

### *Performance Review of Europe's Mobile Markets 4<sup>th</sup> edition*

OMSYC-QUANTIFICA has just released the 4th edition of its Performance Review of Europe's Mobile Markets. This year's performance review now covers 13 countries : Germany, Austria, Belgium, Spain, Finland, France, Italy, Norway (new), Netherlands, Portugal, United Kingdom, Sweden and Switzerland (new). For more information [www.omsyc.com](http://www.omsyc.com).

#### *Finland remains competitive...*

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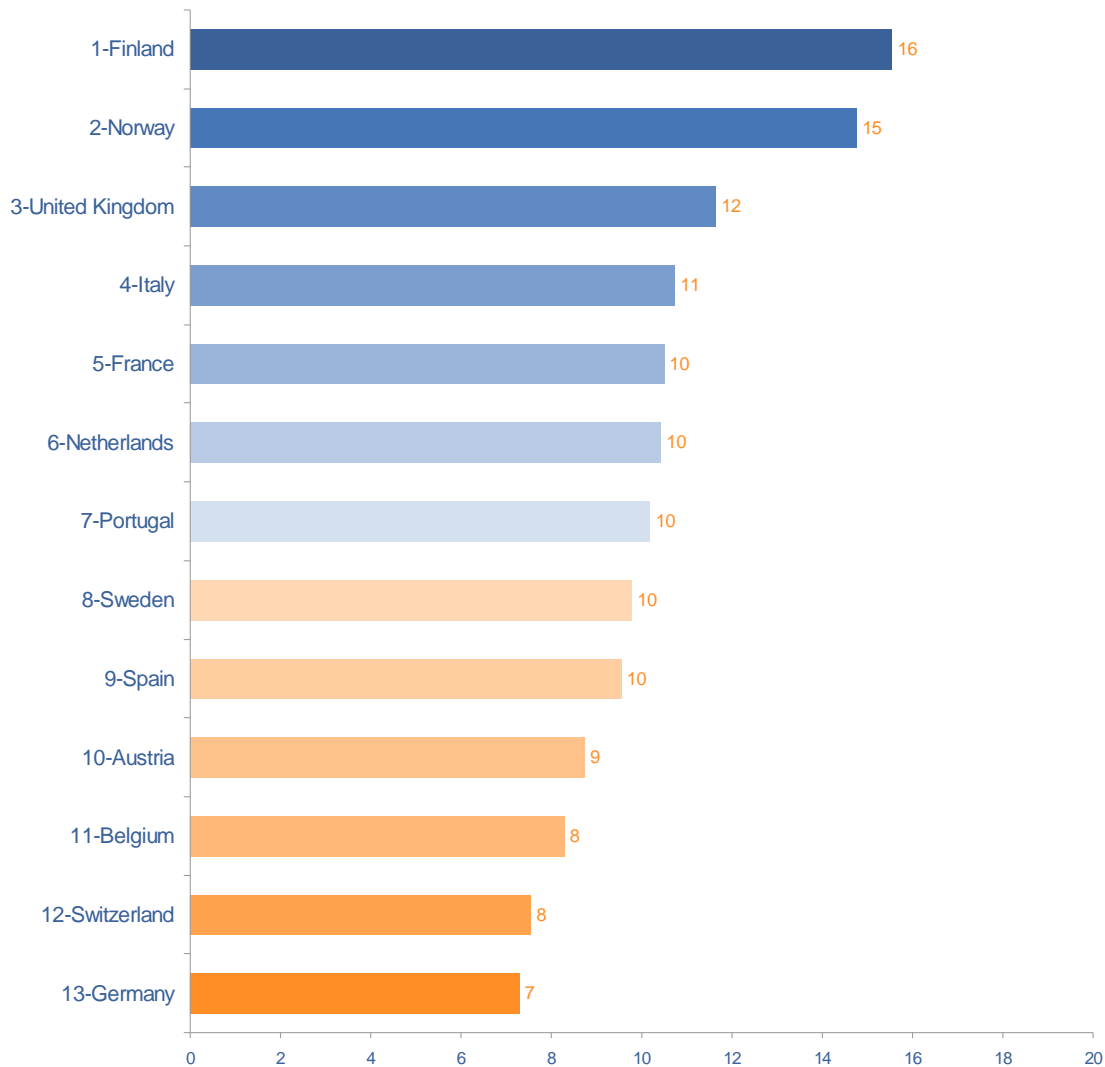
Finland remains first, keeping a strong lead, while Germany is still last. France is now ranked fifth, behind Norway, the United Kingdom and Italy.

The first two countries (Finland and Norway) turned in excellent scores for price and usage indicators, respectively first and second, but paradoxically post mediocre competitive structure indicators (7th and 5th). Both markets lag in terms of macro-economic indicators (10th and 12th).

Boosted by offensive regulation, the United Kingdom is 3rd in terms of competitive structure, but posts an average ranking for the "usage and price" criteria, and is at the end of the pack with Finland and Norway for macro-economic indicators.

Ranked 4th, Italy places well for usage and price criteria, an average ranking for competitive structure and a bad score for the macro-economic indicator.

## HOW EUROPE'S MOBILE MARKETS RANK



### Overall ranking per country

**1st Finland** posts a score of **15,5**, and ranks first for 6 indicators, showcasing its excellent performance

**2nd Norway** with **14,8**, posts 3 first places, including two first places for SMS indicators.

**3rd United Kingdom** with **11,6** shows a major break-off compared to the first two,

and places first for concentration value, reflecting the reality of its deregulated market and ranks second in terms of penetration. The other scores range between 4th and 11th.

**4th Italy** leads the pack with **10,7**, comforting its leadership with a second place in SMS and a third place in SMS consumption.

**5th France** at **10,5** is just a few paces behind and ranks second in terms of outbound calls and 3rd on the basis of calls received. Total traffic total is 4th. This top ranking for volumes is combined with excellent price performance. Criteria which penalized France are penetration rate and concentration levels.

**6th Netherlands** at **10,4** due to three 2nd places but was hampered by five rankings at the back of the pack.

**7th Portugal** at **10,2** is ranked first for the weight of mobiles in the GDP, and continues this ranking with a 2nd place in terms of mobile traffic and two 3rd places for penetration and normative concentration.

**8th Sweden** with a score of **9,8**: and a high GDP in mobile ranking, and while the

country posts high voice consumption, the structural inefficiencies are key.

**9th Spain** at **9,5** with two second place rankings, and twice at the back of the pack.

**10th Austria** at **8,7**, has average macro-economic performances and poor scores for consumption and structural indicators.

**11th Belgium** at **8,3** with very good structural performances, but weak penetration (12th) and a country which underperforms for all indicators.

**12th Switzerland** shows a grade of **7,5** and combines the worst structural performances and prices topping the average.

**13th Germany** has a score of **7,3** pays and underperforms for all indicators. The Germans have continued to consume less and mobile traffic only represents 16% of overall traffic.

## Methodology

To rank these 13 mobile markets, fourteen (14) indicators were analysed and grouped into the following three categories:

### Macro-economic performances

- Weight of the mobile sector in the GDP (N)
- Contribution of the mobile sector in GDP growth between 2001 and 2004 (N)
- Mobile penetration rate (SIM cards) in overall population
- Share of outbound mobile traffic in the country's telecommunications industry

### Usage and price indicators

- Outbound mobile consumption in minutes per SIM card/month
- Inbound mobile consumption in minutes per SIM card/month
- Number of text messages (SMS) per SIM card/month

- Average price of outbound minute (€/min/month)
- Average price of inbound minute (€/min/month)
- Average price of text messages (SMS) in euros/ month
- Average revenue per subscriber (composite) :
- Subscriber composite for average consumption (OECD/European Commission)
- Composite for average European revenue (OMSYC)

**Competitive structure indicators**

- Concentration index for operators' infrastructure (HHI in value)
- Concentration index normalised for operating infrastructure (restated HHI)
- Presence of virtual mobile operators (MVNO) :
  - Number of MVNOs active on the market
  - Weight of the mobile sector in the GDP (N)

**This study and the data used are available and can be purchased directly online or contact : Sara Clignet + 33 (1) 55 04 87 30 or [s.clignet@omsyc.fr](mailto:s.clignet@omsyc.fr)**

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