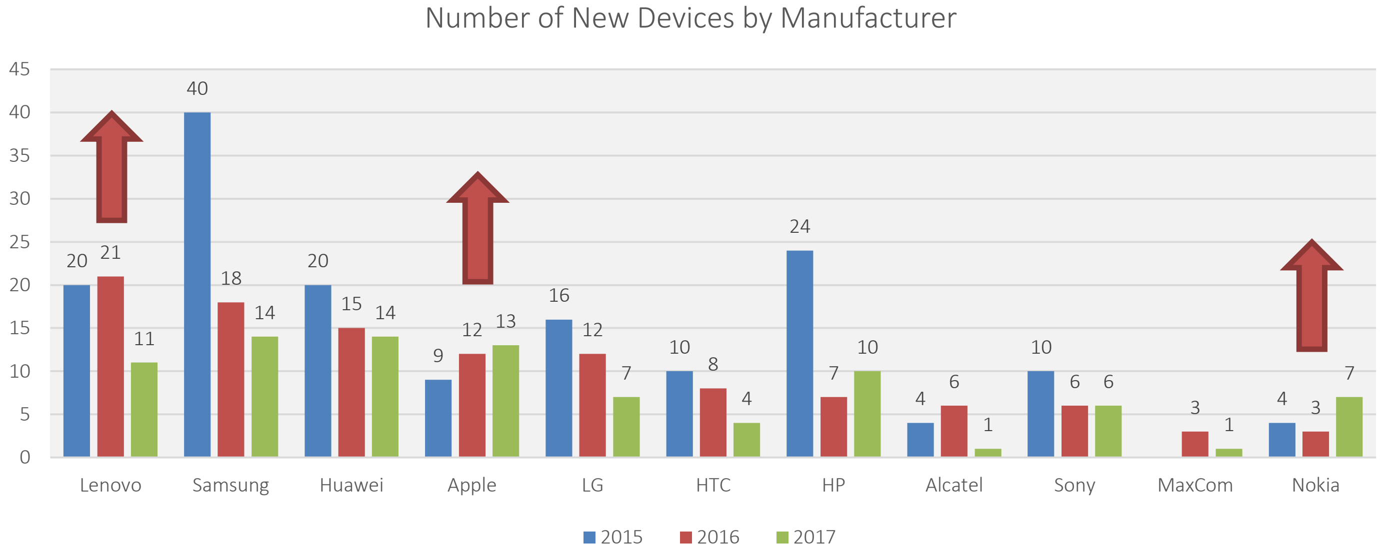


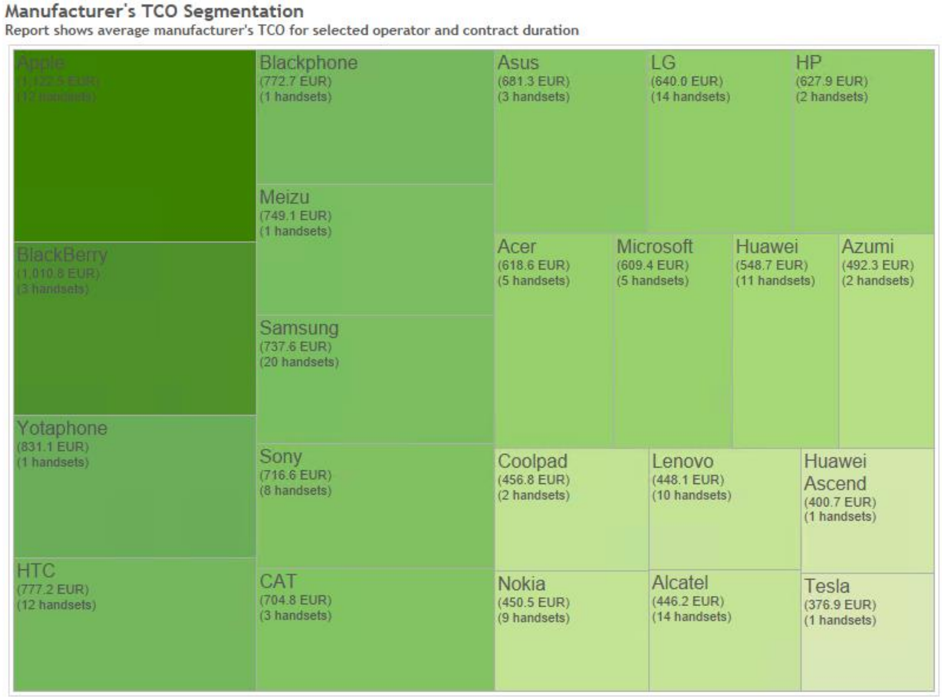
CIT REPORT: DEVICE OFFERS

HANDSET PORTFOLIO IN OPERATOR'S OFFER HAS SIGNIFIANTLY CHANGED IN LAST 2 YEARS

HANDSET PORTFOLIO IN OPERATOR'S OFFER HAS SIGNIFIANTLY CHANGED IN LAST 2 YEARS

- **Lenovo, Apple and Nokia** have **gained popularity** in operator's offers in 2016, while **other** manufacturers have significantly **smaller** portfolio, especially Samsung.
- While **Apple** is still **most expensive** brand, and Blackberry traditionally in premium segment, **several small players** like YotaPhone, Blackphone and Meizu have **positioned** themselves **in premium segment**.
- Samsung's, Sony's and HTC's devices are positioned around 700 EUR of average TCO.



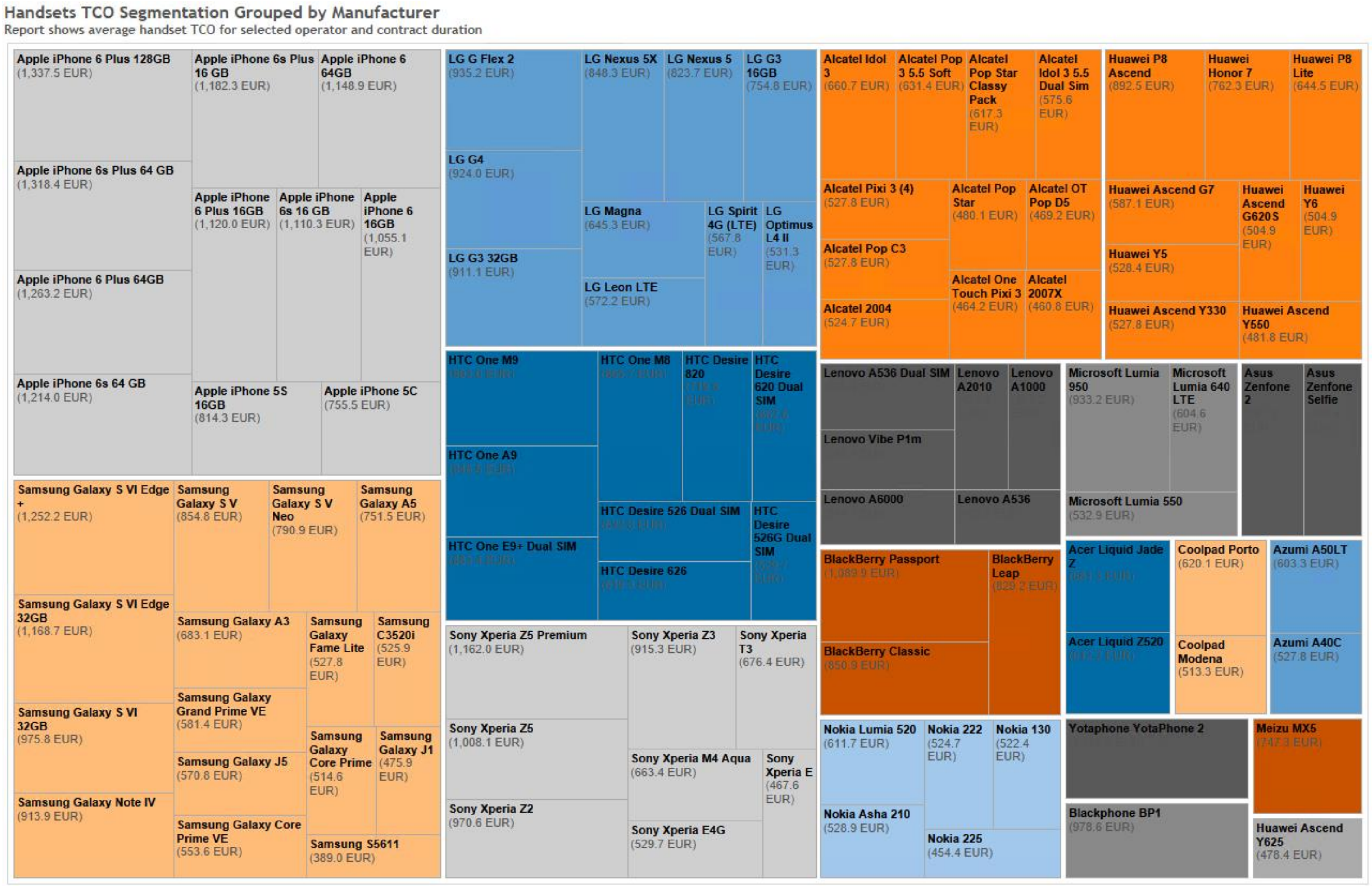


CIT REPORT: DEVICE OFFERS

APPLE IS LEADER IN PREMIUM SEGMENT AND 5 KEY PLAYERS ARE HOLDING MORE THAN HALF OF TCO SHARE

APPLE IS LEADER IN PREMIUM SEGMENT AND 5 KEY PLAYERS ARE HOLDING MORE THAN HALF OF TCO SHARE

- **Apple, Samsung, LG, HTC and Sony** still hold **more than a half of TCO share** in 2017 and have the most handsets per brand.
- **Apple has completely dominated premium segment** with all devices having higher than 700 EUR TCO while **other** manufacturers have **diversified** their **portfolio** around range from 400 to 1000 EUR.

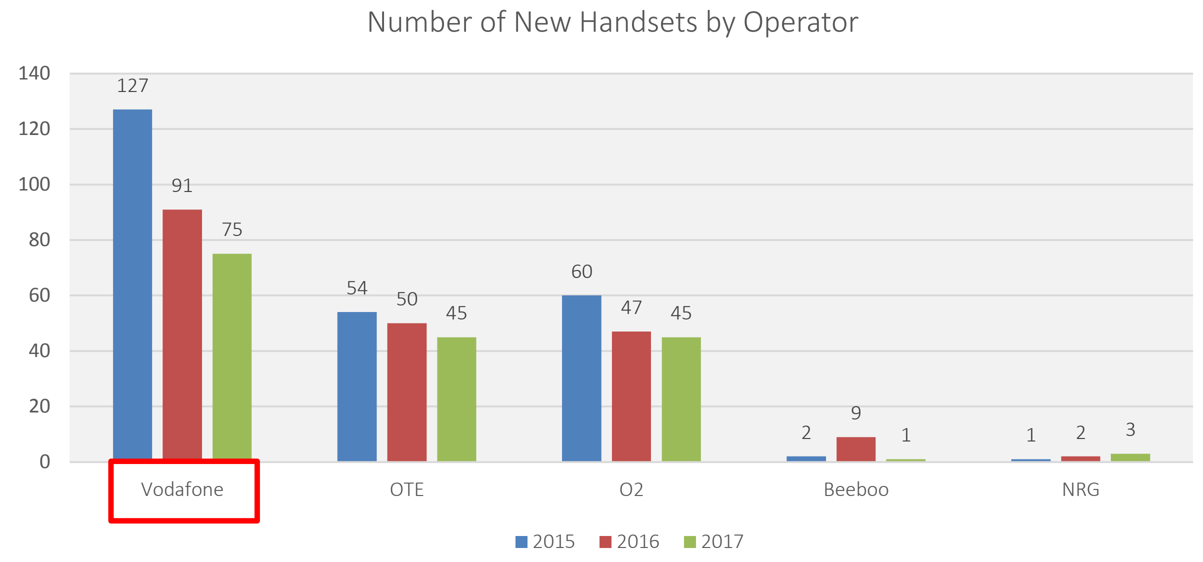


CIT REPORT: DEVICE OFFERS

VODAFONE IS THE LEADER IN NEW HANDSET INTRODUCTION

VODAFONE IS THE LEADER IN NEW HANDSET INTRODUCTION

- While **all operators** have **shrunk** their **handset portfolio** since 2015, **Vodafone is** still absolute **leader** in introduction of new handsets.
- Both MVNO operators have focused only on several necessary handsets with prepaid offers.



CIT REPORT: DEVICE OFFERS

VODAFONE HAS THE MOST EXPENSIVE HANDSET OFFERS ON MARKET

VODAFONE HAS THE MOST EXPENSIVE HANDSET OFFERS ON MARKET

- **Vodafone** has the **most expensive** offers on market.
- **O2** has offers that are ranked **between** competing operators.
- **OTE** has the **least expensive** handset offers on market and therefore the highest sales potential.

Price Attractiveness Dashboard

Report compares handset prices (TCO) between related residential tariffs of all operators and shows number of handsets where operator has low between. (this demo sample is limited only to several tariffs from residential segment)

Vodafone vs Others

Combination Name	Tariffs Vodafone	Tariffs O2	Tariffs OTE	least expensive	between	most expensive
MF Range 500-895	V-Family 12	Revolution Junior	T-Net Surf K1	1		36
MF Range 1000-1400-1	Free XI	Revolution X	Net Surf K2	4	4	29
MF Range 1000-1440-2	Free M	Generator	Unlimited II v.	2	3	32
MF Range 1400-1600	Orange XL	Revolution 222	Unlimited II v.	5	2	30
MF Range 1500-1700	Orange L	Firends M	Brian Voice M	12	1	24
MF Range 1600-1700	T-Net Surf K1	Friends S	Brian Voice M	10	2	25
MF Range 2000-2100	Net Surf K2	Roaming Safe 1	Friends S	10	4	25
MF Range 2600-2700	Unlimited II v.1.	Meolody S	Roaming Safe	16	1	22
MF Range 3600-3700	Unlimited II v.2.	Senior Home & Da	Meolody S	17		22
MF Range 5600-7000	Brian Voice M	Descent	Senior Home			39
MF Range 5700-7000	Brian Voice M with	Orange Junior	Descent	11	7	21

O2 vs Others

Combination Name	Tariffs O2	Tariffs Vodafone	Tariffs OTE	least expensive	between	most expensive
MF Range 500-895	Revolution Junior	T-Net Surf K1	V-Family 12	10	11	4
MF Range 1000-1400-1	Revolution X	Net Surf K2	Free XI	8	6	11
MF Range 1000-1440-2	Generator	Unlimited II v.	Free M	10	7	8
MF Range 1400-1600	Revolution 222	Unlimited II v.	Orange XL	18	5	2
MF Range 1500-1700	Firends M	Brian Voice M	Orange L	10	3	12
MF Range 1600-1700	Friends S	Brian Voice M	T-Net Surf K1	11	3	11
MF Range 2000-2100	Roaming Safe 1	Friends S	Net Surf K2	16	9	10
MF Range 2600-2700	Meolody S	Roaming Safe	Unlimited II v.1.	5	13	17
MF Range 3600-3700	Senior Home & Data	Meolody S	Unlimited II v.2.	13	13	9
MF Range 5600-7000	Descent	Senior Home	Brian Voice M	25	8	2
MF Range 5700-7000	Orange Junior	Descent	Brian Voice M with	2	10	23

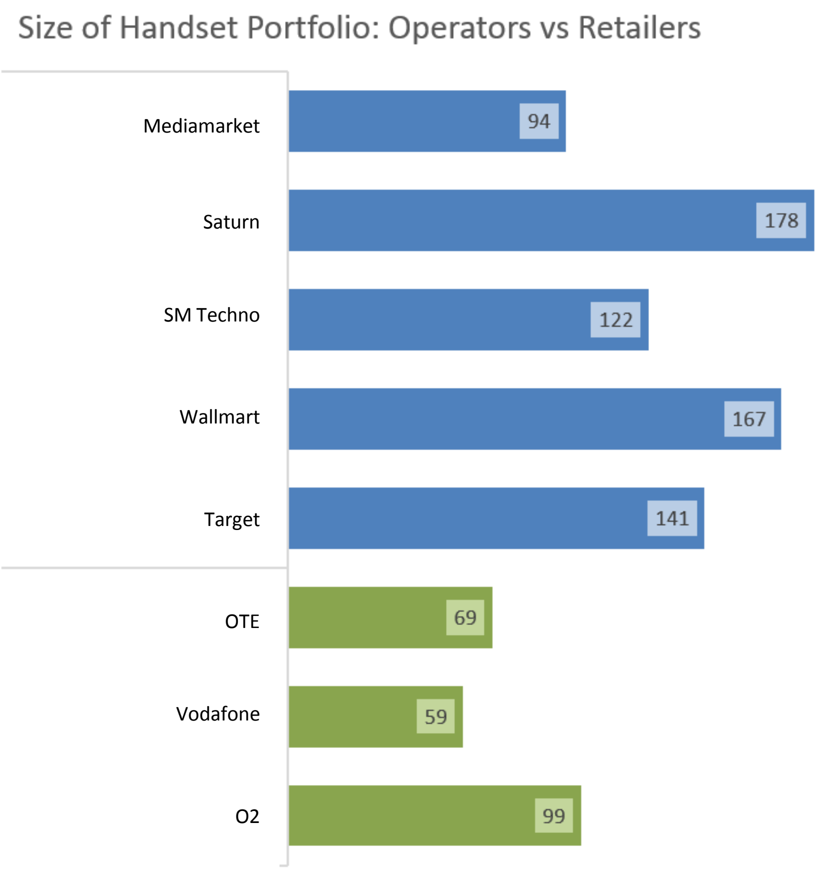
OTE vs Others

Combination Name	Tariffs OTE	Tariffs O2	Tariffs Vodafone	least expensive	between	most expensive
MF Range 500-895	T-Net Surf K1	V-Family 12	Revolution Junior	29		
MF Range 1000-1400	Net Surf K2	Free XI	Revolution X	28	1	
MF Range 1000-1440	Unlimited II v.	Free M	Generator	28	1	
MF Range 1400-1600	Unlimited II v.	Orange XL	Revolution 222	17	4	8
MF Range 1500-1700	Brian Voice M	Orange L	Firends M	18	7	4
MF Range 1600-1700	Brian Voice M	T-Net Surf K1	Friends S	19	6	4
MF Range 2000-2100	Friends S	Net Surf K2	Roaming Safe 1	18	4	9
MF Range 2600-2700	Roaming Safe	Unlimited II v.1.	Meolody S	23	3	5
MF Range 3600-3700	Meolody S	Unlimited II v.2.	Senior Home & Da	14	4	13
MF Range 5600-7000	Senior Home	Brian Voice M	Descent	19	9	3
MF Range 5700-7000	Descent	Brian Voice M w	Orange Junior	31		

CIT REPORT: DEVICE OFFERS

RETAILERS HAVE SIGNIFICANTLY LARGER HANDSET PORTFOLIO THAN OPERATORS

RETAILERS HAVE SIGNIFICANTLY LARGER HANDSET PORTFOLIO THAN OPERATORS



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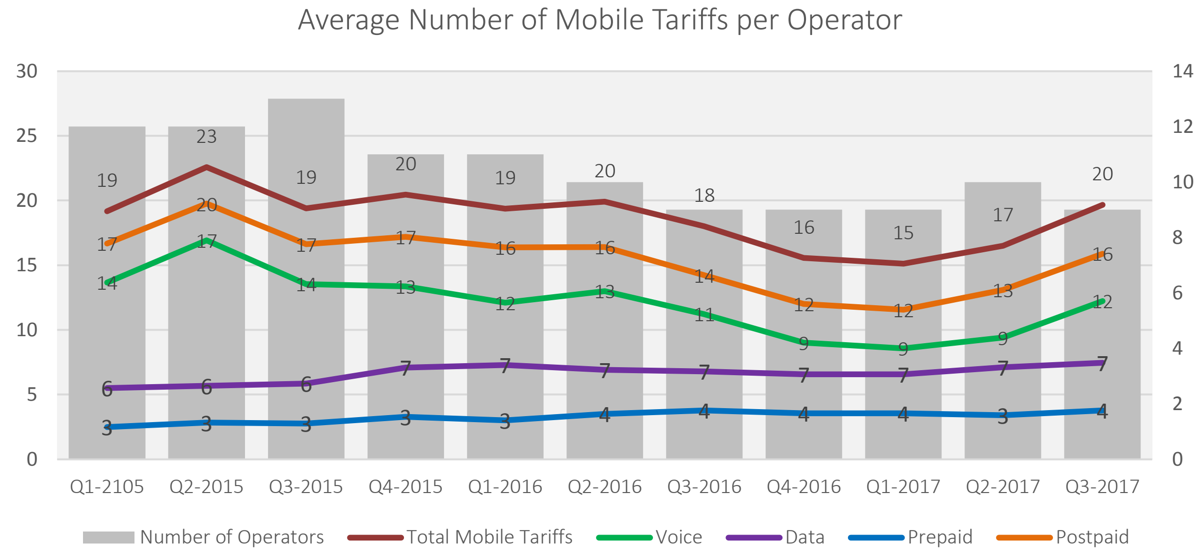
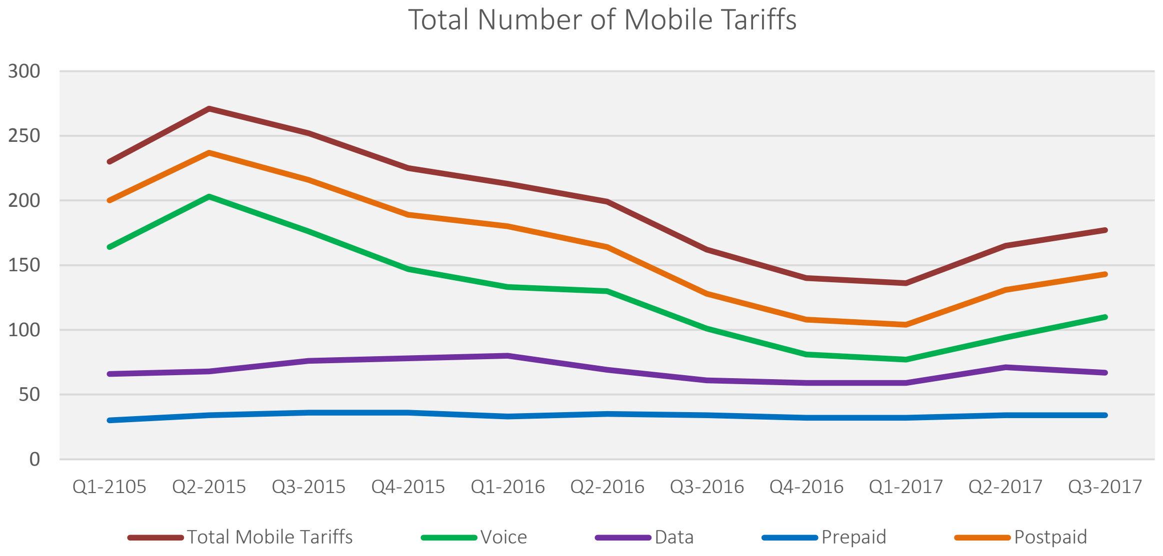
CIT REPORT: MOBILE VOICE TARIFFS

RESURRECITON OF MOBILE TARIFFS PORTFOLIO

RESURRECITON OF MOBILE TARIFFS PORTFOLIO

- Although several operators have disappeared from market, trend of **shrinkage of portfolio size of prepaid and postpaid mobile tariffs** in 2016 **has been reversed in 2017** having almost the same number of tariffs like in 2015.
- **Majority of changes** happened to **postpaid voice tariffs** while prepaid and data tariffs were almost unchanged.



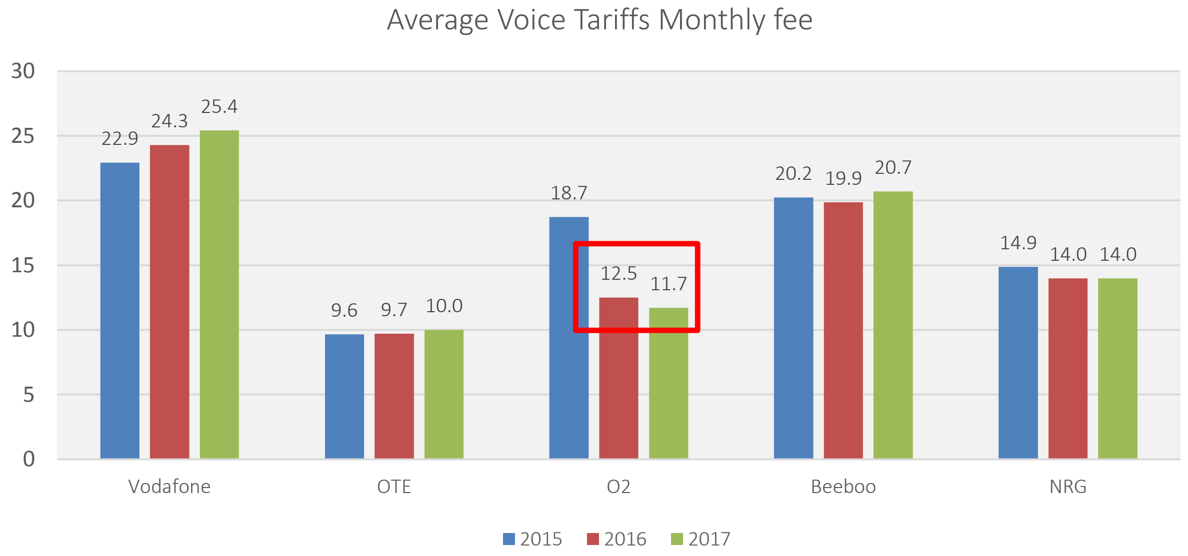


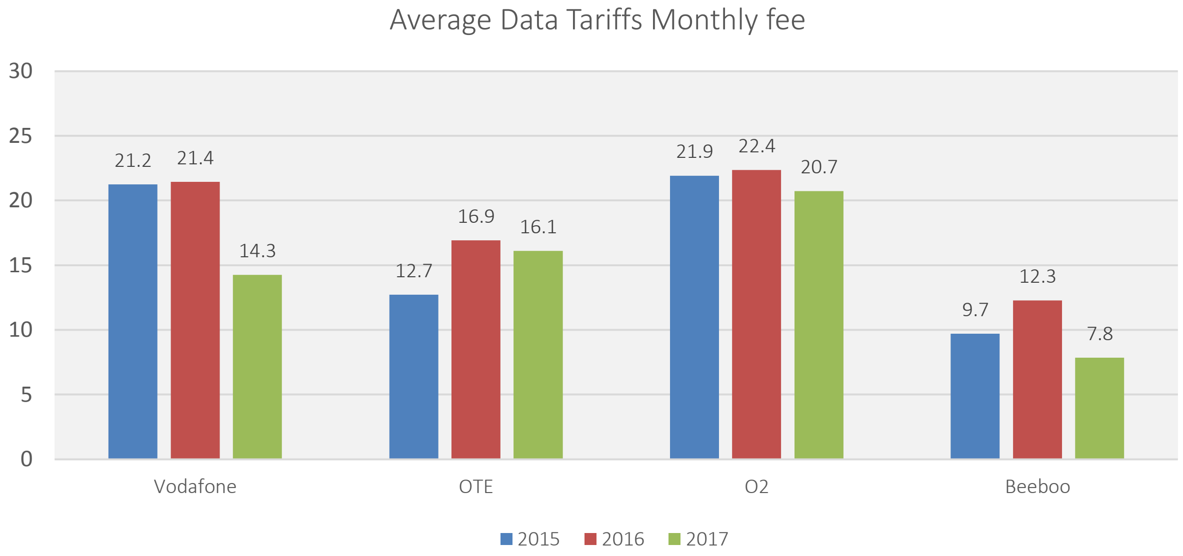
CIT REPORT: MOBILE VOICE TARIFFS

VOICE TARIFF MONTHLY FEES HAVE INCREASED PRICES WHILE DATA TARIFFS HAVE BECOME CHEAPER

VOICE TARIFF MONTHLY FEES HAVE INCREASED PRICES WHILE DATA TARIFFS HAVE BECOME CHEAPER

- Most operators have **slowly increased average voice tariffs monthly fees** in last couple of years, **except O2** which had price aggressive strategy.
- After trend of **increasing monthly fees** in **data tariffs** in **2016**, they have been **significantly lowered in 2017**.





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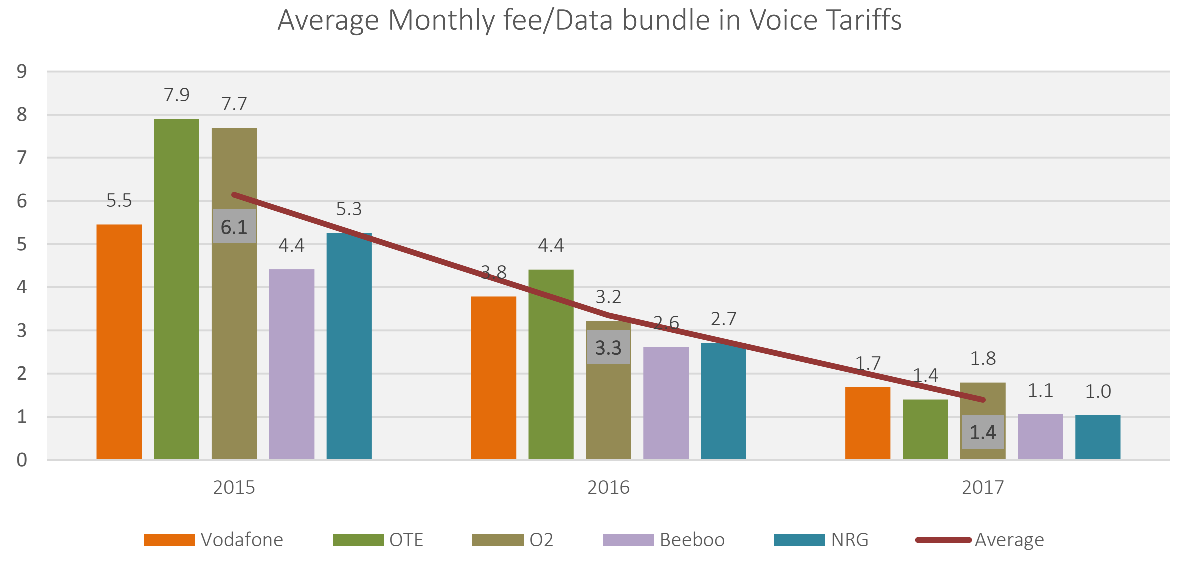
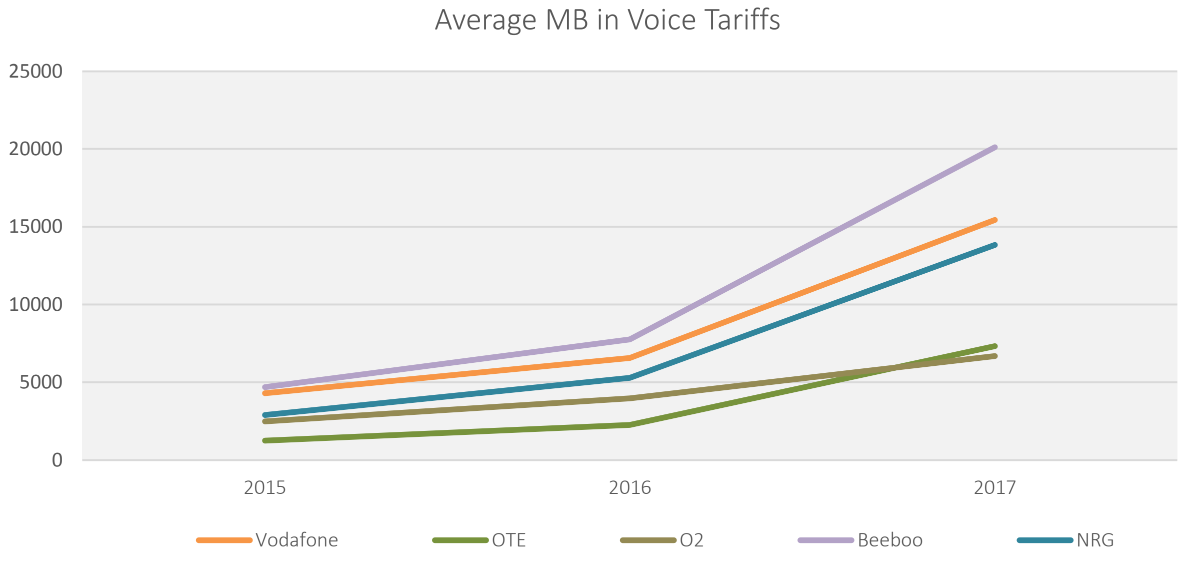
CIT REPORT: MOBILE VOICE TARIFFS

LOWER DATA PRICES AND LARGER BUNDLES

DATA BUNDLES AND TRAFFIC HAS BECOME MORE AFFORDABLE

- Data traffic has become **drastically cheaper** in both 2016 and 2017.
- All operators have **increased data bundles** almost **4 times** in last 2 years.



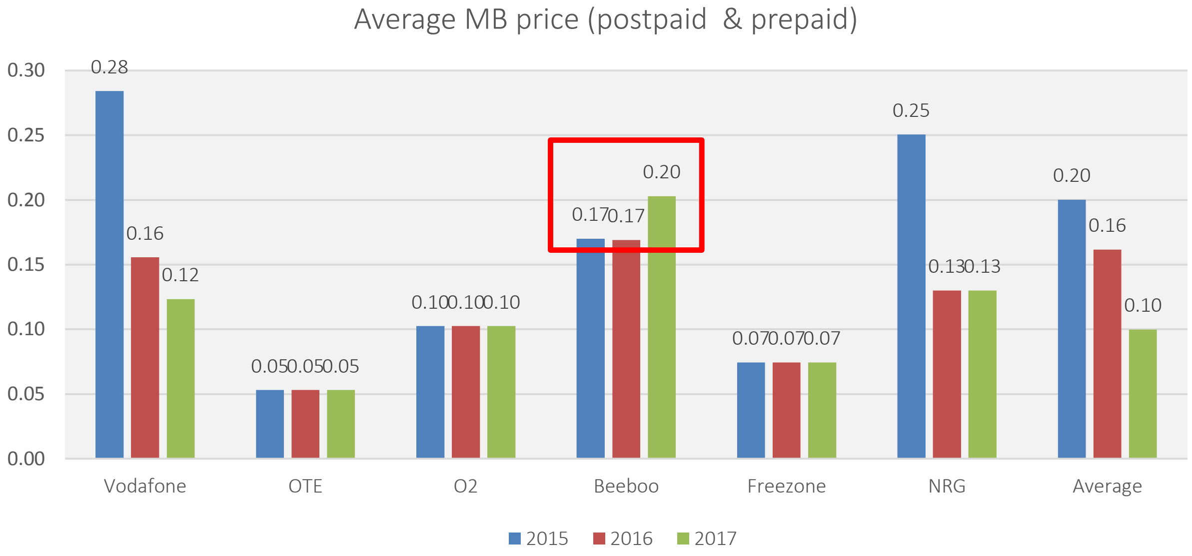


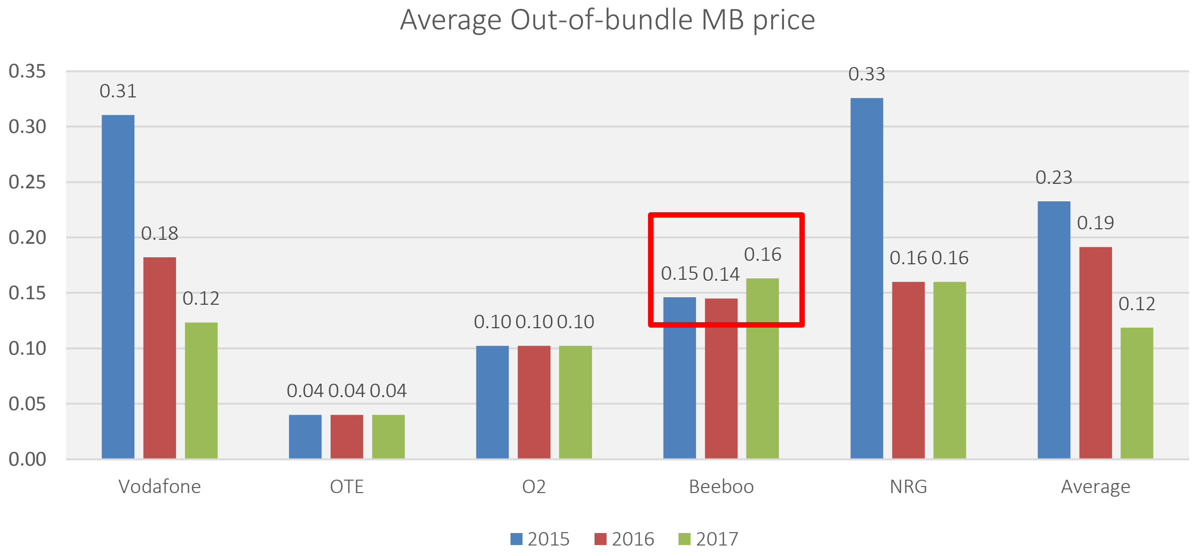
CIT REPORT: MOBILE VOICE TARIFFS

DATA BUNDLES AND TRAFFIC HAS BECOME MORE AFFORDABLE

DATA BUNDLES AND TRAFFIC HAS BECOME MORE AFFORDABLE

- While almost **all operators** have **lowered bundled MB prices**, only Beeboo raised already high prices.
- Out of bundle data prices have been lowered by all operators except Beeboo.





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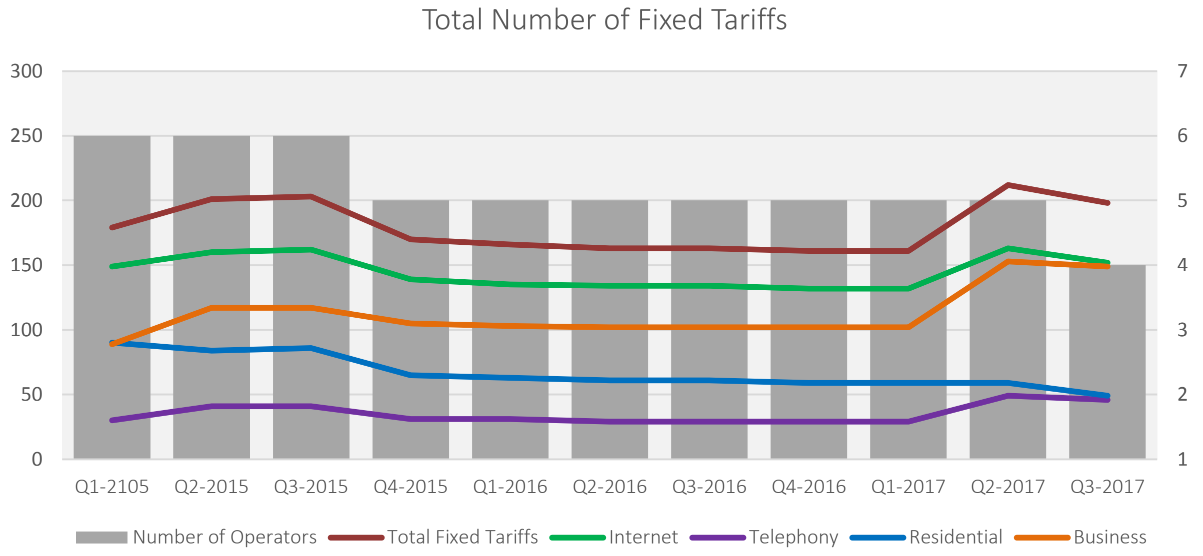
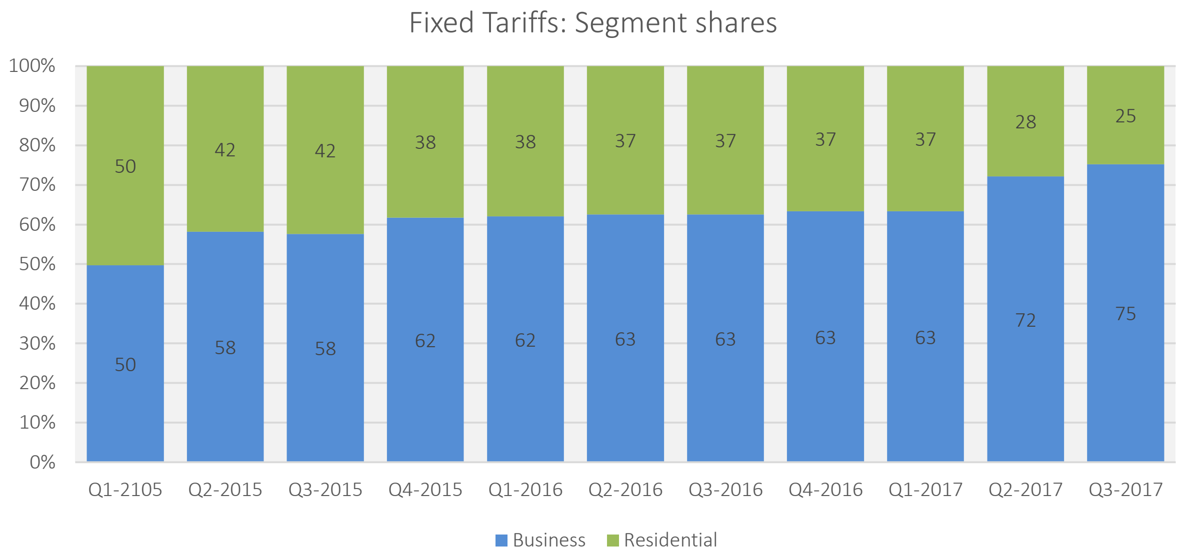
CIT REPORT: FIXED TARIFFS

FIXED TARIFFS HAVE BECOME MOSTLY TAILORED FOR BUSINESS USERS

FIXED TARIFFS HAVE BECOME MOSTLY TAILORED FOR BUSINESS USERS

- Fixed tariffs had slight decline in numbers in 2016.
- **Business fixed tariffs** have gained significant share over past two years consisting of **>70% of all fixed tariffs** on market.



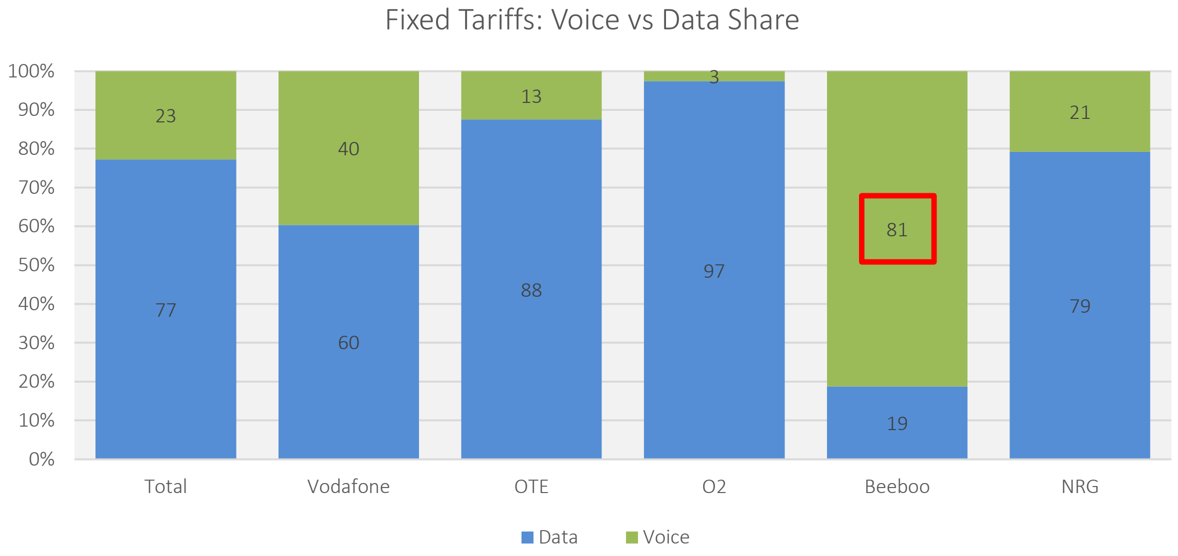


CIT REPORT: FIXED TARIFFS

DATA TARIFFS ARE DOMINATING FIXED TARIFFS MARKET

DATA TARIFFS ARE DOMINATING FIXED TARIFFS MARKET

- **Data fixed tariffs** make over 3/4 of **total fixed tariffs** on market.
- While almost **all operators** have **very high share of data fixed tariffs**, only Beeboo has higher share of voice fixed tariffs.



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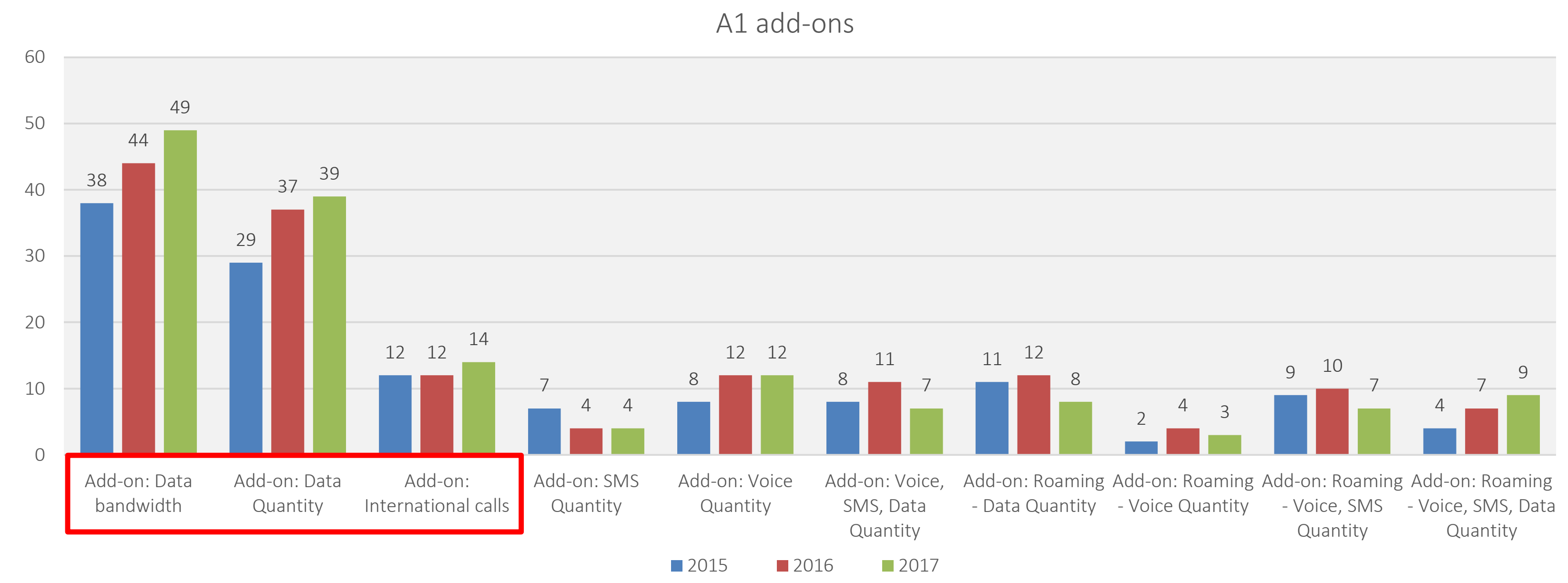
CIT REPORT: ADD-ONS

A1 HAS EXTENDED PORTFOLIO OF DATA ADD-ON SERVICES

A1 HAS EXTENDED PORTFOLIO OF DATA ADD-ON SERVICES

- **A1** has focused it's additional services portfolio around data services, **primary** offering **additional bandwidth and megabytes**, according to general telco trends in EU.
- **Classical additional services** like Voice and SMS are in **decline** (mostly due flat-rate bundling) while international calls add-ons portfolio has been extended in Y2017.



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CIT REPORT: PROMOTIONS

NUMBER OF PROMOTIONS HAS ALMOST DOUBLED IN LAST 2 YEARS

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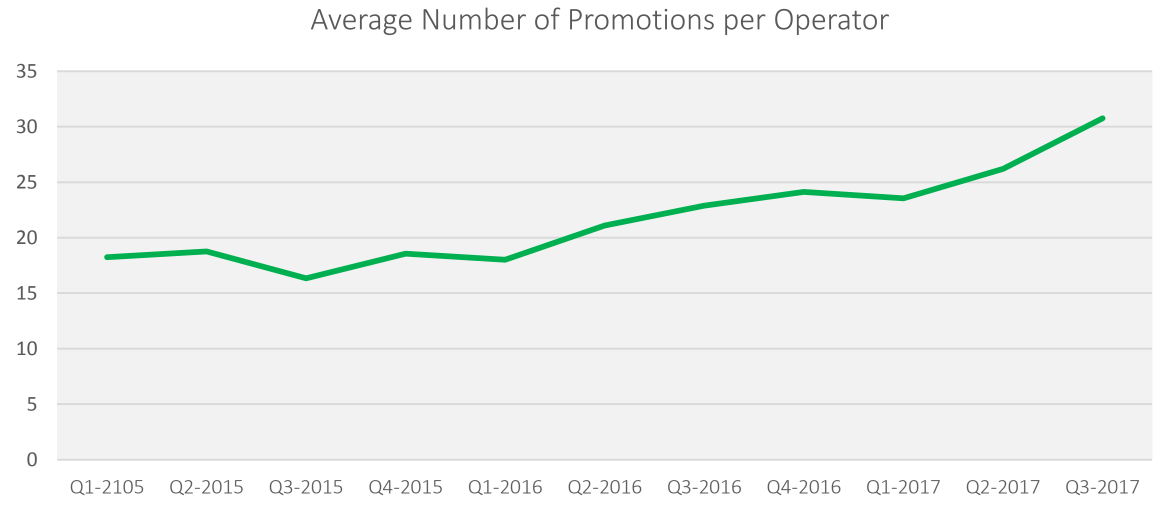
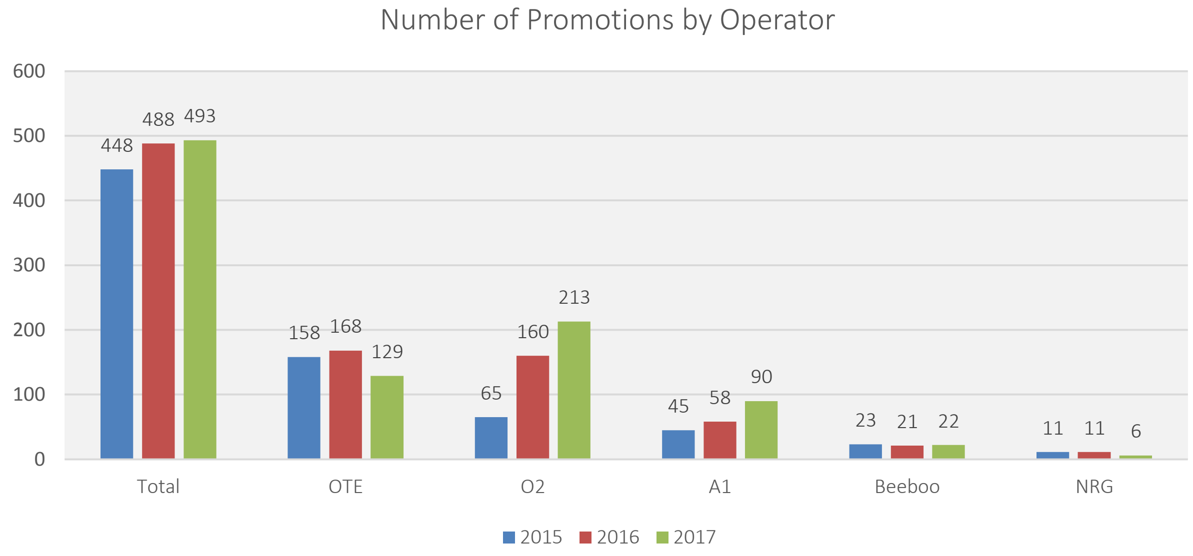
- O2 and A1 have been especially active in promotion activities in last 2 years.



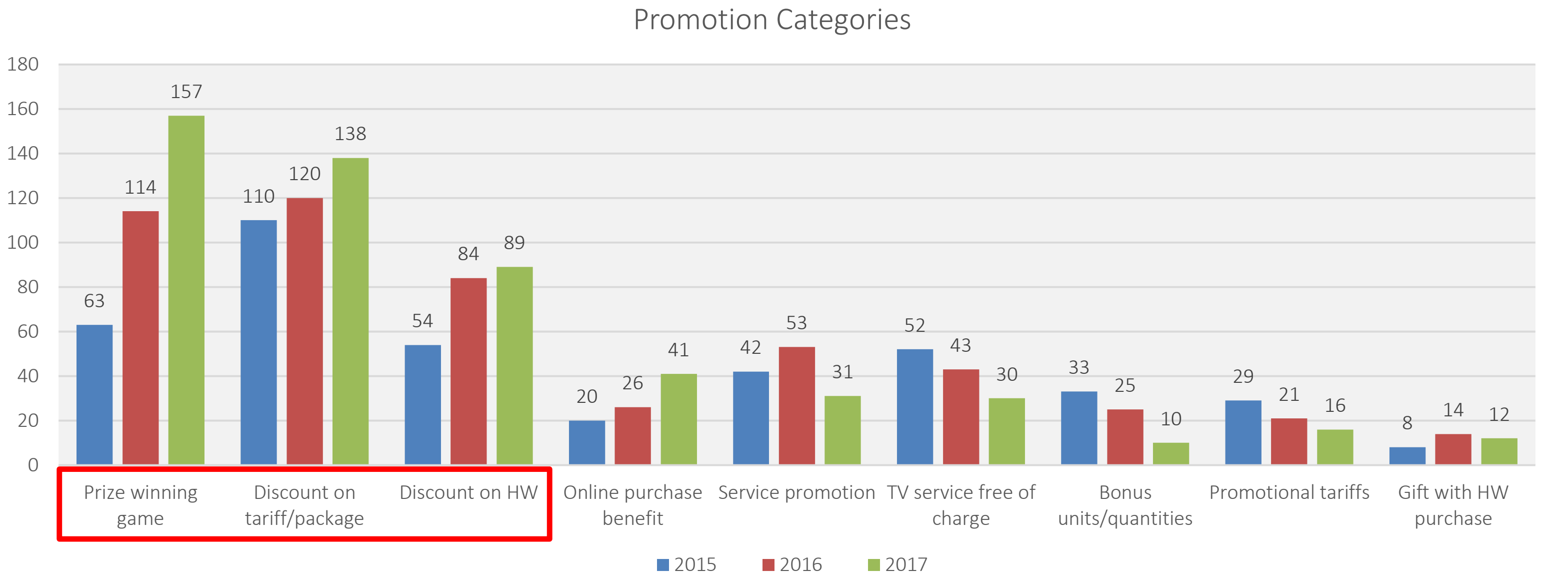


CIT REPORT: PROMOTIONS

PRIZE WINNING GAMES AND DISCOUNTS ARE MOSTLY USED PROMOTION 'TOOLS'

PRIZE WINNING GAMES AND DISCOUNTS ARE MOSTLY USED PROMOTION 'TOOLS'

- **Prize winning game** offers have almost **doubled since 2015** making them default choice for attracting customers.
- **Discounts on tariffs and hardware** are second most used tool in attracting customers.



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CIT REPORT: BUNDLES

FIXED SERVICES ARE DOMINATING BUNDLES MARKET

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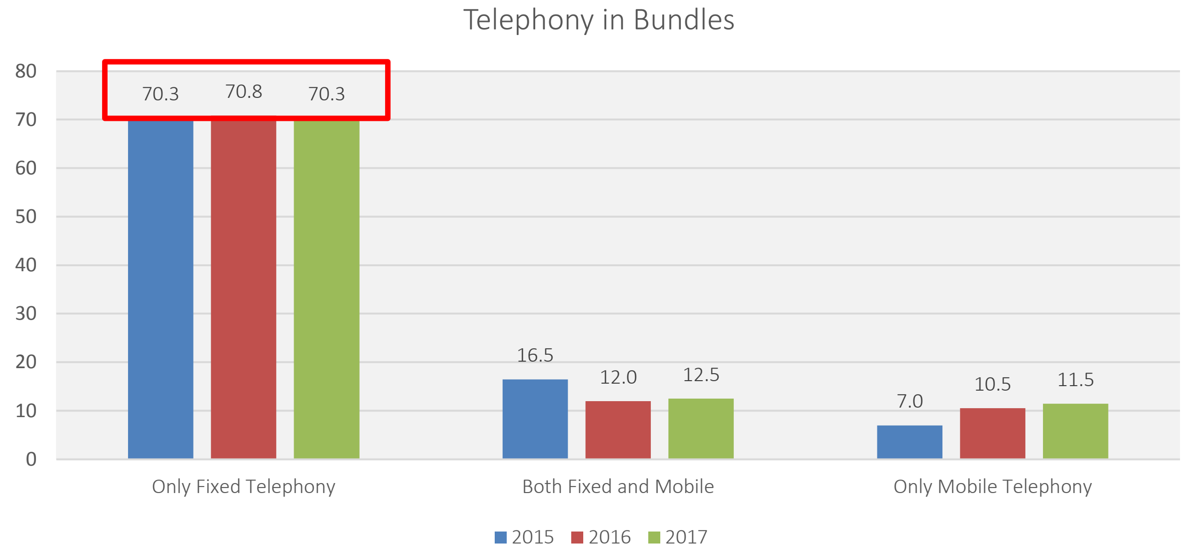
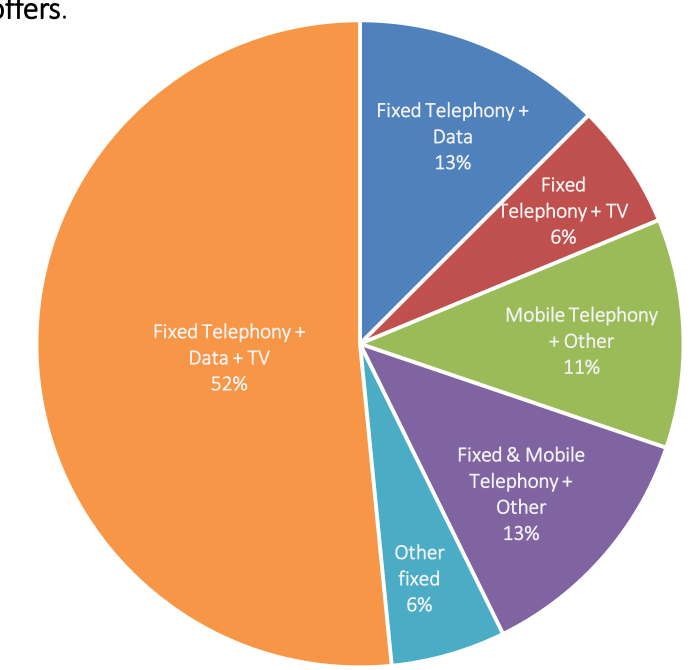
- Although it is a trend to bundle mobile and fixed services, **great majority** of bundles includes **fixed telephony only**.
- Out of all fixed bundle combinations, **fixed telephony + Data + TV** bundles consist of **more than half of market offers**.





CIT REPORT: BUNDLES

FIXED SERVICES ARE DOMINATING BUNDLES MARKET

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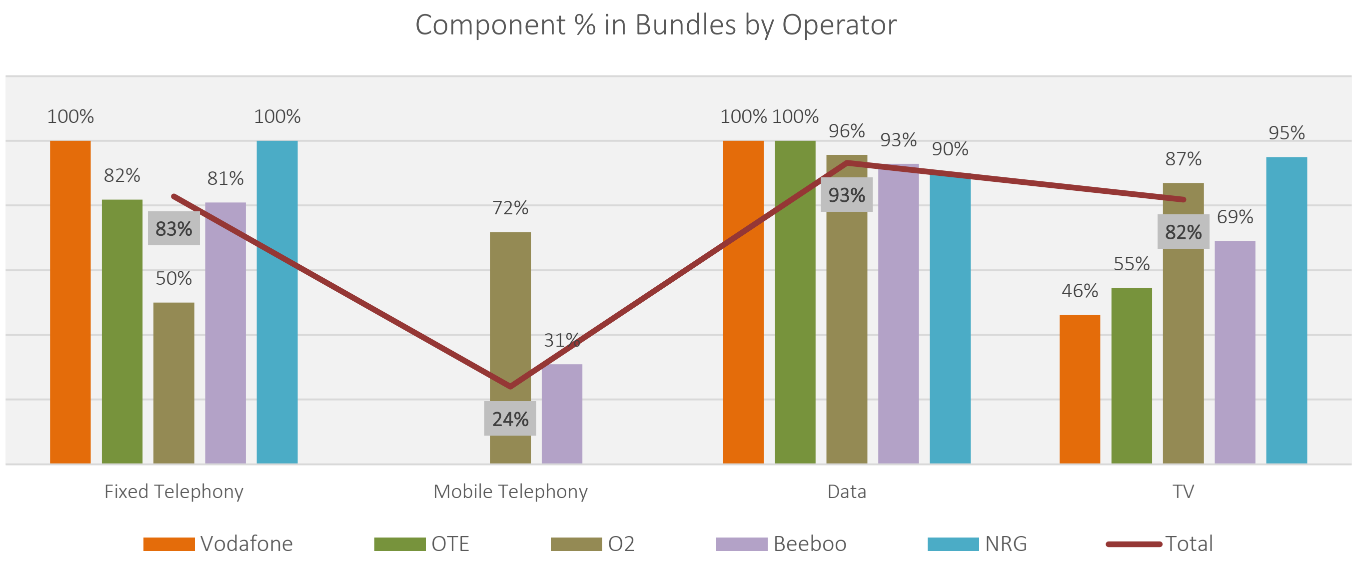
- **Almost all** operators offer **fixed telephony with data bundles** and **majority** if offering **TV services** as well.
- Unexpectedly, mobile telephony is in majority of cases not bundled.



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THANK YOU

DON'T HESITATE TO CONTACT US

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