

Changes in product line-up and price developments – September to December 2021

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Purpose

This presentation outlines the main developments in the product line-up and prices for electronic communications in Malta during the months of September to December 2021:

1. Mobile telephony – launch of 5G plans; changes in product line-up;
2. Bundles – better deals and continued emphasis on service add-ons;
3. Fixed broadband – faster speeds and discounts on monthly access fees;
4. Fixed telephony – price changes when service is purchased in a bundle.

Comparative tables include selected plans - entry-level & high-end - for the different operators.

All rates include VAT, except for business plans.

Operator	Monthly access fee	Data	Mobile data download / upload speed	Voice & SMS	Contract term
GO	€14.99	5GB	Full	No allowances but Unlimited @ an additional €10 p/m	24-Month
Melita	€24.99 - Standard fee down from €40 - Offer for first 12 months increased from €12.99 to €14.99	21GB	4Mbps	Unlimited	24-Month
Epic	€24.99	Unlimited	3Mbps	Unlimited	Month-on-Month

Green - Better deal for the end-user Red - Worse deal for the end-user

Mobile telephony post-paid plans – for the individual end-user

Post-paid Plan	Epic		GO		Melita	
	Basic	Premium	Freedom Plan – 5GB	Freedom Plan - Unlimited GB	Surfer	Racer
Monthly access fee						
24-month agreement	Not applicable		€14.99 (data only)	€24.99 (data only)	€24.99	€34.99
Month-on-month	€24.99	€89.99	€19.99 (data only)	€29.99 (data only)	/	/
Discount	Not applicable	€69.99 p/m access fee w/ family plan	€12.99 with Home Pack	€9.99 (first 6 months) and €19.99 thereafter	€14.99 p/m for the first 12 months	€24.99 p/m for the first 12 months
Data						
Data allowance	Unlimited (throttled speed)	Unlimited	5GB	Unlimited	21GB (throttled speed)	Unlimited
Download speed	3Mbps	5G	5G		4Mbps	5G
Free use of wi-fi	No		No		Yes	
Voice and SMS – optional add-ons						
Calls & SMSs to Malta / EU / UK	Unlimited		Unlimited @ additional €10		Unlimited	
Calls to worldwide numbers	Specific rates may apply	300 minutes	60 mins. & 60 SMSs @ €5		Specific rates may apply	Unlimited to AUS/CAN/CH/USA

Heavy marketing of 5G across the board

- Surfer Plan monthly access fee **decreased** from €40 to €24.99;
- Racer Plan monthly access fee **decreased** from €52 to €34.99.

- Promos:
- Surfer Plan discount **increased** from €12.99 to €14.99;
 - Racer Plan discount **decreased** from €34.99 to €24.99.

Mobile telephony *pre-paid plans – entry-level for individual end-users*

Operator	Monthly access fee	Data	Speed	Voice	SMS	Period
GO	€4.99	250MB	Full	100 Minutes	100	28 days
Melita	€5	250MB	Full	100 Minutes	100	30 days
Epic	€9.99	8GB	Full	200 Minutes	200	28 days

Green - Better deal for the end-user Red - Worse deal for the end-user

No changes in operators' mainstream pre-paid line-up.

Entry-level and top level plans	Epic	GO		Melita	
Pre-paid plan	Value Pack	Smart S	Smart XL	Pass S	Pass L
Monthly access fee	€9.99 per 28 days	€4.99 per 28 days	€34.99 per 28 days	€5 per 30 days	€15 per 30 days
Data allowance	8GB	250Mb	12GB	250Mb	15GB
Data download rates	4.5G	4.5G		4.5G	
Minute allowance	200	100 towards local and EU numbers	Unlimited towards local and EU numbers	100	200
SMS allowance	200			100	200
Carry forward	Not applicable	Not applicable		Not applicable	
Other benefits	Not applicable	250Mb more data when in a bundle	2GB More data when in a bundle	Not applicable	Free wi-fi via network

Note: (i) Operators also allow for the possibility of voice / SMS / data add-ons. Also, not all plans feature in this slide. (ii) All allowances can be consumed in Malta, EU and the UK. Roaming rates apply for outside bundle rates. (iii) The tariffs highlighted in this slide are available as a top-up to the standard pre-paid plans. (iv) Not all plans are being quoted.

Student and Youth Plans	Epic			GO		Melita	
Plan	Youth Basic	Youth Standard	Pay Monthly Plan (new)	Play - DIS	Play Double Dat	Djuno BigGig M	Djuno BigGig L
Type	Manual top-op or online via subscription over pre-paid		Pay Monthly – month to month contract	Top-up over standard pre-paid		Top-up over standard pre-paid	
Monthly access fee	€8.99 (every 28 days)	€12.99 (every 28 days)	€34.99 (limited time offer at €19.99 – until 31 March)	€8.99 (every 28 days)	€12.99 (every 28 days)	€8 (every 30 days)	€12 (every 30 days)
Data allowance	5GB (double data w/ Auto Top-Ups)	20GB (double data w/ Auto Top-Ups)	Unlimited	5GB	20GB	5GB	20GB
Minute allowance	400 to any local number		Unlimited	200 to local, EU and UK numbers + unlimited minutes to 5 numbers with every €10 top-up	300 to local, EU & UK numbers + unlimited minutes to 5 numbers with every 10 top-up	400 to local, EU and UK numbers	
SMS allowance	Unlimited		Unlimited	Unlimited		Unlimited	
Roll-over - unused allowance	Yes		N/A	Yes		No	
Other	Double the data when subscribing to automatic top-up online and not via manual top-up		23GB Data whilst roaming EU & UK	Double the data when part of a Home Pack bundle + music streaming via MusicWildcard + 6 months Sports or Movies and Series TV pass + 12 months Start TV		Free access to wi-fi via operator's network	
Eligibility	Under 29 years of age			Up to 27 years old		Under 29 years of age	

Epic age eligibility up from 25 to 29 years old

Mobile telephony *post-paid plans – entry-level for businesses*

Operator	Monthly access fee	Data	Download / upload speed	Voice + SMS	Contract term
GO	€10	5GB	Full	No allowances but unlimited at and additional €15 p/m	24 Months
Melita	€27.99	Unlimited	Full	Unlimited	24 Months
Epic	€29.99 Down from €34.99 in August 2021	10GB	Full	Unlimited	24 Months

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Mobile telephony post-paid plans – entry-level for businesses

Business post-paid plans	Epic		GO		Melita	
	Business Essential	Business Premium	Infinity 5	Infinity Unlimited	Business 5G	Business 5G Max
Monthly access fee						
No contract	-	-	€15	€25	-	-
2-year contract	€29.99	€59.99	€10	€15	€27.99	€34.99
1-year contract	€34.23	€76.94	-	-	-	-
	Data, voice and SMS allowances					
local / EU / UK	10GB	unlimited	5GB	unlimited	unlimited	unlimited
Outside EU / UK	-	3GB	-	-	-	-
Voice & SMS allowance	Unlimited to local / EU / UK numbers + 200 international minutes		<u>Pay-per-use rates</u>		Unlimited from Malta and to EU & UK when roaming in EU & UK	
Other						
Roaming	Allowances available in Malta, EU and UK. Outside bundle 'Pay per use' rates apply once allowance is consumed.		Allowances available in Malta, EU and UK + 50% on non-EU roaming. Outside bundle 'Pay per use' rates apply once allowance is consumed.		unlimited Melita WiFi	
Optional add-ons – voice & SMS	Add-on minutes: 100 minutes / 300 minutes from Malta to international numbers @ €10 per month / €25 per month <u>AND / OR</u> 5GB / 10GB @ €15 / €25 per month respectively		Infinity Voice @ €15 per month: (i) unlimited calls & SMSs to local, EU and UK numbers; (ii) 200 minutes and 200 SMSs to worldwide numbers		50 international call minutes & 50 SMSs to a specified set of countries at an additional €5 per month	
Launch date	November 2020		April 2021		May 2021	

Epic
Monthly access fees decreased by €5 for Essential plan and by €20 for Premium plan

Bundle offerings are today mainstream, with local service providers implementing various strategies to upsell these products.

1. Most popular bundles feature fixed broadband, fixed telephony and pay TV.
2. No changes on the fixed telephony or pay TV front but operators are making forays into faster speeds (1000mbps+) and making their faster broadband packages more competitive w/ offers.

Triple-play for households – entry-level

Melita and GO offer triple play offers that feature TV.

GO – Mix & Match		
Entry-level quoted prices for 24-month contract		
<p>Internet + Fixed telephony line</p> <p>Starting with ‘Turbo’ plan 100Mbps download speed @ €25</p>	<p>Optional: Add TV screens @ €5 for each AND</p> <p>Add TV passes @ €5.99 for each</p>	<p>Optional: Add Unlimited local calls @ €3.99</p> <p>AND / OR</p> <p>Unlimited international calls @ €7.99</p>
<p>October 2021 - New Offer for Giga plan: €19.99 for the first 12 months of 24 month contract (€39.99 thereafter). *GO’s Giga plan is only available in fibre areas.</p>		

Melita - Flexi		
Entry-level quoted prices for 24-month contract		
<p>Internet</p> <p>Starting with ‘Internet Fibre Power’ plan with 300Mbps download speed @ €32.99</p>	<p>Incl. ‘TV Starter NexTV’</p> <p>‘TV NexTV’ @ €19.99 (first 12 months) and 39.99 (after 12 months)</p>	<p>Incl. Telephony fixed line (Call to local fixed numbers at €0.05 and all mobile numbers at €0.23)</p> <p><u>OR</u></p> <p>change to ‘Telephony Fixed unlimited @ €7</p>
<p>November 2021: Increased entry-level speed from 250 mbps to 300 mbps.</p>		

Clients to GO and Melita can also opt for a number of TV add-ons with their bundles, such as those featuring sports and movie channels.

Dual-play for households – entry-level

Operator	Monthly access fee	Download Speed	Upload Speed	Voice Allowance	Contract term
GO	€25	100Mbps	15Mbps	Not applicable	24 Months
Melita	€25	150Mbps Up from 100Mbps since August 2021	15Mbps	Unlimited fixed local	24 Months
Epic	€24.99	100Mbps	15Mbps	Unlimited fixed local	24 Months

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Dual-play for households – entry level

Broadband + Fixed Telephony

Entry-level dual-play plans	Epic	GO	Melita
Plan	100Mbps / 15Mbps	Home Pack – ‘Turbo’	Internet Fibre Power 150Mbps
Monthly access fee			
Month-on-month	No longer avail.	€30	€35
24-month contract	€24.99	€25	€25
Fixed broadband			
Download speed	100Mbps	100Mbps	150Mbps
Upload speed	15Mbps	15Mbps	15Mbps
Fixed telephony			
Voice allowance	Unlimited fixed local calls & Epic numbers	-	Unlimited fixed local calls
Other calls	Calls to local mobile numbers @ €0.23	€0.05c for local fixed calls and €0.22c for local mobile calls.	Calls to local mobile numbers @ €0.23 per minute
Optional add-ons	Standard rates example for UK and EU @ €0.22 for mobile calls and €0.038 for fixed calls	Unlimited local calls @ €3.99 AND/OR Unlimited international calls @ €7.99	Fixed telephony 100 minutes to EU / Australia / Canada / China / USA @ €3 OR 500 minutes @ €10
Additional plan features and temporary offers	First 6 months free with Mobile Pay Monthly Plans	Download / upload speed can increase.	20GB Melita wi-fi

Epic changed Fibre300 -> Fibre500 with no increase in price.

Go reduced price of Turbo plan for month-on-month contract by €5.

Melita changed 100mbps plan -> 150 mbps.

Bundles
Dual-play for businesses – entry-level

Operator	Monthly Price	Download Speed	Upload Speed	Voice Allowance	Contract term
GO	€35	100Mbps (up from 35Mbps in August 2021)	15Mbps	Unlimited to GO fixed	24 Months
Melita	€33.90 Down from €43.90 in August 2021	250Mbps	15Mbps	Unlimited to Melita fixed + mobile	24 Months
Epic	€41 Up from €30 in August 2021	100Mbps	15Mbps	Unlimited to Epic fixed + mobile	24 Months

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Bundles

Dual-play for businesses – entry-level

Entry-level dual-play plans	Epic	GO	Melita
Plan	100Mbps / 15Mbps	Business Internet- small	Business Flexi Duo
Month-on-month access fee	Not applicable	Not applicable	Not applicable
24-month contract access fee	€41	€35.00	€33.90
Download speed	100Mbps	100Mbps	250Mbps
Upload speed	15Mbps	15Mbps	15Mbps
Voice allowance	Unlimited local calls to Epic numbers	Unlimited calls to GO fixed numbers	Unlimited local calls to Melita numbers
Other calls	Calls to local mobile numbers @ €0.23	€0.05c for local fixed calls and €0.19c for local mobile calls.	Calls to local mobile numbers @ €0.23 per minute
Other	First 6 months free with Business Mobile Pay Monthly Plans	Not applicable	10GB Melita wi-fi

Epic raised prices from €30 to €41.

GO increased minimum speed from 35 to 100mbps (same price).

Melita decreased access fee by €10.

Melita and GO also offer triple play plans that feature TV to business clients.

GO – Business Infinity		
<i>Quoted prices for 24-month contract</i>		
Internet + Fixed telephony line Starting with 'Medium' plan 500Mbps download speed @ €50	Incl. TV + Sports 1 Gold TV + a GO Sports Stream Add GO Stars stream @ €2 for each stream	Incl. unlimited local fixed calls Optional: Add local mobile calls @ €8.50
- Note: Plan is only available in fibre areas and subject to a 2-year contract term agreement.		

Melita – Business Flexi		
<i>Quoted prices for 24-month contract</i>		
Internet Starting with 'Business Internet 250x15Mbps' plan with 250Mbps download speed @ €32.99	Incl. 'TV Starter NexTV' Optional: Change to 'TV NexTV L HD' @ €5 <u>OR</u> Change to 'TV NexTV XL HD' @ €15	Incl. Telephony fixed line 'Melita Fixed and Mobile' Optional: change to 'Fixed and Mobile Unlimited' @ €10
- Note: plan is subject to a 2-year contract term agreement.		

Clients to GO and Melita can also opt for a number of TV add-ons with their bundles, such as those featuring sports and movie / entertainment channels.

Other changes to fixed broadband, mobile telephony and fixed telephony segments:

Fixed broadband and bundles

- September 2021: GO discontinued legacy plans with speeds of up to 15Mbps/1Mbps and those on 4Mbps/512Kb.
- October 2021: Melita upgrades 250Mbps internet speed to 500Mbps and introduces new security features at €1.00/month extra fee.
- November 2021: Epic upgrades the Home Internet fibre 300 at 300Mbps for free to Home Internet Fibre 500 at 500Mbps. Upload speed was upgraded from 30Mbps to 50Mbps respectively.
- Most plans are offered in a bundle, with just a few purely stand-alone plans. In this area, no changes were recorded.

Fixed Telephony

- November 2021: GO voice add-ons providing 'Unlimited Local Landline Calls' at €3 monthly and 'Unlimited Local Mobile calls' at €5 monthly replaced with a new add-on which includes 'Unlimited Local calls to all Landline and Mobile numbers' for €3.99 monthly.
- November 2021: Melita terminating some of its business tailor-made fixed telephony contracts. Subscribers informed accordingly.
- November 2021: Melita's Fixed Line and Mobile Unlimited bundle decreased from €37.99 to €24.99.

Mobile telephony

- October 2021: Epic introduces its new International Premium Rate Service and roaming service charges. Notifications were sent to impacted subscribers.
- November 2021: Epic and Melita ran Black Friday offers with lower monthly access fees for a limited time.



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