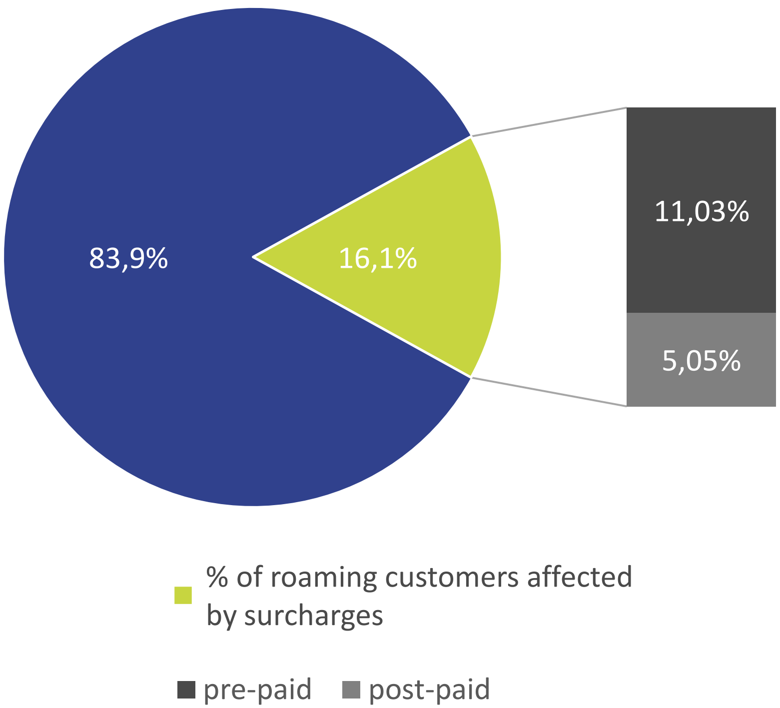
Roam Like At Home
state of play on 31 December, 2019

Warsaw, 15th April 2020

Sustainability surcharges

Request	Decision I	Decision II	Decision III
Virgin Mobile	✓	✓	✓
ITI Neovision	✓	✓	✓
Premium Mobile	✓	✓	✓
FM Group	✓	✓	✓
P4	✓	✓	✗
Mobile Vikings	✓	✓	✓
Polkomtel	✓	✓	✗
Orange	✓	✓	🔍
T-Mobile	✓	✓	🔍
Netia/Dialog	✓	✓	✓
Internetia	✓	✓	✓

Sustainability surcharges

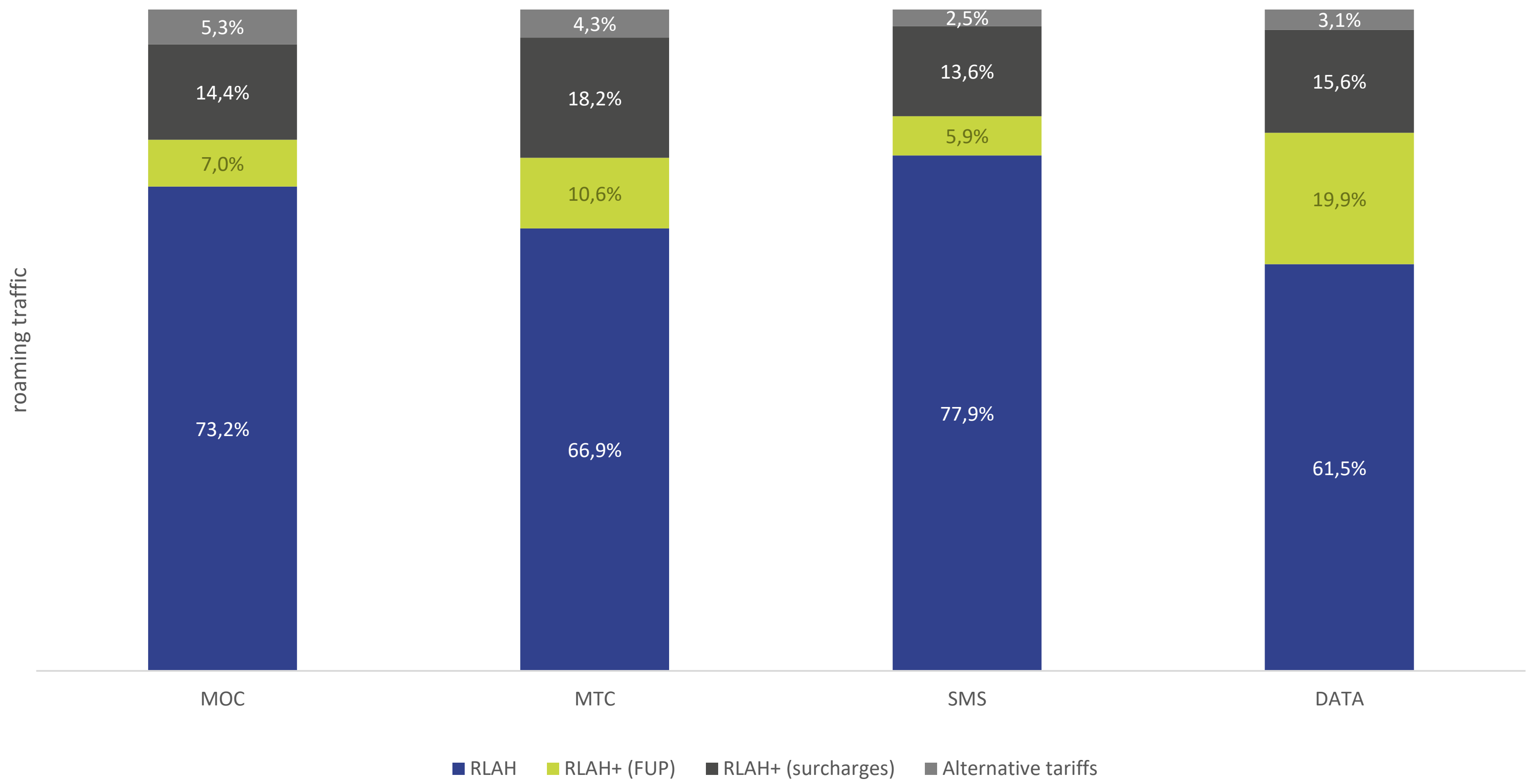


	2018	2019
Total number of subscribers charged by sustainability surcharges	1,8 mn	2,4 mn
Total income from sustainability surcharges [EUR]	7,3 mn	15,9 mn
Average sustainability surcharge [EUR]	**4,02**	**6,76**

Service	Max cap – Decision I	Max cap– Decision II	Max cap– Decision III
MOC [EUR/min]	0,0492	0,0303	0,0303
MTC [EUR/min]	0,0095	0,0090	0,0085
SMS [EUR/pcs.]	0,0170	0,0095	0,0095
DATA [EUR/MB]	0,0076	0,0044	0,0039

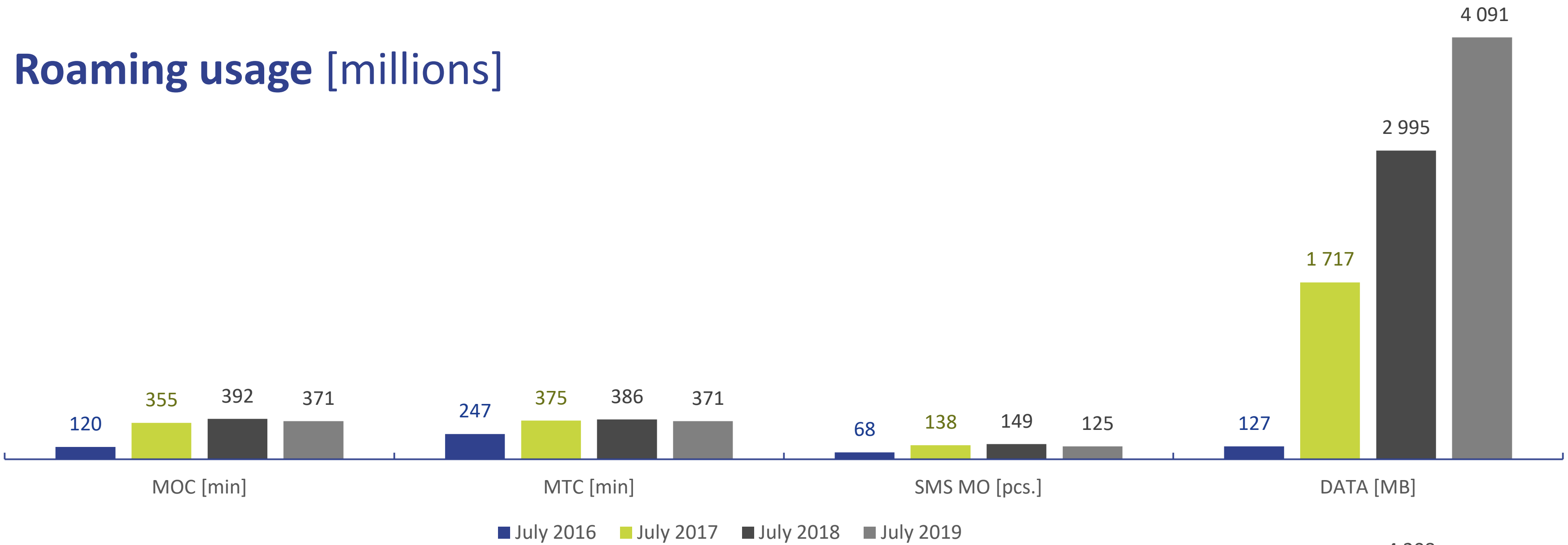
Source: UKE, FY2019

RLAH vs. RLAH+

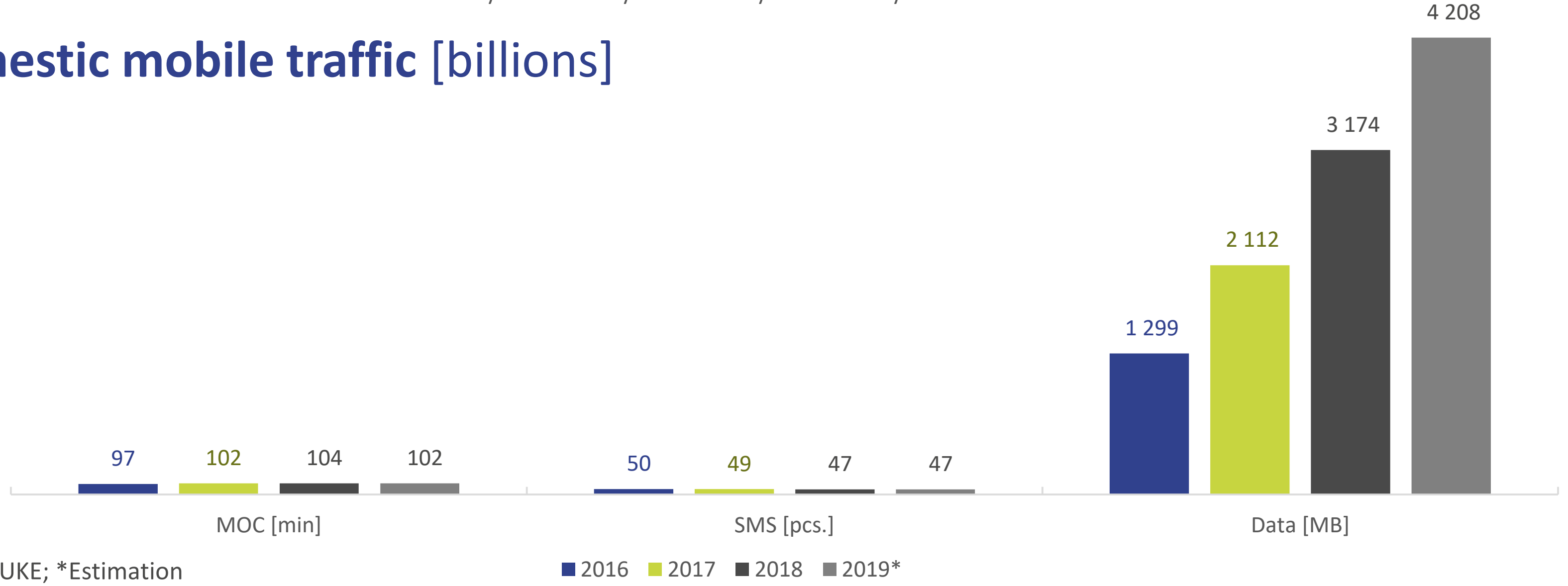


Source: UKE, Q3 2019

Roaming usage [millions]



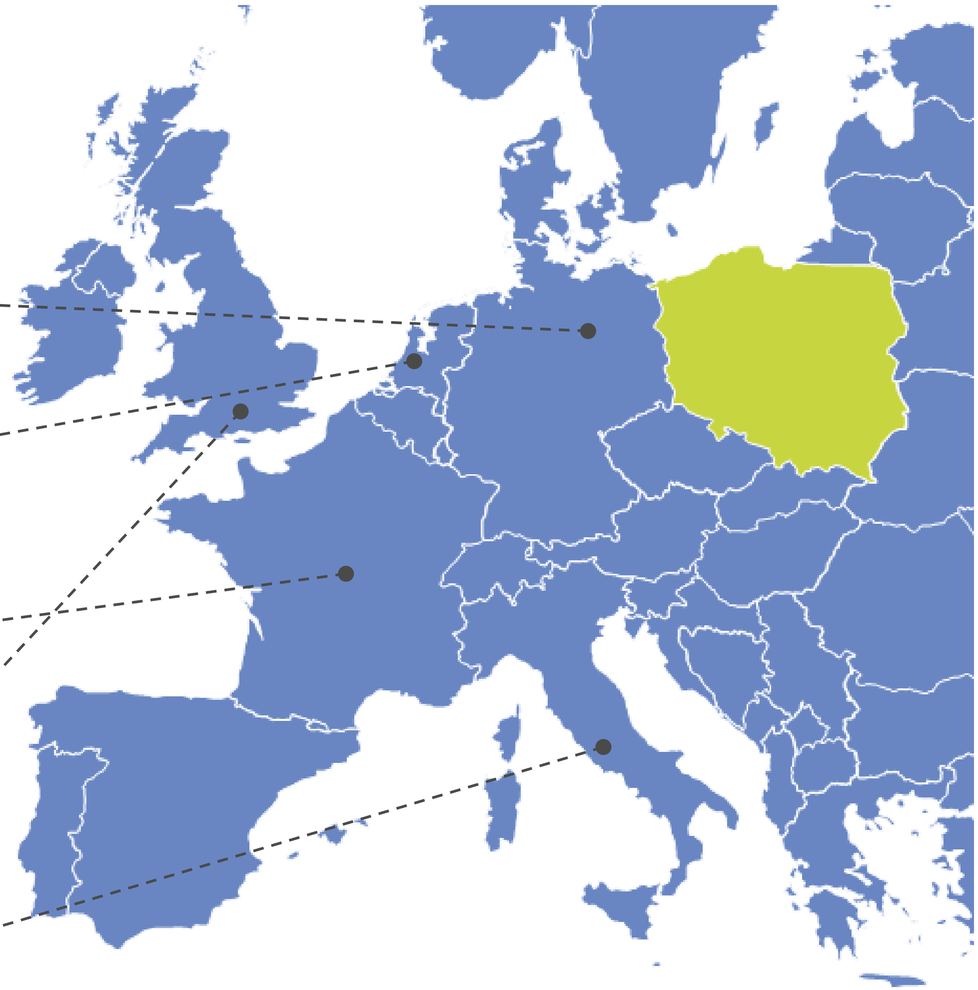
Domestic mobile traffic [billions]



Source: UKE; *Estimation

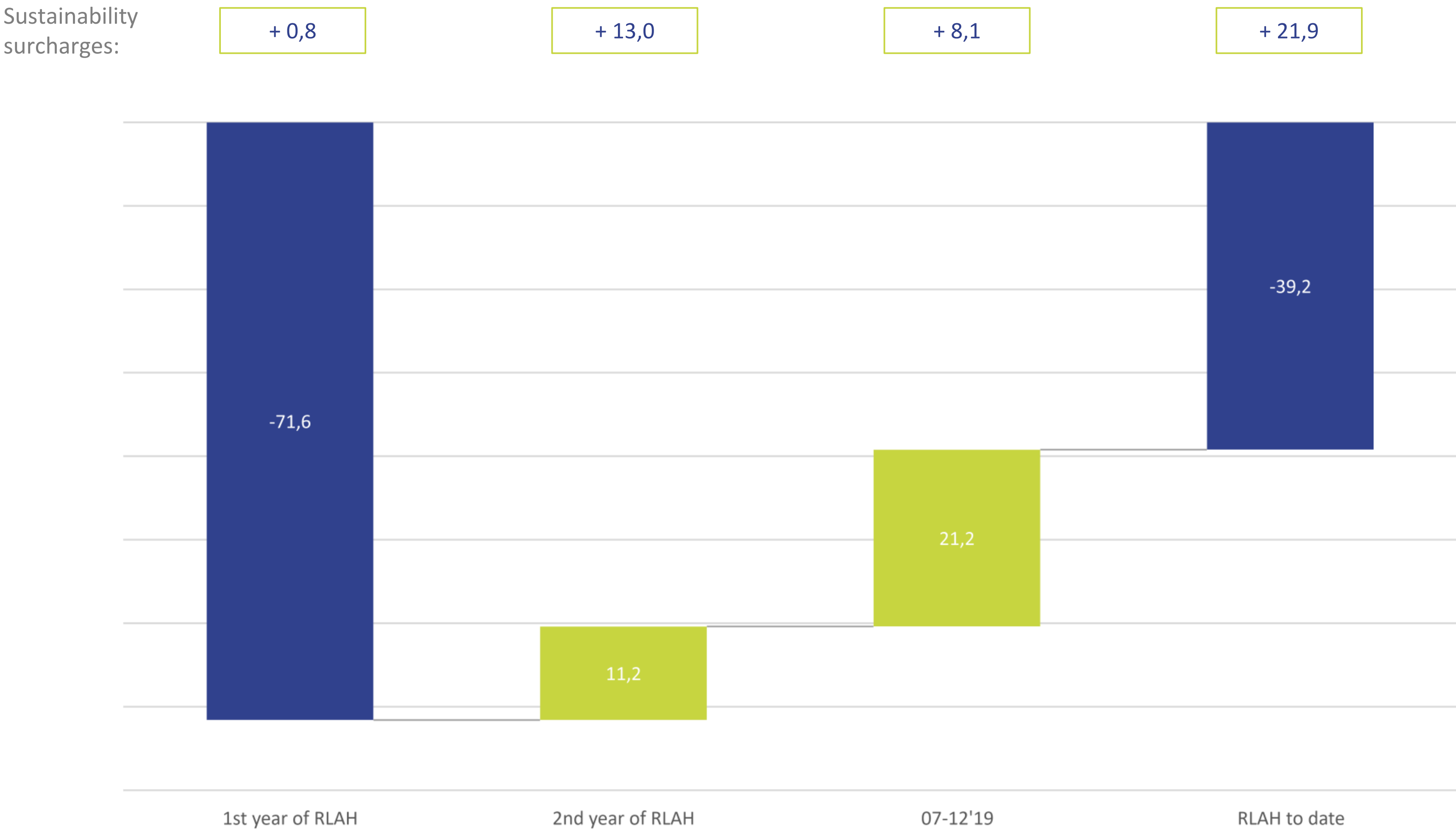
Poles in Europe

	MOC	MTC	SMS MO	DATA
	49%	50%	43%	40%
	7%	7%	10%	8%
	6%	7%	5%	6%
	5%	5%	6%	5%
	4%	4%	4%	6%



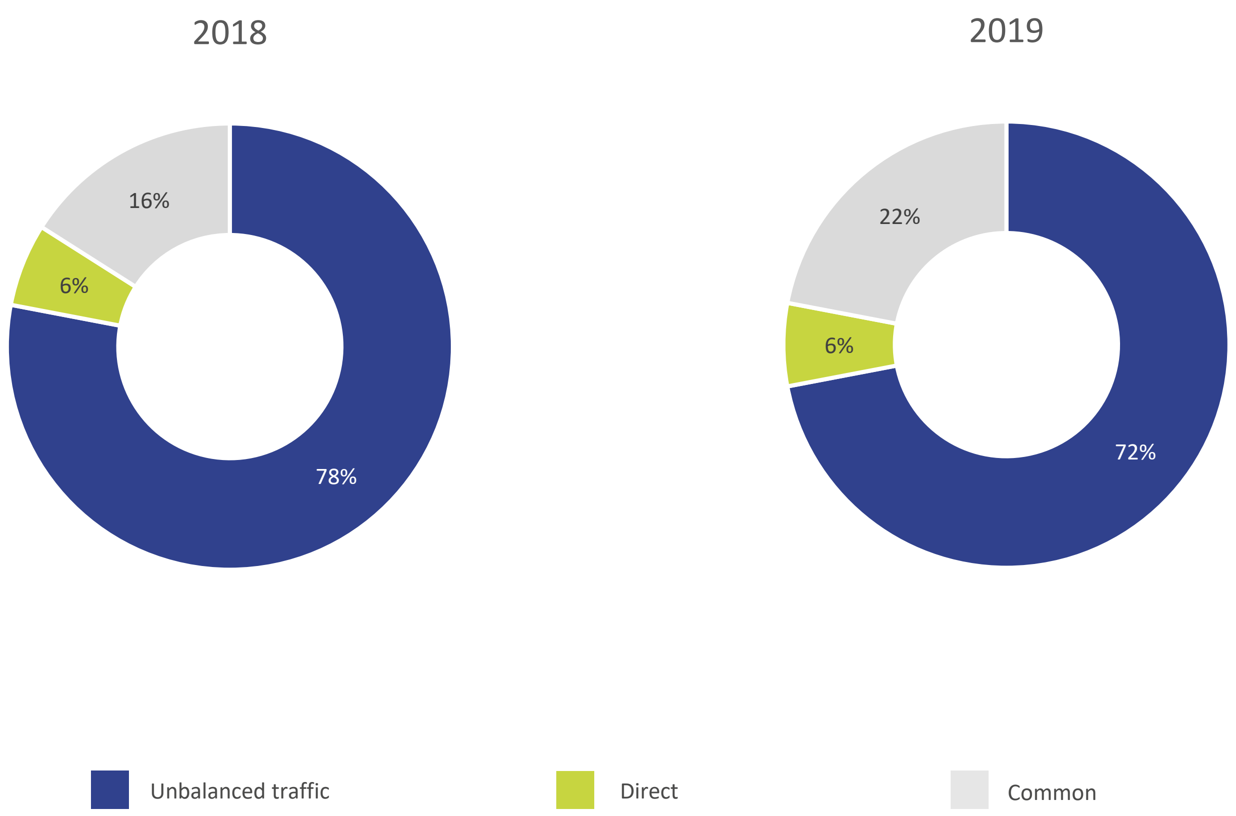
Source: UKE, year 2019

Roaming margin EEA [M EUR]*



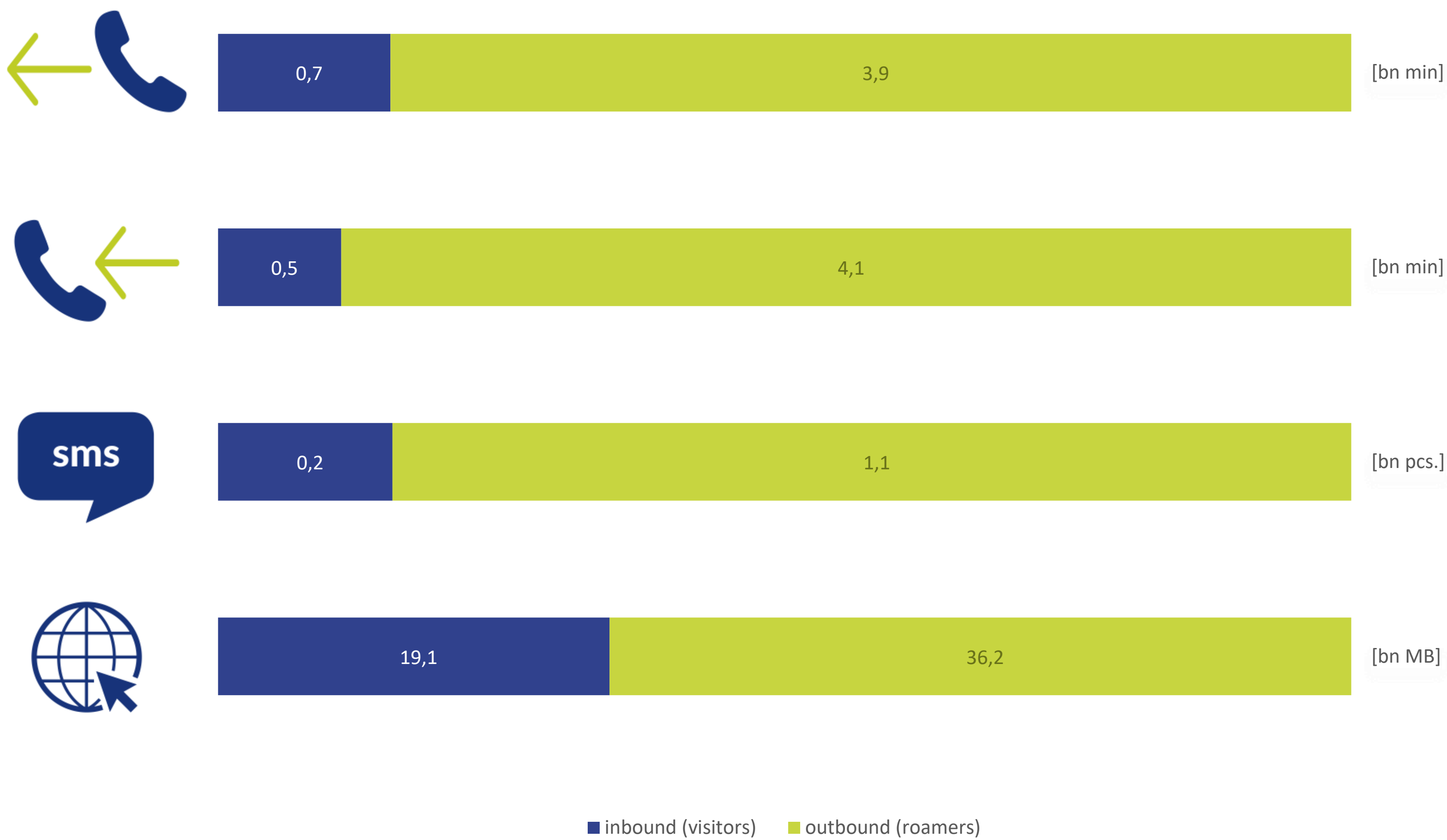
Source: UKE; *MNO

Costs split



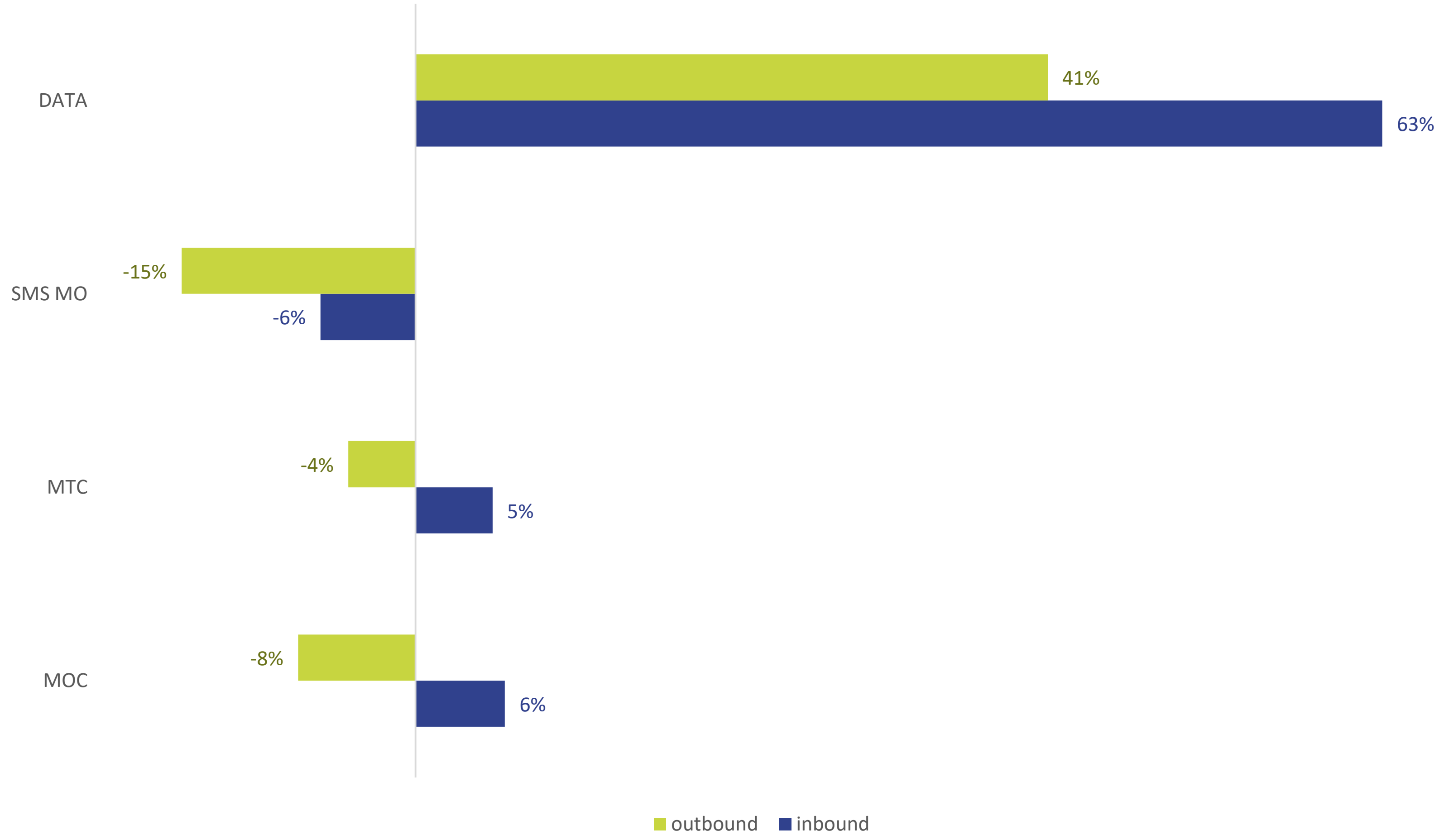
Source: UKE

Traffic balance



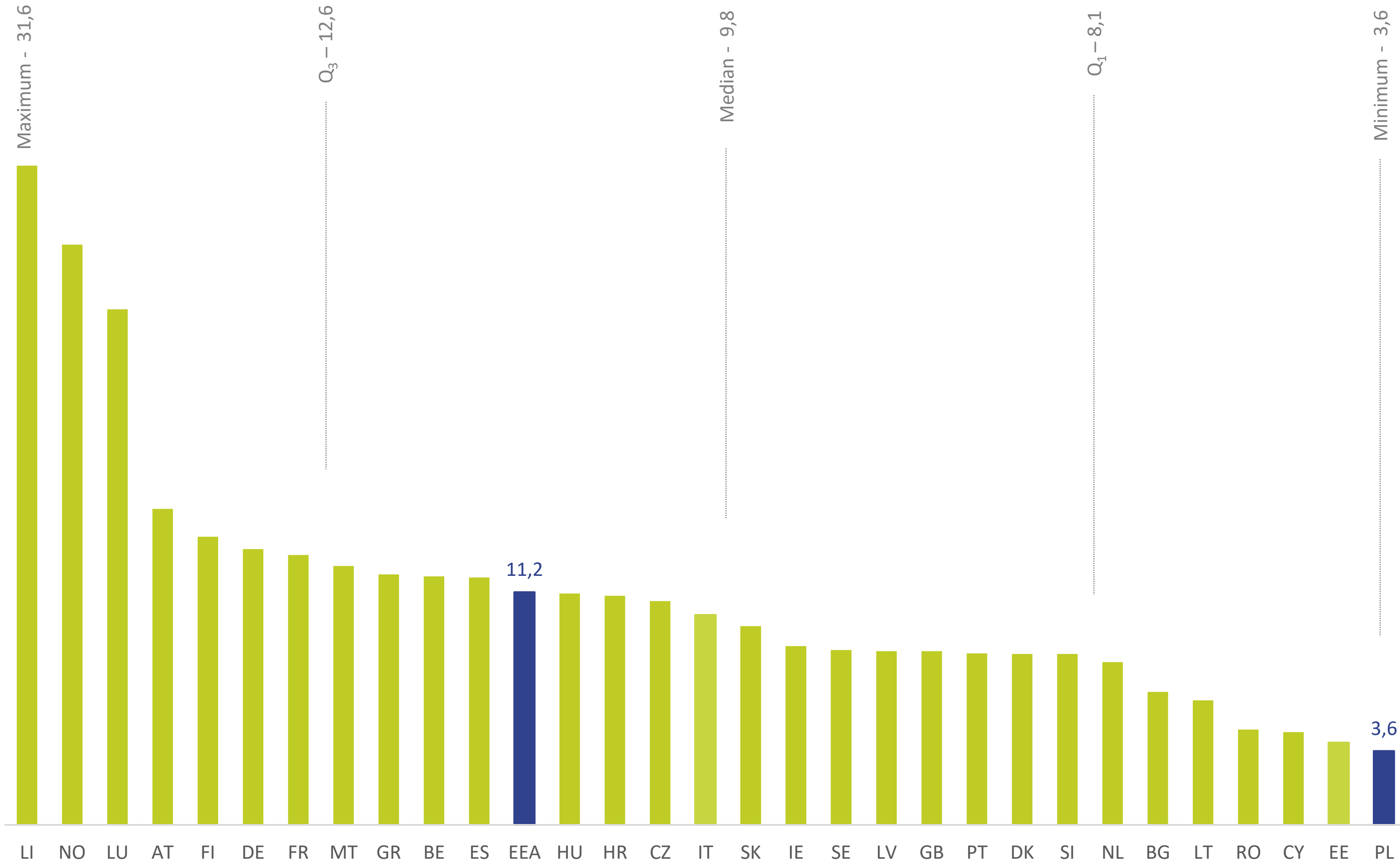
Source: UKE, FY 2019

Traffic dynamics



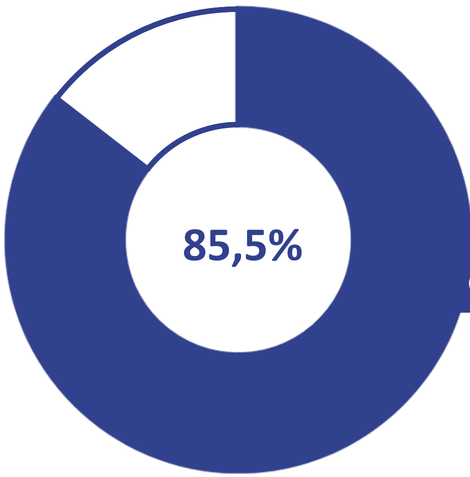
Source: UKE, 2019 vs. 2018

Mobile ARPU [EUR/subscriber/month]



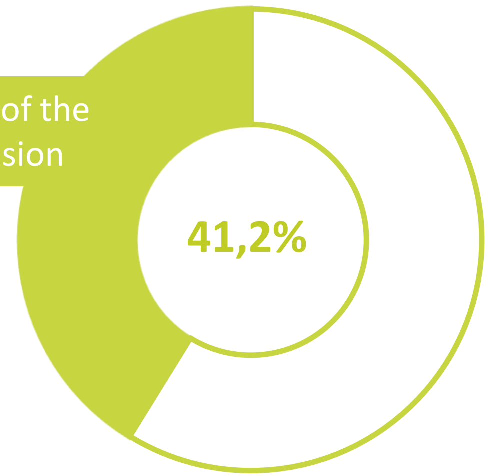
Source: BEREC, Q1 2019

Public perception



of travellers used roaming

of the respondents are aware of the applicability of the RLAH provision



Which telecommunications services did you use in roaming?

85,8% 85,6% 77,3% 32,4% 46,1%

Source: UKE, Report from the survey carried out among private customers 29.11.2019.

Statistics

14,7
mn active cards

+41%
increase DATA consumption

DE
the most often chosen direct

3,6 €*
mobile ARPU PL

the most dynamic service

the most use

16%
subscribers affected by surcharges from decisions

7’2018-12’2019
positive margin MNO

Source: UKE, year 2019; *BEREC Q1 2019

Key findings

1

Surcharges

Compared to the previous year, a larger percentage of roaming users were subject to surcharges (16.1% vs. 12.6%). The share of traffic covered by them also increased similarly, e.g. in the case of data transmission by 9.2pp (15.6% vs. 6.4%). The total revenues of operators in this respect increased from EUR 7.3 million in 2018 to EUR 15.9 million in 2019.
Two of infrastructure operators have not received further decisions authorizing the use of roaming surcharges, and the maximum caps allowed by positive decisions are lower than in the previous cycle. The proceedings regarding the other two decisions are still pending.

2

Use of roaming

The increase in the use of data transmission services in mobile networks remains unchanged – either domestic and in roaming. This trend is observed for Polish users but also for visitors in Poland. The list of main member states in which the roaming traffic is generated does not change.

3

Roaming financial results

The situation of the largest operators on the Polish mobile telephony market has improved since the first year of RLAH - we are seeing a positive margin for roaming services, as well as a decreasing cost of unbalanced traffic, mainly thanks to lower wholesale rates, but also as an effect of the improved over last year balance between volume of data transmission consumed by roaming users and visitors.

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