

# **Intra-EU communications BEREC Benchmark Report April 2019 – March 2020**

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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 1<sup>st</sup> 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 2019 – 31 March 2020, split by two periods: 1 April 2019 to 30 September 2019 and 1 October 2019 to 31 March 2020 (corresponding to the 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> quarters of 2019 and the 1<sup>st</sup> quarter of 2020). 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,<sup>1</sup> 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:

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<sup>1</sup> 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, a 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 27 March 2020. 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<sup>2</sup> 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.

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<sup>2</sup> 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 180 providers of international communications provided information for this Report. This number includes virtually<sup>3</sup> 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 substantially the international communication market. The average international communication subscriber spent 32.44 minutes per month from fixed phone in Q4 2018 and Q1 2019, while 26.05 minutes per month were spent in Q2 and Q3 2019 and 35.77 minutes per month in Q4 2019 and Q1 2020 (Figure 17). The average number of mobile calls originated in Q4 2018 and Q1 2019 amounted to 6.74 minutes per month, while in Q2 and Q3 2019 reached 9.45 minutes per month and 9.92 minutes in Q3 2019 and Q1 2020 (Figure 18). On average 0.93 SMS were sent per month per Intra-EU subscriber in Q4 2018 and Q1 2019, while 0.75 SMS per month were sent in Q2 and Q3 2019 and 0.66 SMS per month in Q3 2019 and Q1 2020 (Figure 19).

### 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 8.65% of fixed networks subscribers in Q2 and Q3 2019 used international communication services with regulated price and 7.91% in Q4 2019 and Q1 2020 (Figure 1). Fixed alternative tariff plans including regulated international communication were not so popular – only 0.54 % of total fixed subscribers used alternative tariffs in Q2 and Q3 2019 and 0.36 % in Q4 2019 and Q1 2020 (Figure 3).

In the case of mobile networks, subscribers were more active using regulated tariffs. In Q2 and Q3 2019 15.19 % and in Q4 2019 and Q1 2020 15.24 % of total mobile subscribers benefited from the conditions of regulated international communications tariffs (Figure 2), while only 0.34 % of total mobile subscribers used alternative pricing provided by mobile network operators for the whole period, which is covered in this Report (Figure 4).

### Intra-EU communication revenues per unit

With regard to revenues from international communications services with regulated price (Figure 11), the average revenues from fixed networks were approximately 0.05 EUR/min (excluding VAT) in Q2 and Q3 2019 and 0.03 EUR/min in Q4 2019 and Q1 2020. In addition, average revenues from fixed international communications services with alternative tariffs were 0.06 EUR/min for the whole period, which is covered in this Report (Figure 13), 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 0.11 EUR/min in Q2 and Q3 2019 and 0.08 EUR/min in Q4 2019

<sup>3</sup> 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.

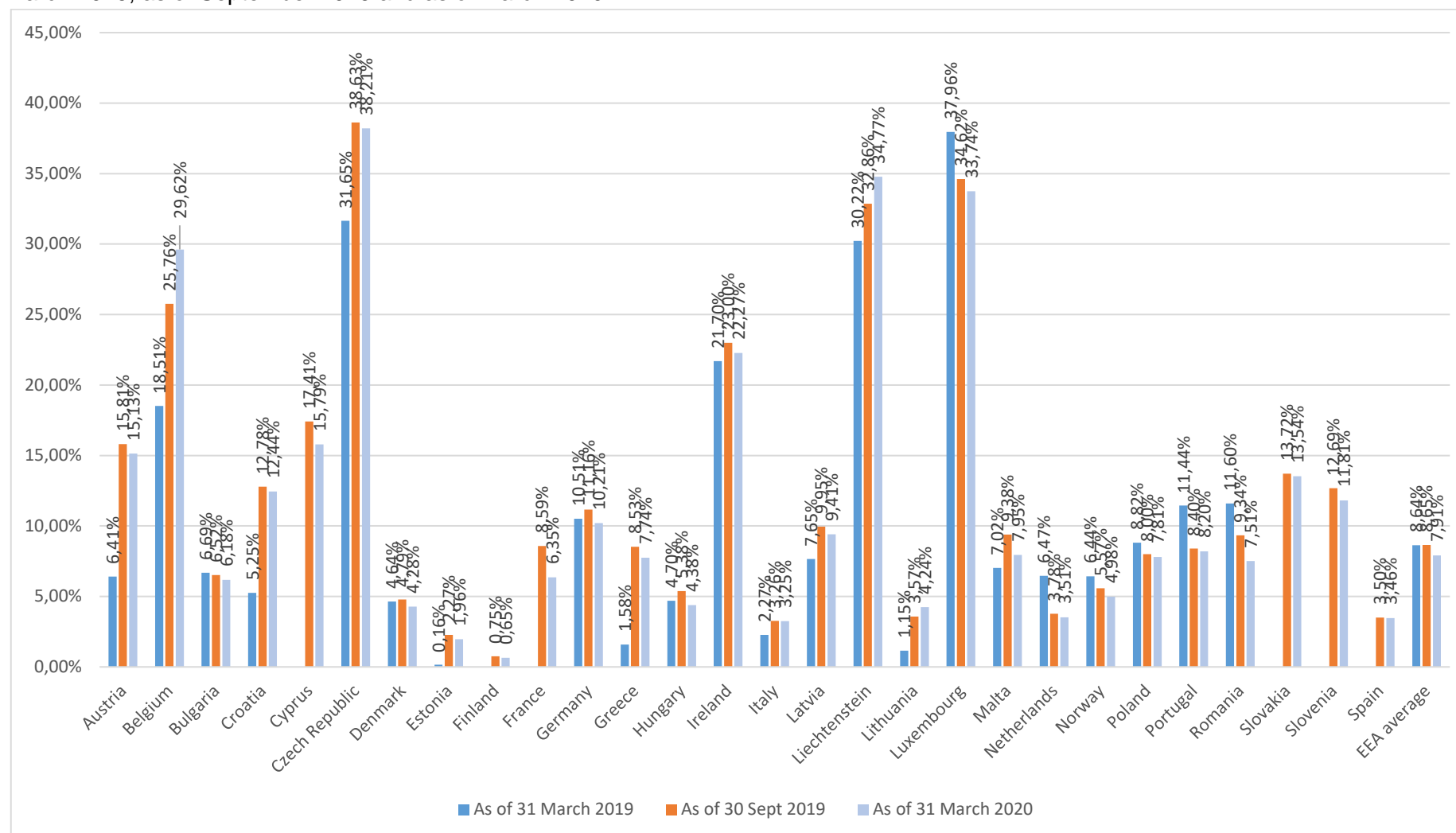
and Q1 2020 (Figure 12). Revenues from alternative tariffs in contrast averaged at 0.18 EUR/min in Q2 and Q3 2019 and 0.19 EUR/min in Q4 2019 and Q1 2020 (Figure 14). Finally, average revenues for SMS reached (Figure 15) 0.07 EUR/SMS in Q2 and Q3 2019 and 0.05 EUR/SMS in Q4 2019 and Q1 2020 while using regulated pricing policy, whereas alternative tariffs in Q2 and Q3 2019 generated 0.19 EUR/SMS and 0.24 EUR/SMS in Q4 2019 and Q1 2020 (Figure 16).



## 5. Charts

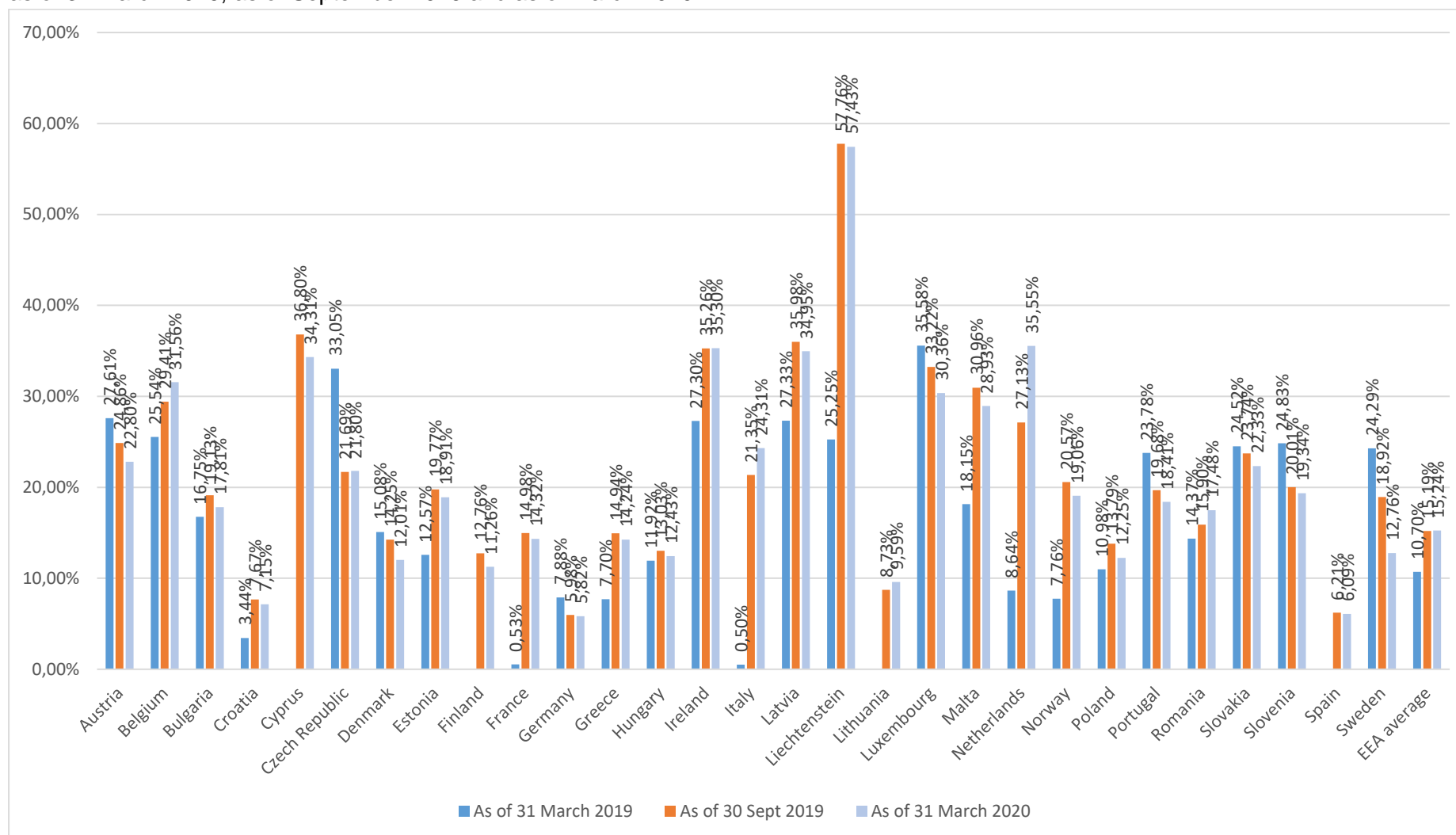
## **5.1. Analysis of fixed and mobile subscribers**

Figure 1: Percentage of fixed subscribers that used intra-EU communications with regulated price from total number of active subscribers, of 31 March 2019, as of September 2019 and as of March 2020



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 2: 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 September 2019 and as of March 2020



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 fixed subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of September 2019 and as of March 2020.

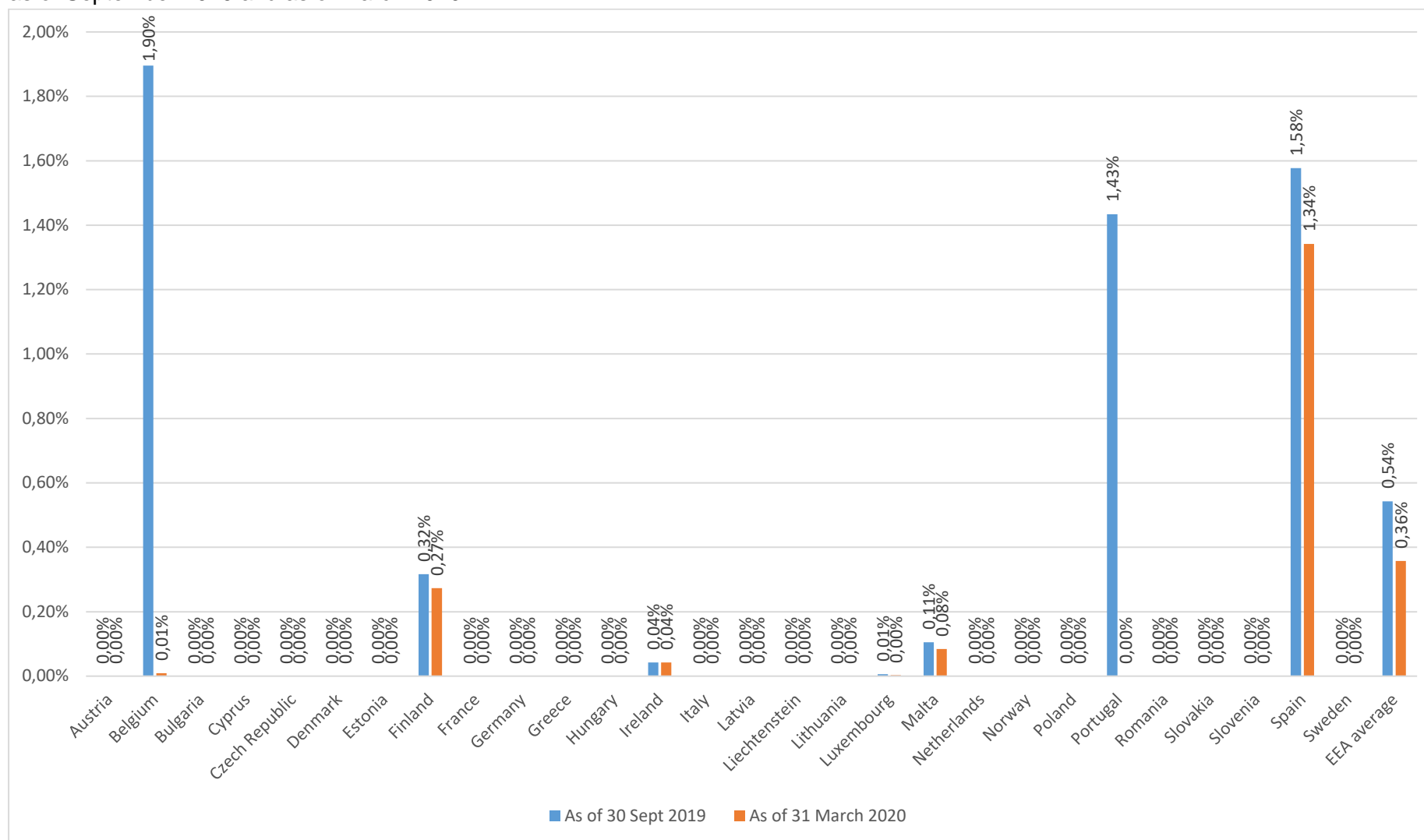
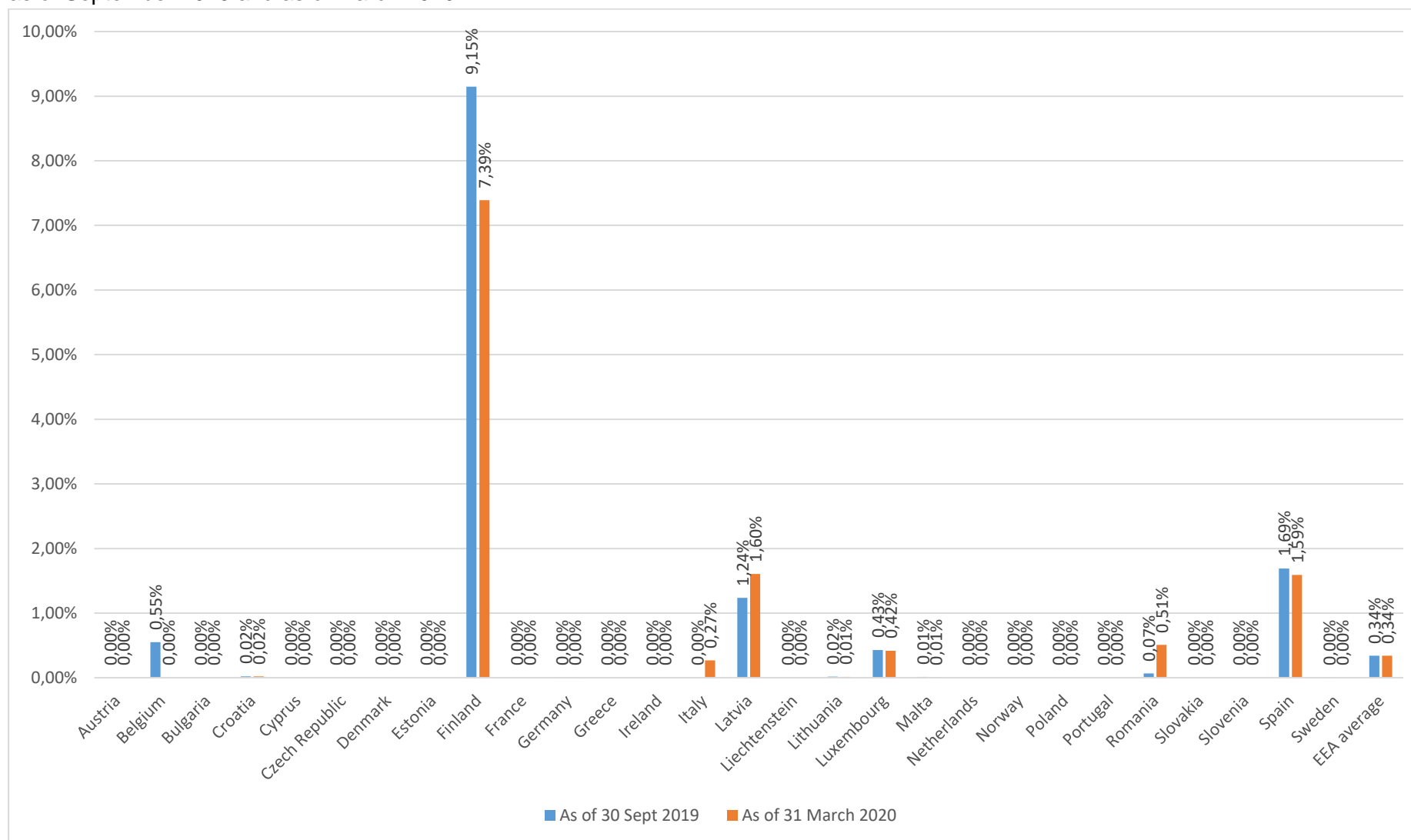


Figure 4 Percentage of mobile subscribers that used intra-EU communications with alternative tariffs from (vs) total number of active subscribers, as of September 2019 and as of March 2020.



Hungary confidential.

## **5.2. Volumes of Intra-EU communications services**

### **5.2.1. Volumes of fixed and mobile voices**

Figure 5: Fixed intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

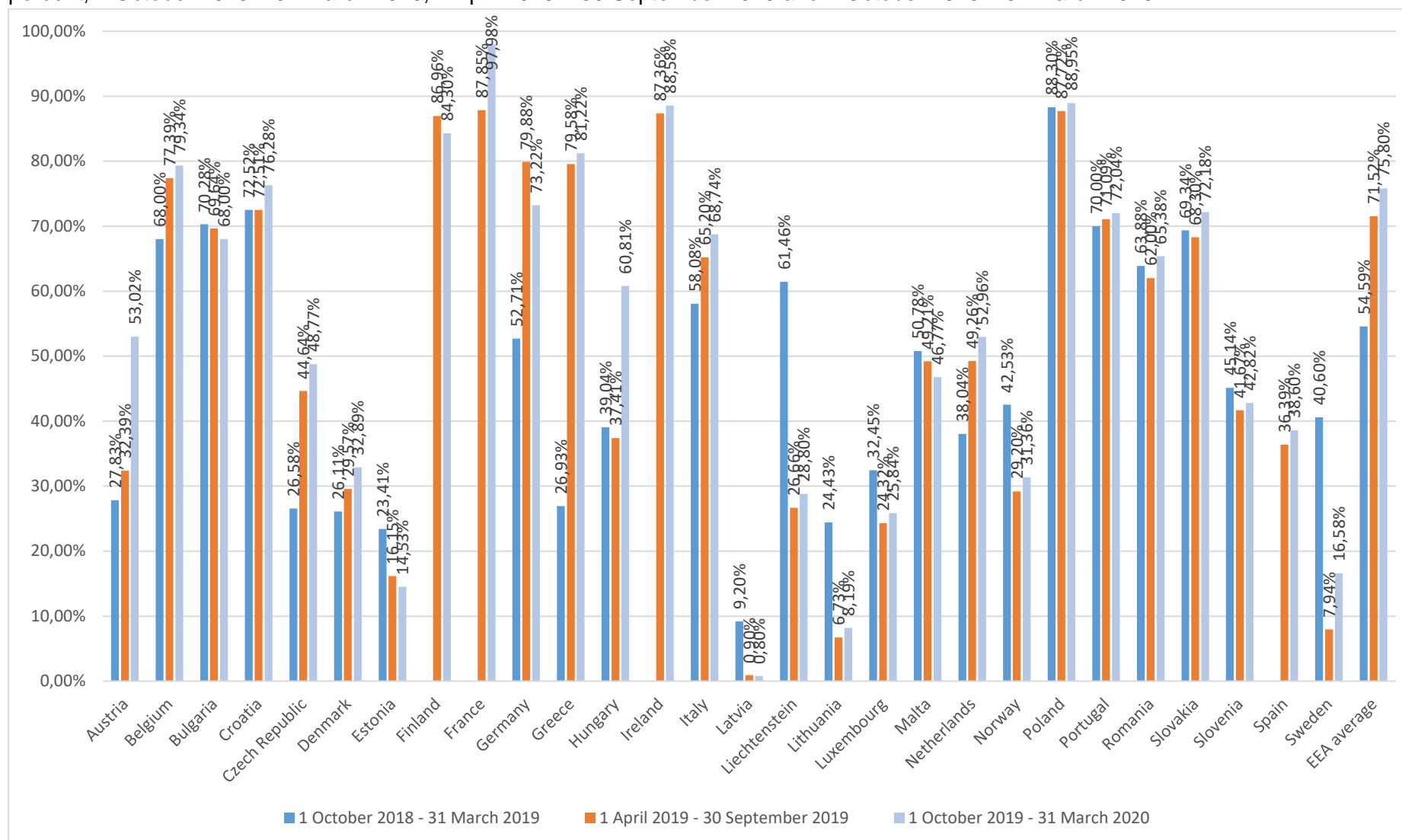




Figure 6: Mobile intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent, 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

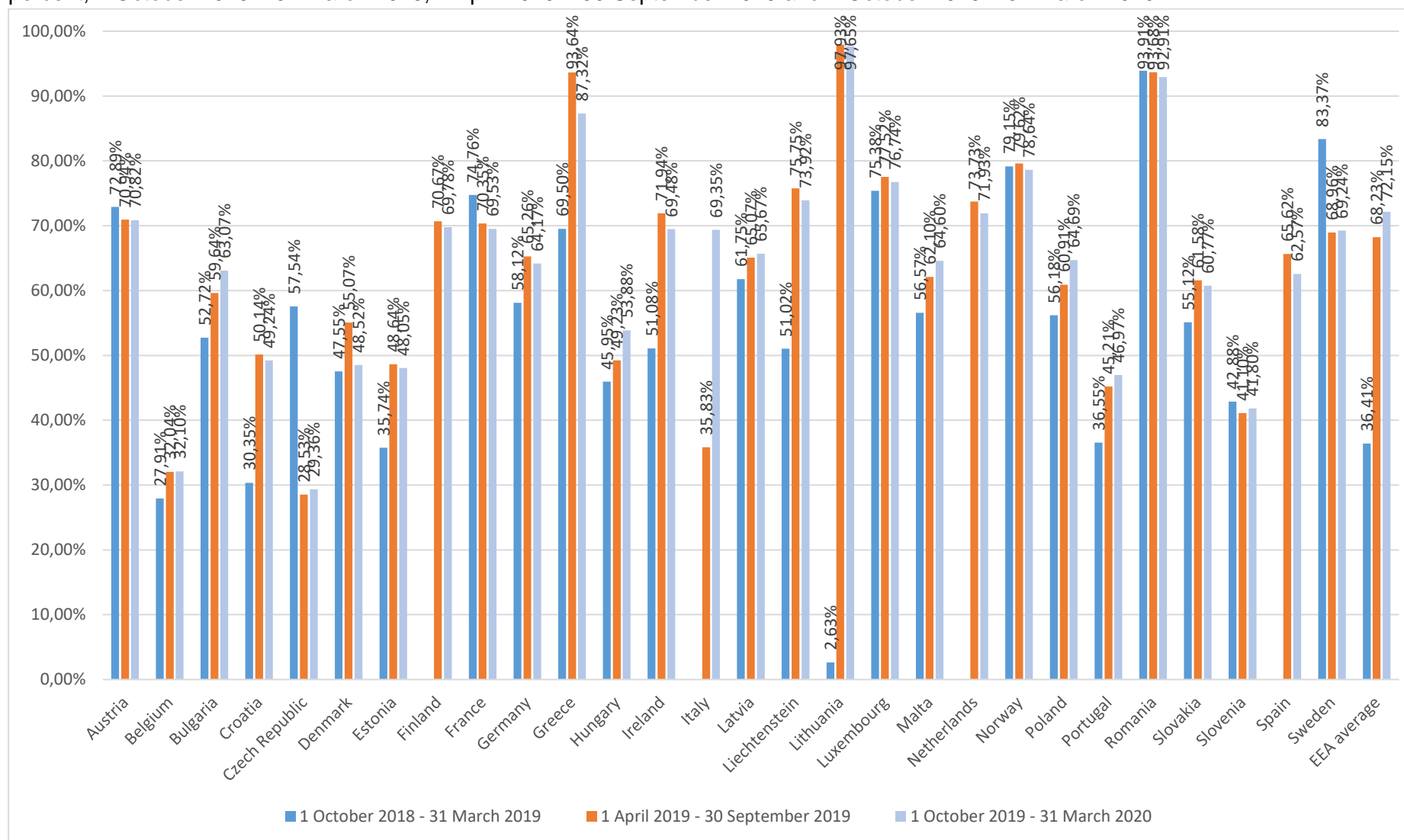


Figure 7: Percentage of fixed price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

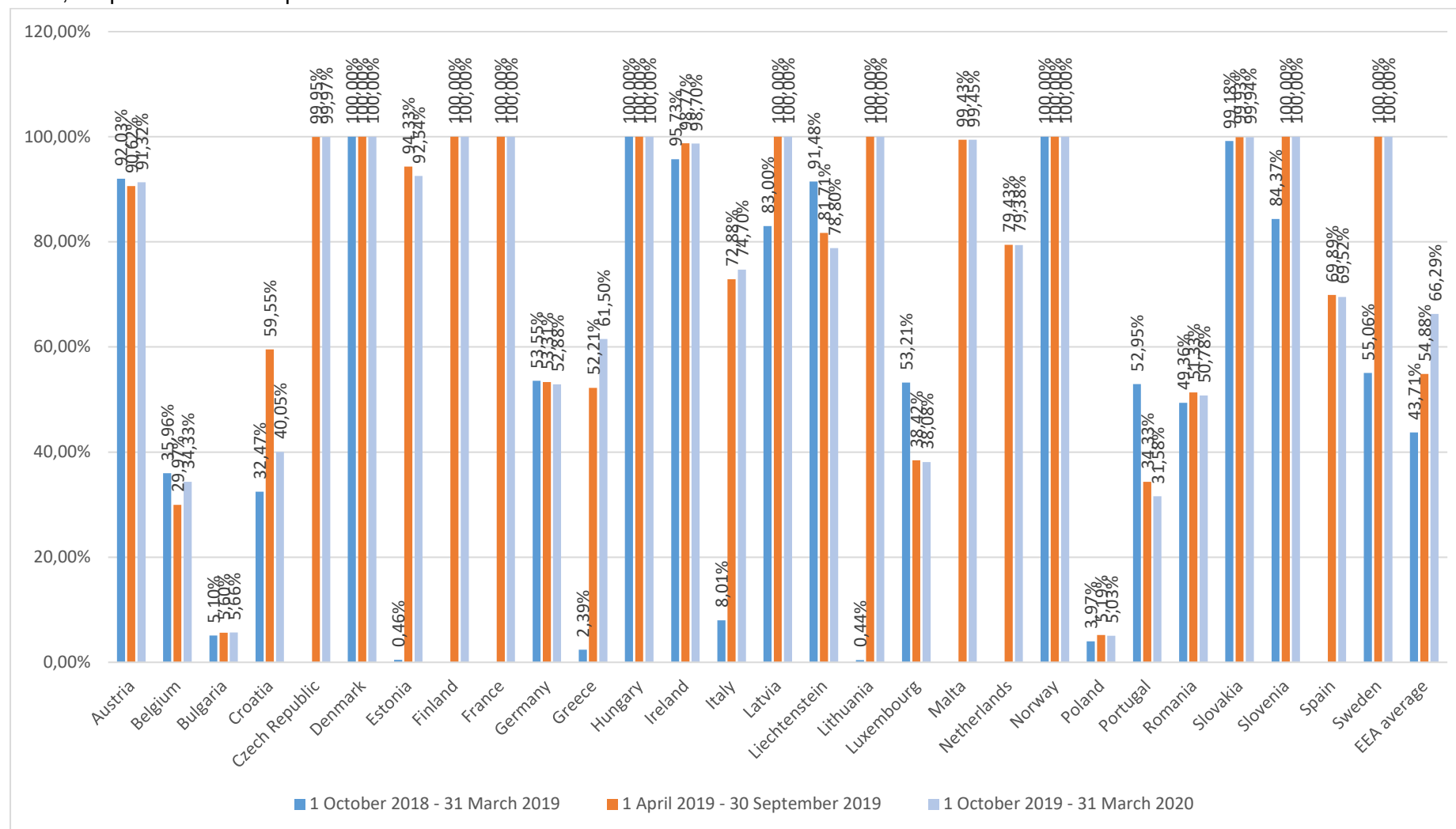
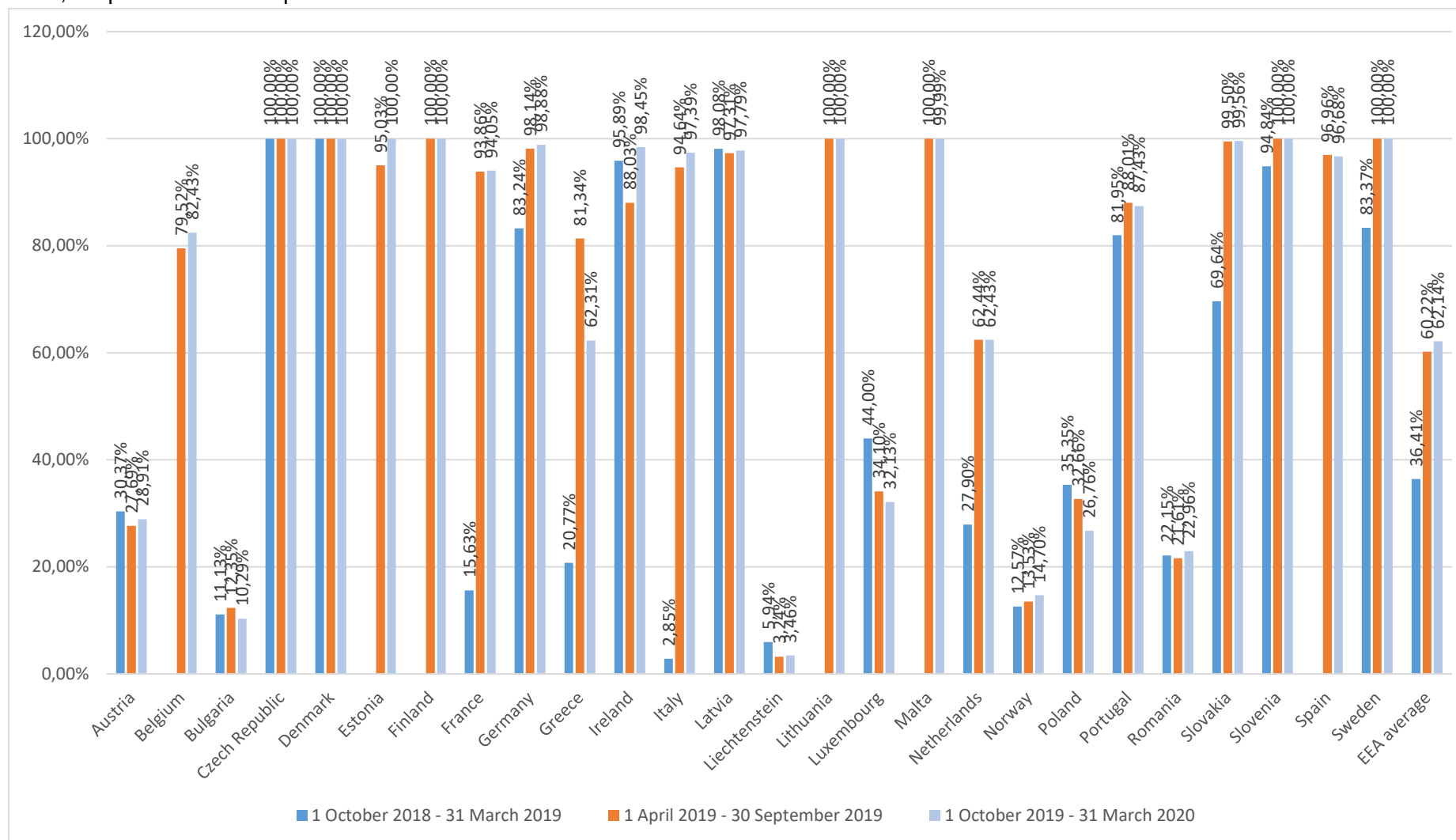


Figure 8: Percentage of mobile price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only), 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



Hungary confidential.

### **5.2.2. Volumes of SMS**

Figure 9: Percentage of SMS sent by consumers from (vs) total originated intra-EU SMS (consumers + business), 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

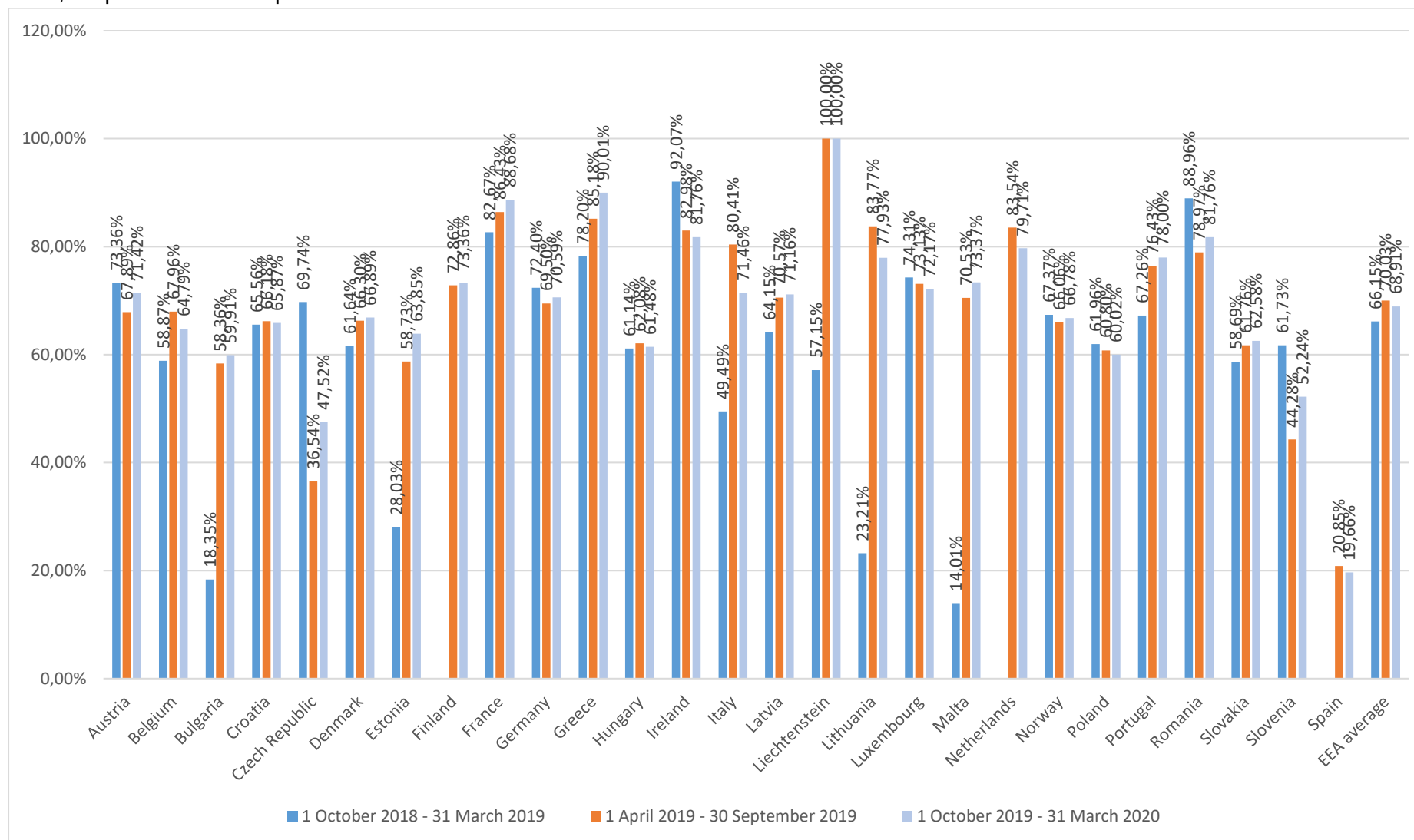
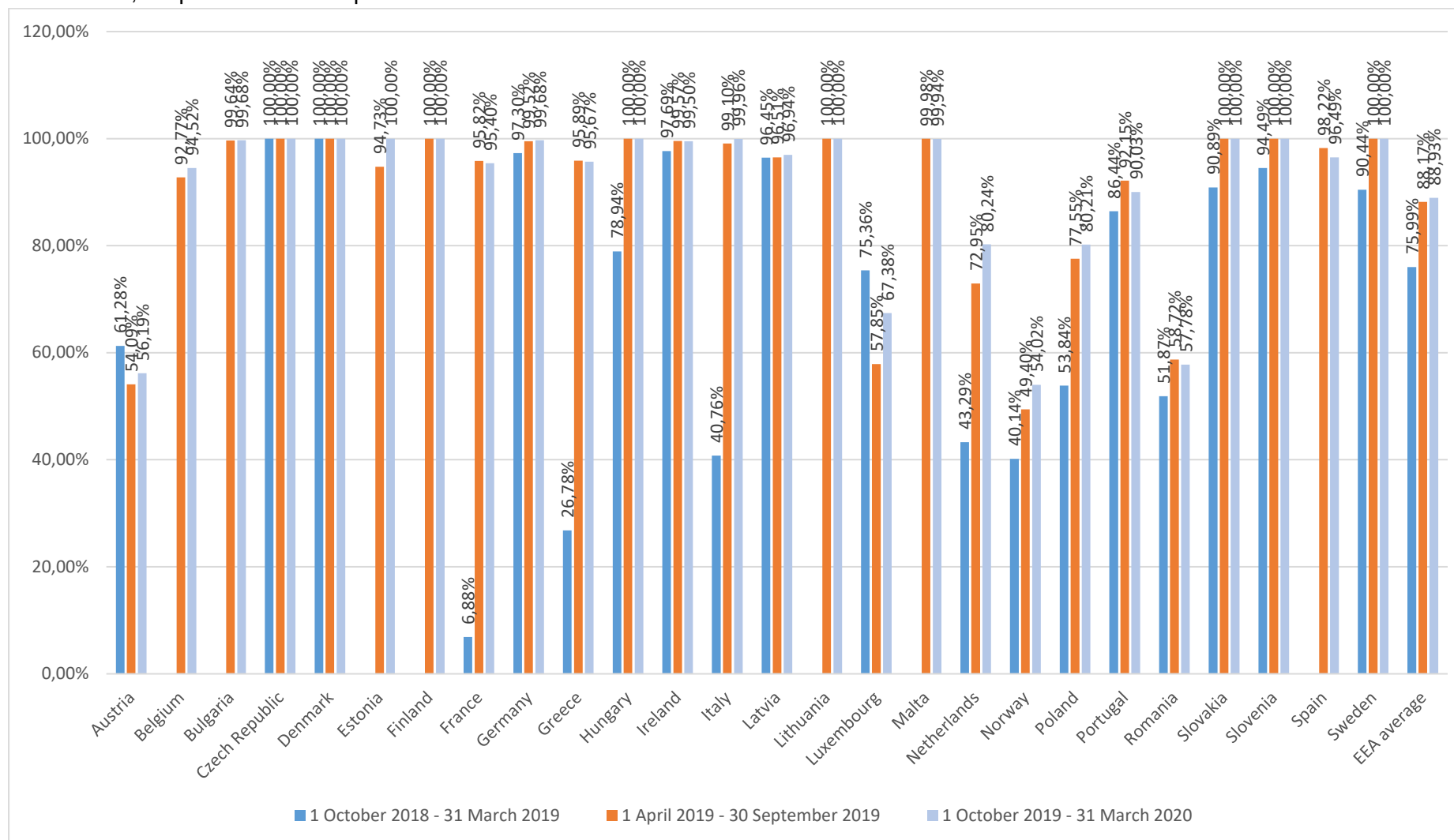


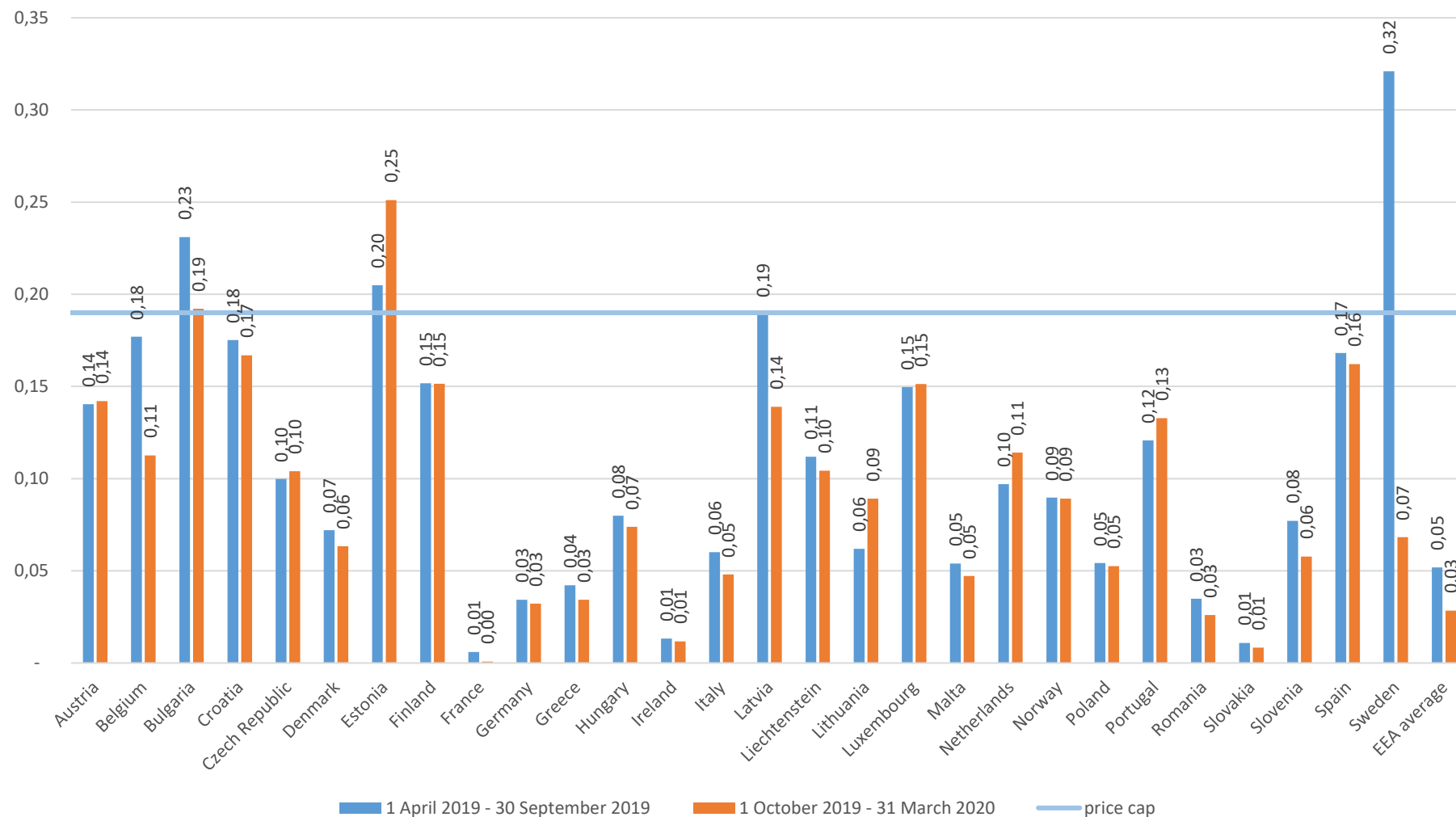
Figure 10: Percentage of price regulated intra-EU communications (vs) total originated intra-EU SMS (consumers only), 1 October 2019 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



### **5.3. Revenues per unit of Intra-EU communication services**

#### **5.3.1. Revenues of fixed and mobile voices**

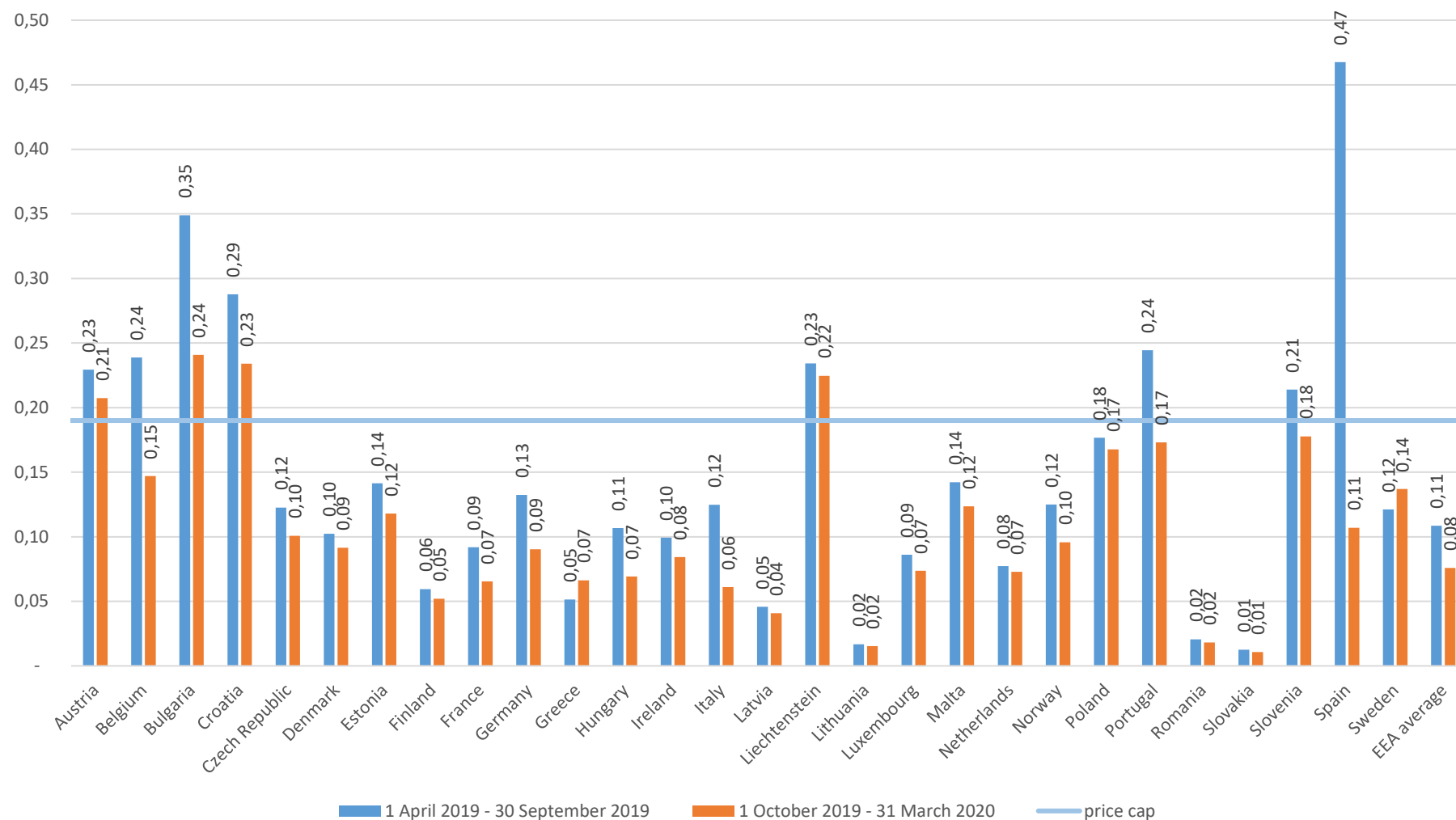
Figure 11: Revenues (in EUR) per fixed min for price regulated intra-EU calls, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption.

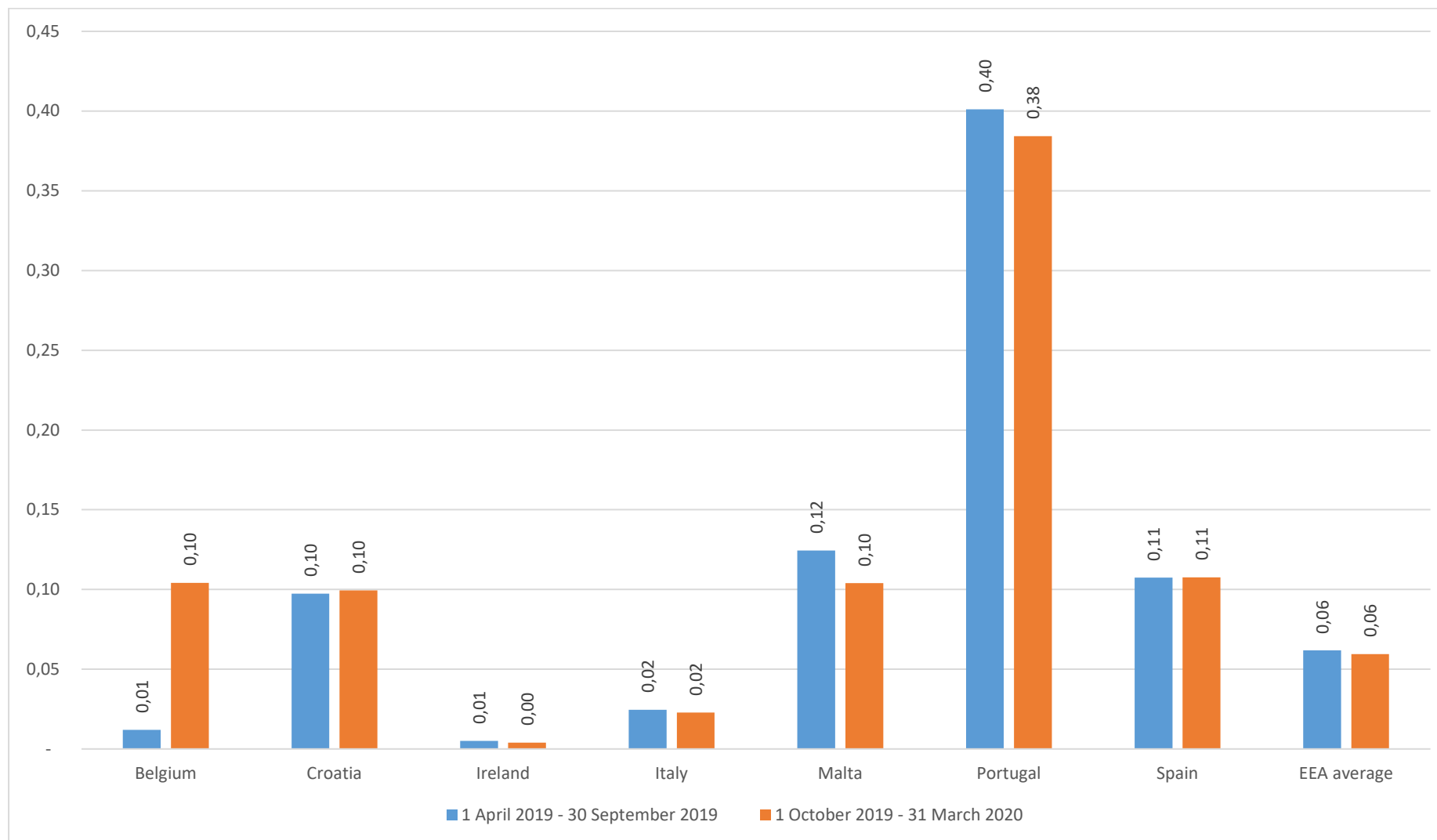


Figure 12: Revenues (in EUR) per mobile min for price regulated intra-EU calls, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



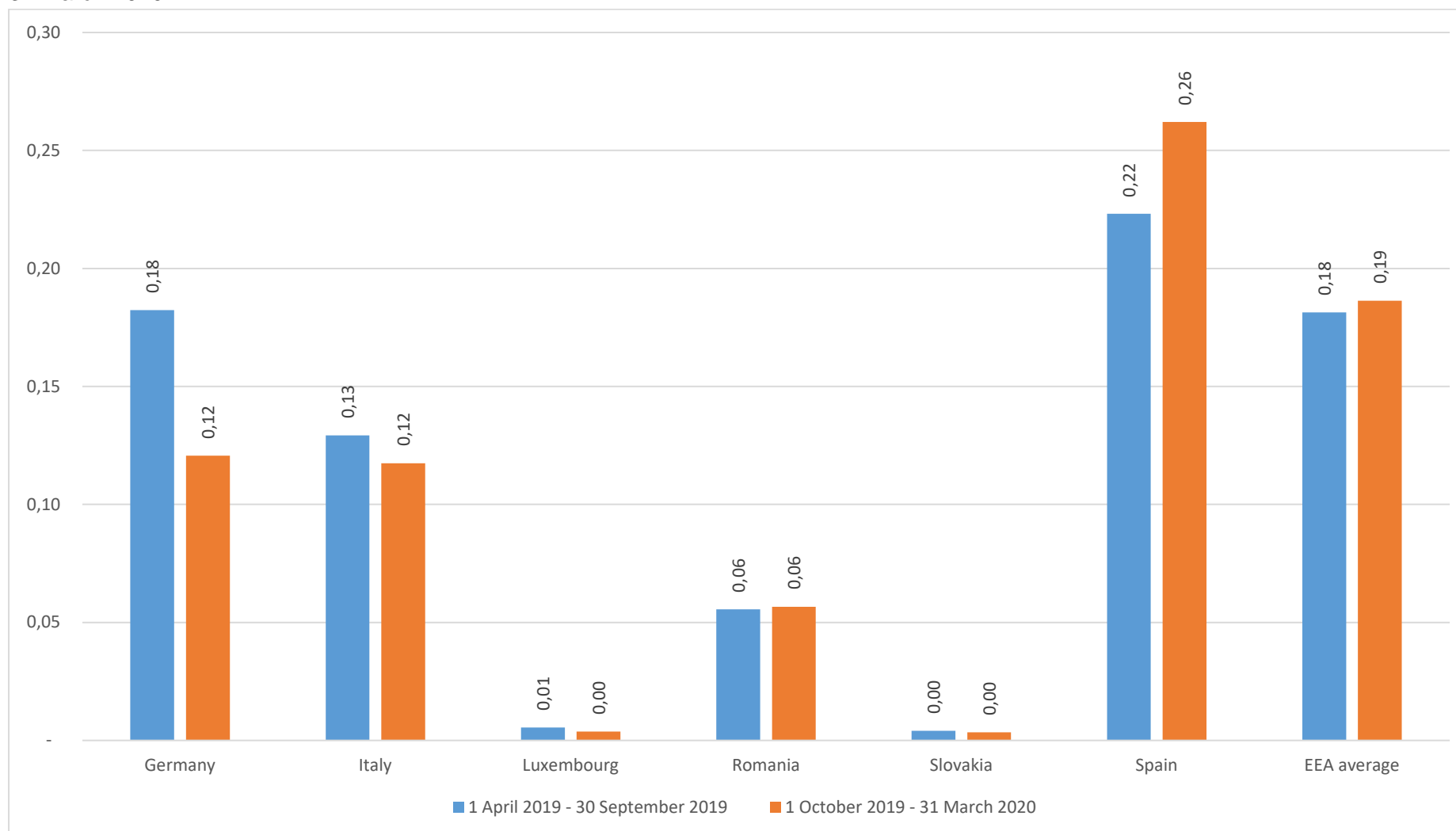
Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption.

Figure 13: Revenues (in EUR) per fixed min for intra-EU calls from alternative tariffs, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



Only few of the EU operators are offering alternative plans for fixed network regulated international communications.

Figure 14: Revenues (in EUR) per mobile min for intra-EU calls from alternative tariffs, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



Hungary confidential.

Only few of the EU operators are offering alternative plans for mobile network regulated international communications.

#### **5.3.2. SMS revenues**

Figure 15: Revenues per SMS for price regulated intra-EU messages, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

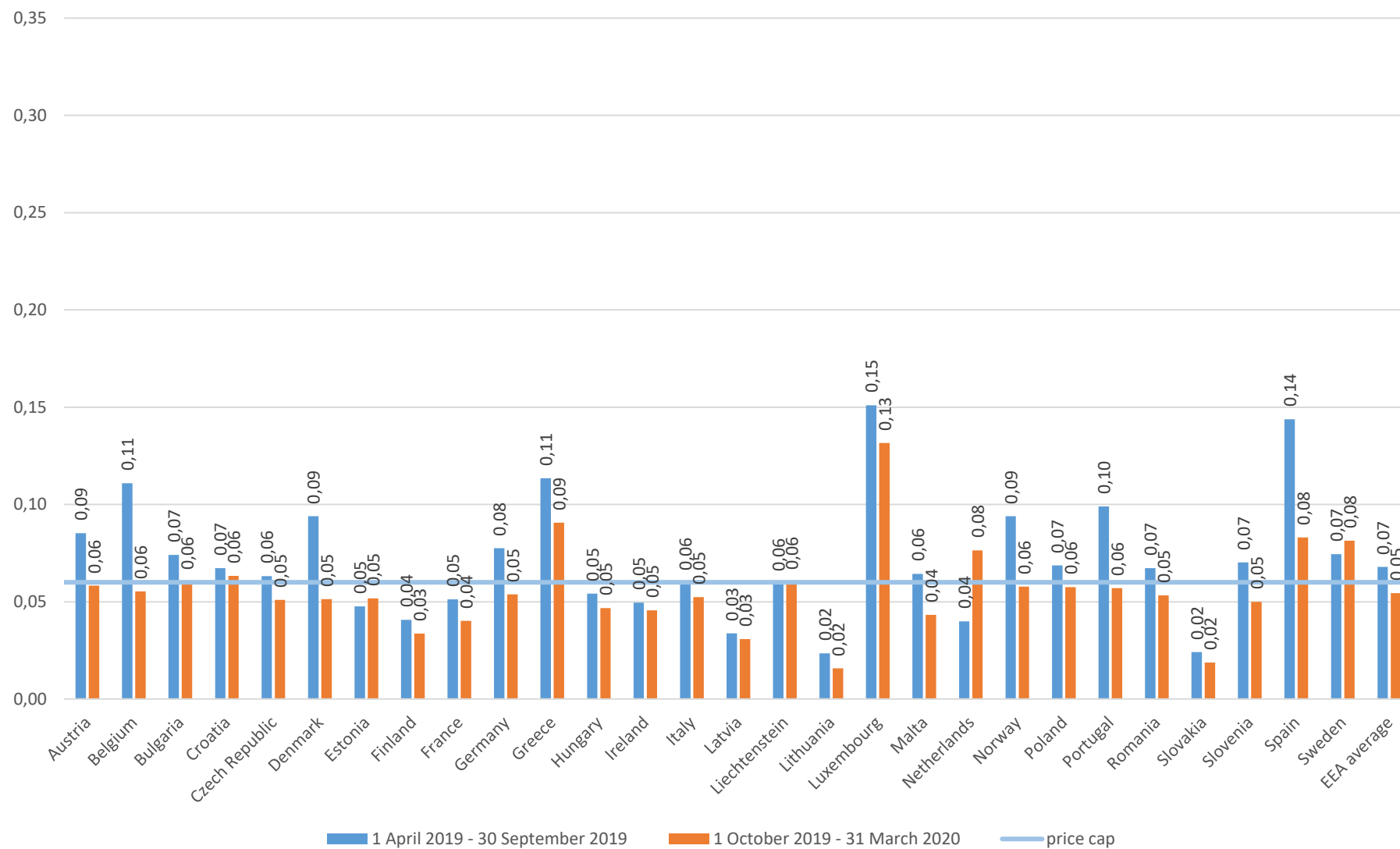
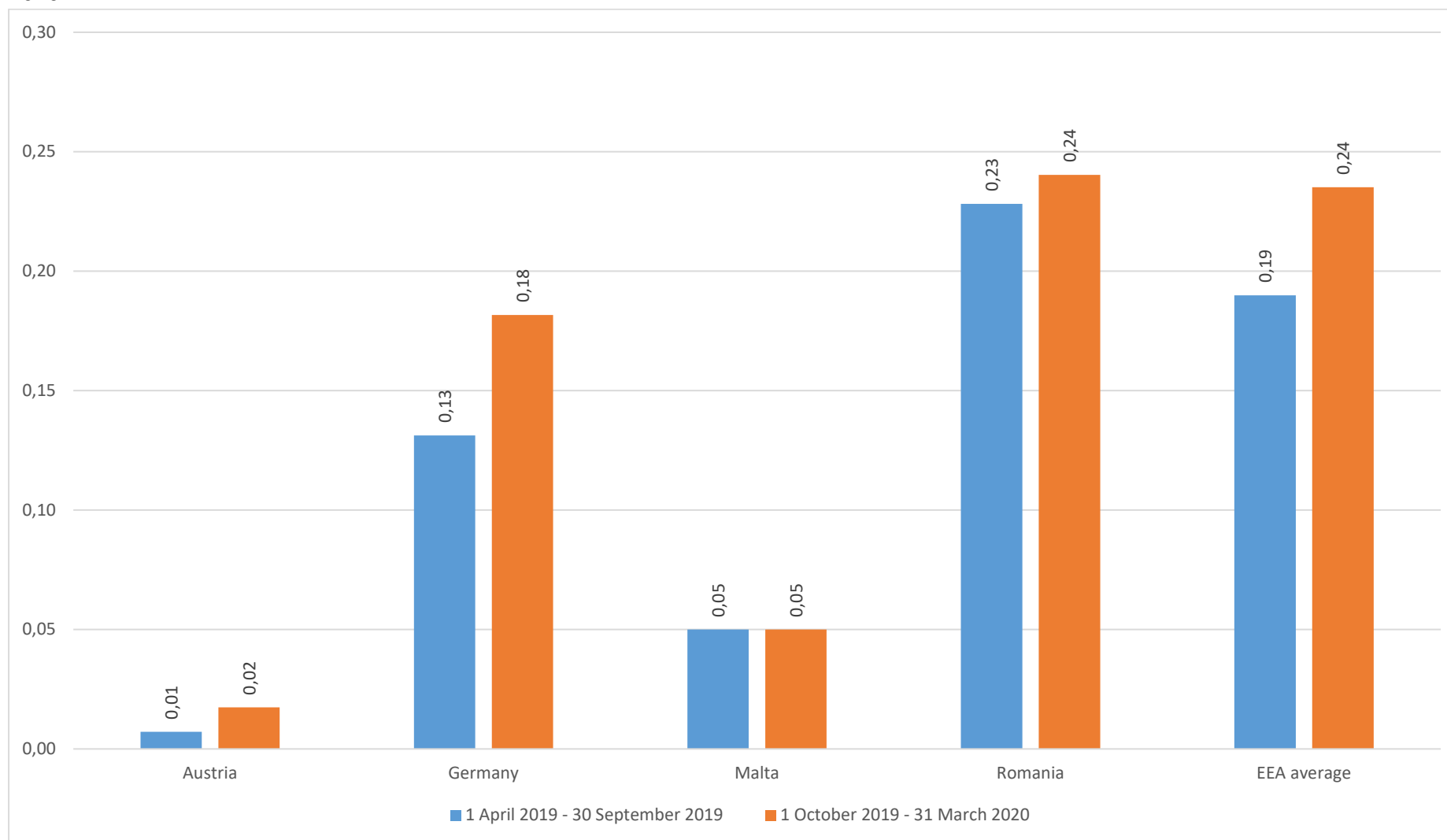


Figure 16: Revenues per SMS for intra-EU messages from alternative tariffs, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.



Only few of the EU operators are offering alternative plans for mobile network regulated international communications.

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

Figure 17: Average number of fixed Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

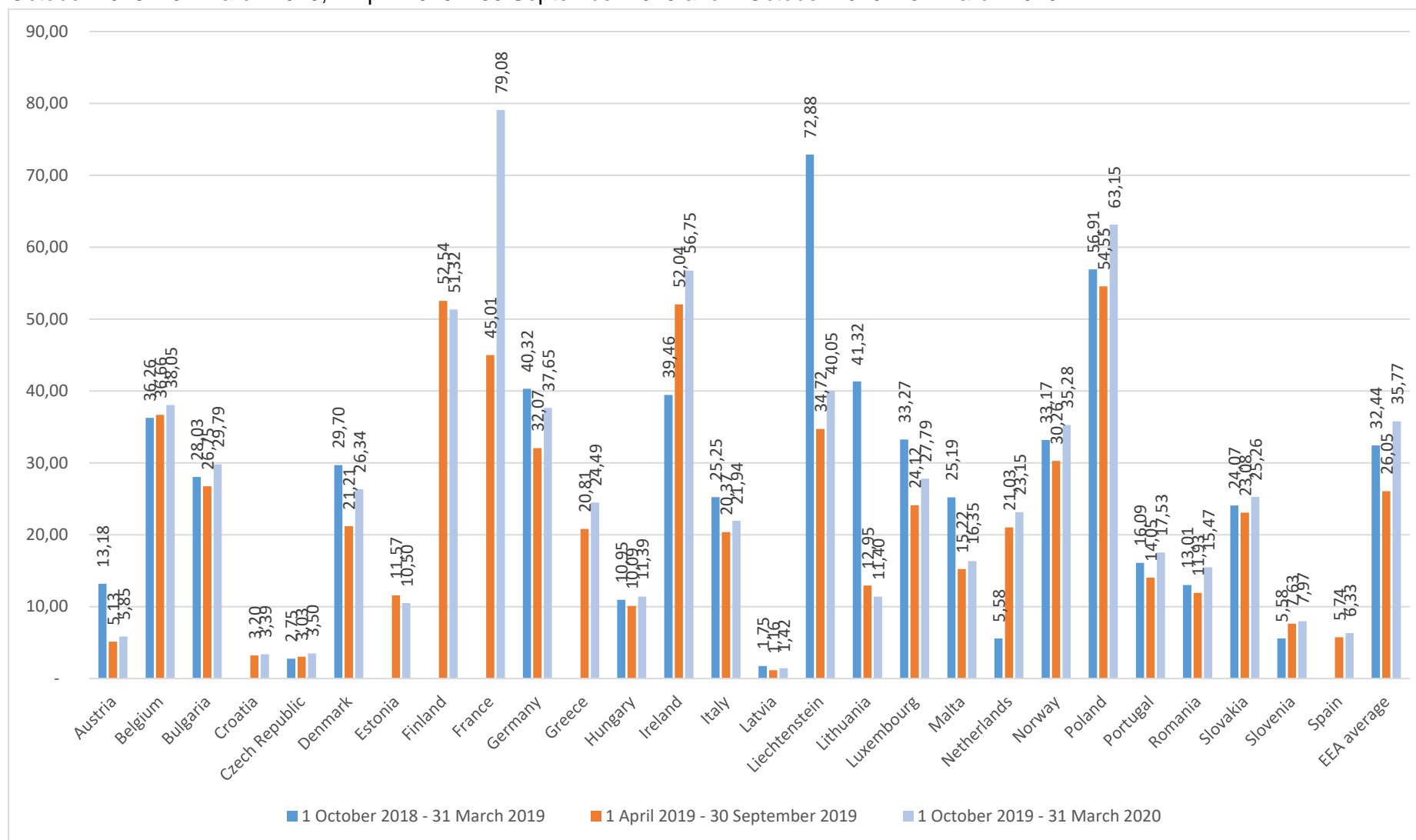




Figure 18: Average number of mobile Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020.

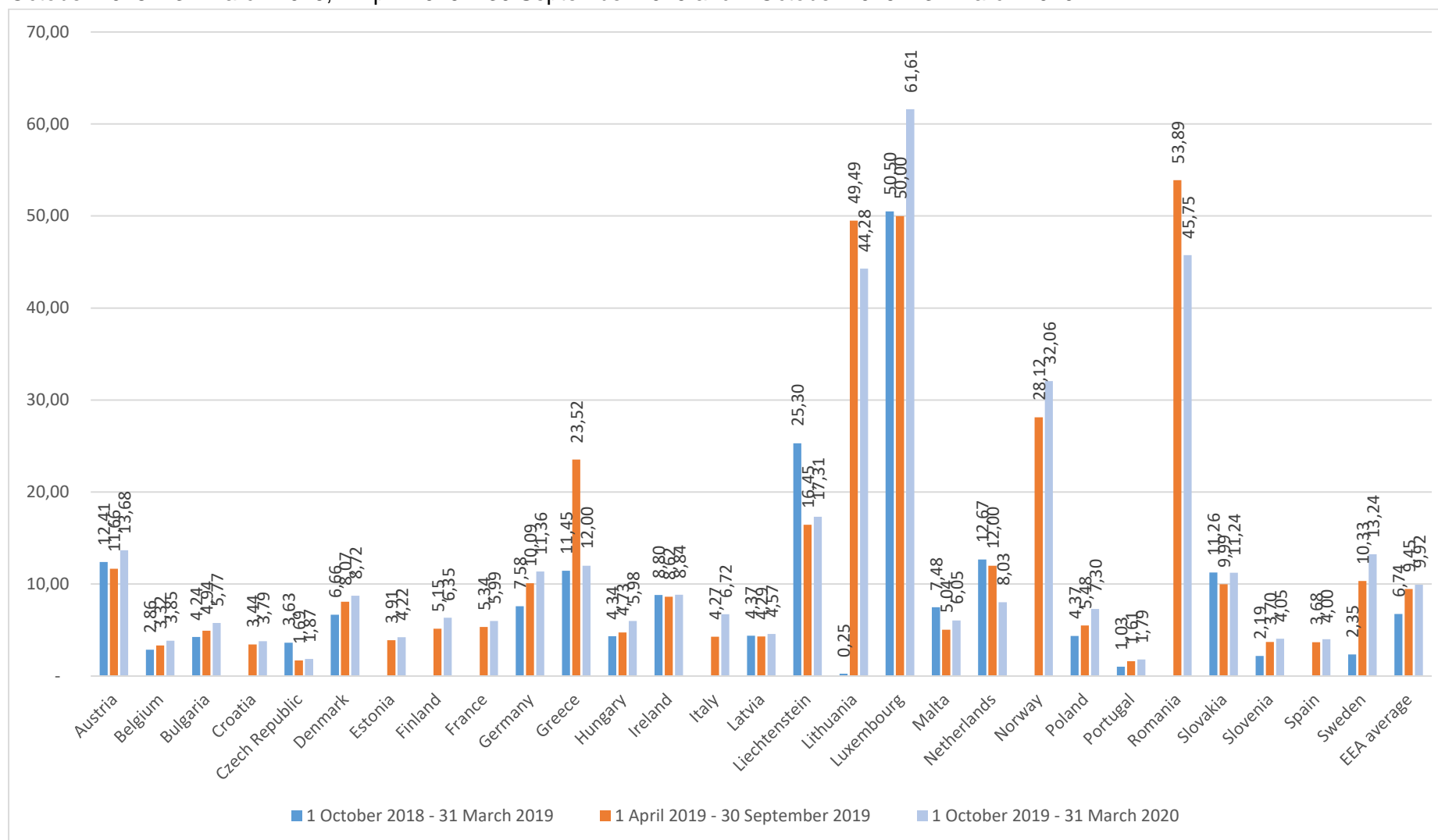
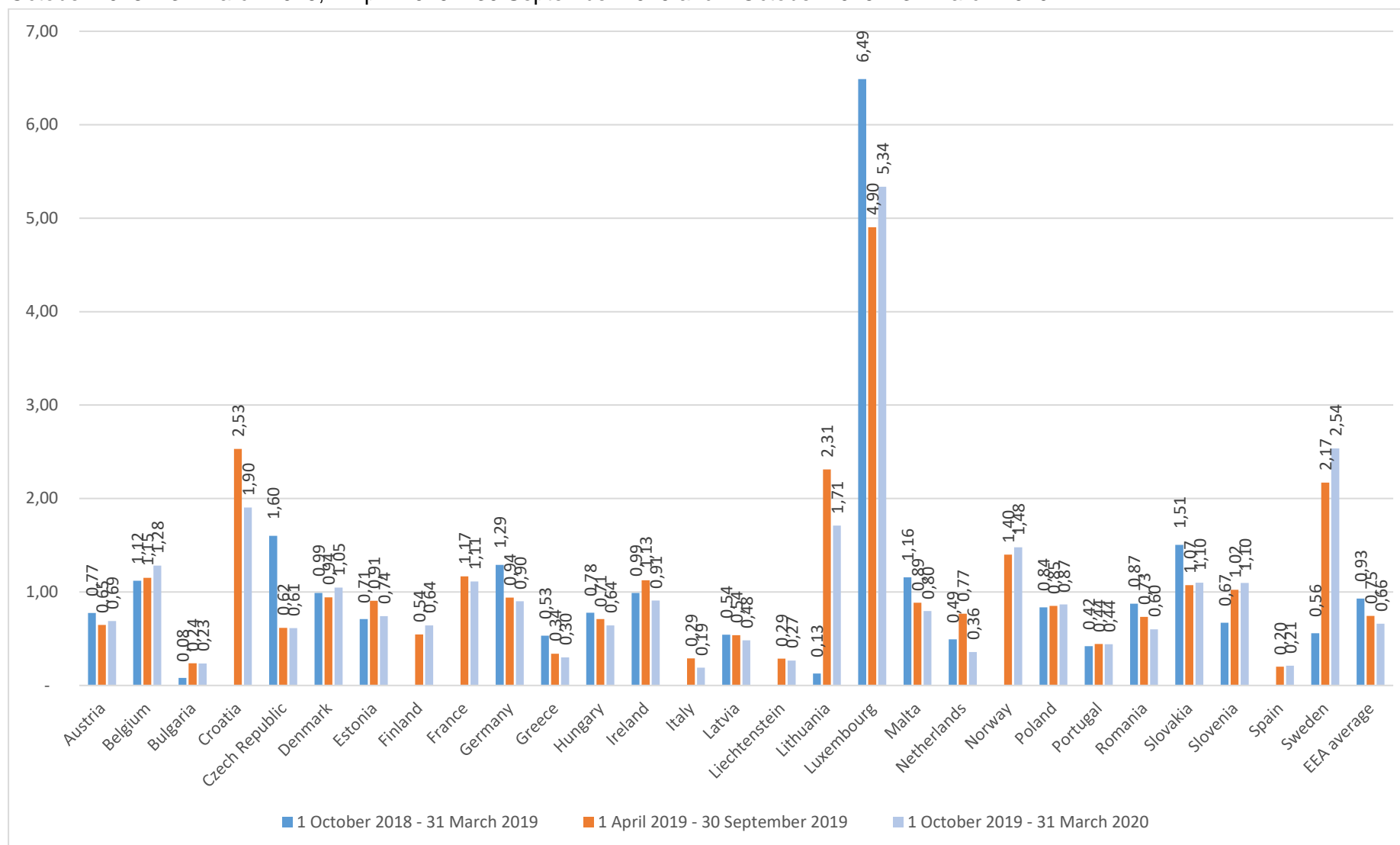


Figure 19: Average number of mobile Intra-EU SMS per month per subscriber (subscribers that used Intra-EU communications services), 1 October 2018 – 31 March 2019, 1 April 2019 – 30 September 2019 and 1 October 2019 – 31 March 2020



## **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. All averages are based on billed minutes of voice calls or billed SMS, unless expressly stated otherwise.

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 2019 – 31 March 2020:

### Austria

A1 Telekom Austria  
ATK  
HoT Telekom  
Hutchison 3G Austria  
kabelplus  
LTK  
Lycamobile  
Mass Response  
MTEL  
Porsche Smart Mobility  
RTK  
Russmedia  
Smartspace  
T-Mobile Austria

### Belgium

Proximus  
Telenet Group  
Orange Belgium

### Bulgaria

Bulgarian Telecommunication Company  
(Vivacom)  
Telenor Bulgaria  
A1 Bulgaria  
Coolbox

### Croatia

Hrvatski Telekom  
A1 Hrvatska  
Tele2

### Cyprus

Cablenet  
Cyta  
Epic  
Primetel

### Czech Republic

BVfon Czech Telecommunication  
Ceteris  
ČEZ Prodej  
Dial Telecom

Mikrotech

MiniTel

Nej.cz

Nordic Telecom

O2 Family

O2 Czech Republic

SAZKA

TERMS

Tesco Mobile ČR

T-Mobile Czech Republic

UPC Česká Republika

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

EI 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**

Telenor Magyarország Zrt.  
Magyar Telekom Nyrt.  
Vodafone Magyarország Zrt.  
UPC Mobile  
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 Mobile,  
Mobisile Communications (GO Mobile)  
Vodafone Malta

### **Netherlands**

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

### **Norway**

Ice  
Lycamobile  
Telenor  
Telia Norge

### **Poland**

Inea  
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**

Digital Cable Systems  
Nextgen Communications  
Orange Romania  
RCS&RDS  
Vodafone Romania (includes data for UPC Romania)  
Telekom 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