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TRENDS IN  
TELECOMMUNICATIONS  
PRICES  
SEP '16

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ANACOM



AUTORIDADE  
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## 1. Trends in telecommunications prices<sup>1</sup> - September 2016

According to INE (Statistics Portugal)<sup>2</sup>, in September 2016, telecommunications prices in Portugal increased by 0.59 percent over the previous month (unchanged in September 2015). The increase results from changes in pre-paid mobile Internet tariffs of one of the leading providers (for example, one of these tariffs increased by 1.2 euros or 14 percent) and from the increase in the monthly subscription charge of the triple-play bundle from another leading provider (+2 euros or +7 percent)<sup>1</sup>.

Versus September 2015, telecommunications prices<sup>1</sup> increased by 1.66 percent, while increasing by 2,79 percent on average over the last twelve months.

**Table 1 - Change in Consumer Price Index (CPI) and in telecommunications prices<sup>1</sup>**

	September 2016			2015
	Year-on-Year change	Average change 12 months	Change versus prior month	Average change 12 months
<b>CPI</b>	0.63%	0.55%	0.69%	0.49%
Telecommunications <sup>1</sup>	1.66%	2.79%	0.59%	3.90%
<b>Ranking in descending order (43 groups)</b>	<b>9</b>	<b>6</b>	<b>9</b>	<b>6</b>

Source: INE (Statistics Portugal)

Unit: %

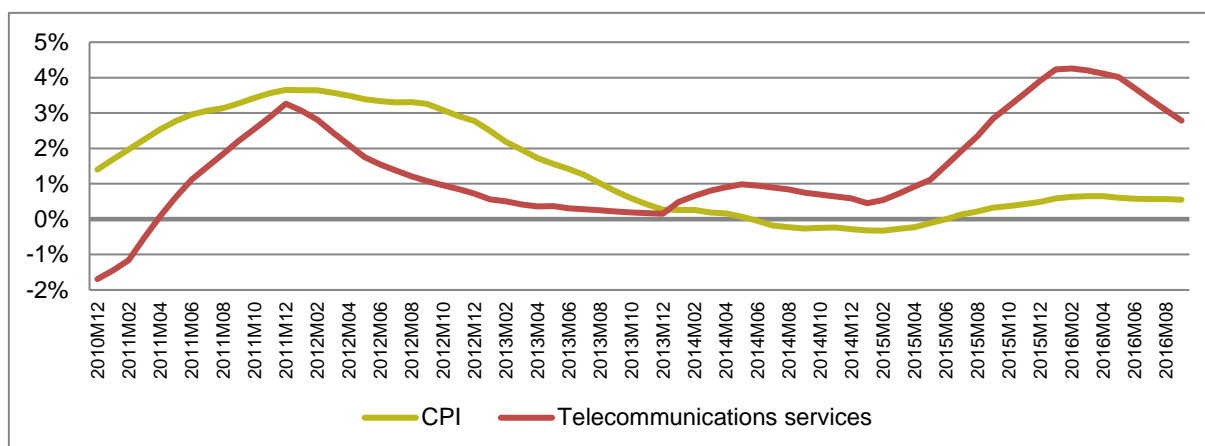
On a year-on-year basis, the increase in prices (1.66 percent) was the 9th highest among the various sectors of the Portuguese economy. The difference between this increase and the change in CPI was reported at 1.03 percentage points.

On average terms, the annual increase in prices reported (2.79 percent) was the 6th highest among the 43 products/service considered.

Since January 2014, telecommunications prices<sup>1</sup> have been increasing at average annual rates above the rate of change reported in CPI. Since February 2016, the difference between the two rates has been narrowing and in September 2016, the difference was reported at 2.24 percentage points.

<sup>2</sup> See "Consumer Price Index – September 2016" (INE – Statistics Portugal, 2016), available at [https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_destaquas&DESTAQUESdest\\_boui=249872984&DESTAQUESmodo=2&xlang=en](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaquas&DESTAQUESdest_boui=249872984&DESTAQUESmodo=2&xlang=en)

**Graph 1 – Average 12-month change in CPI and telecommunications prices**



Source: INE (Statistics Portugal)  
Unit: %

## 2. Trends in telecommunications prices<sup>1</sup> in the EU<sup>3</sup> September 2016

According to EUROSTAT<sup>4</sup>, in September 2016, the increase in prices in average annual terms reported in Portugal was 2.83 percentage points above the EU average<sup>3</sup>. On average annual terms, Portugal reported the third highest increase in prices in the EU. The two countries with larger increases were Slovenia and Belgium

In relation to September 2015, the increase in telecommunications prices<sup>1</sup> in Portugal is the 8th largest in the EU<sup>5,3</sup>

**Table 2 – Change in telecommunications price 1: Portugal vs EU<sup>3</sup>**

	September 2016			2015
	Year-on-Year change	Average change 12 months	Change versus prior month	Average change 12 months
EU <sup>3</sup>	-0.17%	-0.04%	0.08%	-0.28%
Portugal	1.67%	2.79%	0.59%	3.90%
<b>PT / EU difference<sup>3</sup></b>	<b>1.74 p.p</b>	<b>2.83 p.p</b>	<b>0.51 p.p</b>	<b>4.19 p.p</b>
<b>Ranking in descending order (23 countries)</b>	<b>8</b>	<b>3</b>	<b>4</b>	<b>1</b>

Unit: %, p.p.

**Note:** Information for Ireland, Sweden and United Kingdom not available. Malta and Netherlands are not included in the ranking due to a lack of available information before December 2015.

<sup>3</sup> Information for Ireland, Sweden and United Kingdom not available. Information available from December 2015 for Malta and Netherlands.

<sup>4</sup> See HICP - monthly data (EUROSTAT, 2016), available at [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=prc\\_hicp\\_midx&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=prc_hicp_midx&lang=en).

Methodology described at

[http://ec.europa.eu/eurostat/statistics-explained/index.php/HICP\\_methodology](http://ec.europa.eu/eurostat/statistics-explained/index.php/HICP_methodology)

<sup>5</sup> Larger increases were reported in Belgium, Finland, Slovenia, France Spain, Lithuania and Luxembourg.

## Trends in telecommunications prices<sup>1</sup>

### Summary

- In September 2016, telecommunications prices in Portugal<sup>1</sup> increased by 0.59 percent versus the previous month (versus no change in September 2015). The increase results from changes in pre-paid mobile Internet tariffs of one of the leading providers (for example, one of these tariffs increased by 1.2 euros or 14 percent) and from the increase in the monthly subscription charge of the triple-play bundle of another leading provider (+2 euros or +7 percent).

In year-on-year terms, the increase in prices (1.65 percent) was the 9th highest among the sectors of the Portuguese economy.

On average annual terms, prices increased by 2.79 percent, 2.24 percentage points over inflation (0.55 percent). The increase in prices was the 6th highest among the 43 products/services considered.

Since January 2014, telecommunications prices<sup>1</sup> have been increasing at average annual rates above the rate of change reported in CPI.

- On average annual terms, Portugal reported the third highest increase in prices in the EU in September 2016. On average, telecommunications prices<sup>1</sup> in the EU fell by 0.04 percent.

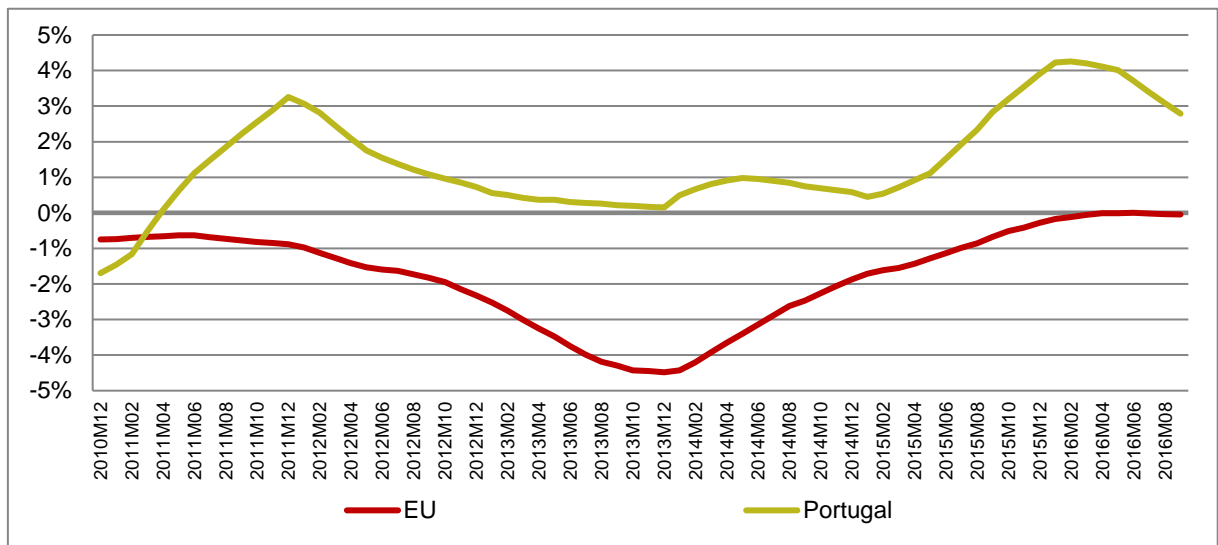
Since March 2011, telecommunications prices<sup>1</sup> have increased more in Portugal than in the EU. However, the difference has been narrowing since February 2016.

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<sup>1</sup> "Telephone, telegraph and telefax services" sub-index of the Consumer Price Index (CPI) and of the Harmonised Indices of Consumer Prices (HICP), which comprises voice, Internet and subscription TV (STV) services acquired on a stand-alone basis or as part of a bundle of services. The price analysis presented here should be taken alongside an assessment of the offer characteristics – see information available in the reports "Bundles of electronic communications services", "Telephone service at a fixed location and nomadic VoIP", "Mobile services", "Internet access service" and "Subscription television service", all available on ANACOM's website

Since March 2011, telecommunications prices<sup>1</sup> have risen more in Portugal than in the EU<sup>3</sup> (in terms of average annual change). However, the difference has been narrowing since February 2016.

**Graph 2 – Average rate of change over previous twelve months - telecommunications prices: Portugal vs EU<sup>3</sup>**



Source: EUROSTAT  
Unit: %

**Note:** From the publication, by EUROSTAT, on 25 February 2016, of data for January 2016, the reference year of the HICP series was changed from 2005 to 2015.

There may be differences in the series due to rounding effects. For more information, see <http://ec.europa.eu/eurostat/documents/272892/272971/HICP+reference+year+2015%3D100/>.

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