



Changes in product line-up and price developments – January to April 2021

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

1. Mobile telephony – Big changes in the product line-up;
2. Bundles – Bigger emphasis on add-ons and new discount offers;
3. Fixed broadband – The prospect of more choice;
4. Pay TV and fixed telephony – A shift towards Android-based TV and add-ons to bundles.

Comparative tables with selected plans for the different operators are provided. All rates are quoted including VAT unless stated otherwise.

The changes for the mobile telephony segment largely materialized in the context of one operator rebranding its product line-up.

1. Product line-up almost completely revamped, with few plans from 2020 visible on the radar.
2. Unlimited data allowances moving mainstream, particularly for the post-paid element. Positive developments in this area also observed for pre-paid.
3. A general improvement also observed for voice and SMS allowances.
4. New approach by one operator to stop binding clients with 24-month contract agreements may spur further changes over the coming months.

Mobile telephony post-paid plans

Mobile data is the selling factor for most of the plans on offer, with the different operators implementing their own ways to emphasize why there plans offer more in this area. Data allowances improved since January 2021.

Entry-level plans	Epic		GO		Melita	
Post-paid Plan	Basic	Standard	Freedom Plan – 5GB	Freedom Plan - Unlimited GB	Surfer	Racer
Monthly access fee						
24-month agreement	Not applicable		€14.99	€24.99	€24.99	€34.99
Month-on-month	€24.99	€34.99	€19.99	€29.99	€34.99	€49.99
Bundle discount	Not applicable	Yes, €5 with Family Pack Plan	Yes. €2 with Home Pack	Yes, €5 with Home Pack	Not applicable	Yes, €10 with Flexi plan
Data						
Data allowance	14GB	23GB	5GB	Unlimited	Unlimited	
Download speed	3Mbps	4.5G	4.5G		3Mbps	200Mbps
Free use of wi-fi	No		No		Yes	
Voice and SMS						
Calls & SMSs to Malta / EU / UK	Unlimited		Unlimited @ additional €10		Unlimited towards Australia, Canada, China, US	
International minutes	Specific rates may apply		60 mins. & 60 SMSs @ €5		Specific rates may apply	Unlimited
Launch date of new tariff	November 2020		March 2021		December 2020	

Epic - November 2020 change
New plans with lower entry-level access fees (€30 to €24.99) and improved data allowance (12GB to unlimited)

Melita - December 2020 change
Lower access fee – by €5 - on Surfer subscription with Flexi Bundle.

GO - March 2021 change
Lower monthly access fees – ranging between €10 to €30 – for plans on contract and stand-alone.

Note: For all operators, other charges may apply over and above monthly access fees, such as fees for printed bills; non-Direct Debit fees etc. This practice is universal across most products on offer, not just in case of post-paid mobile telephony plans.

Mobile telephony pre-paid plans

Operators have also updated their pre-paid line-up, generally resulting in healthier price competition and more value in terms of data, voice and SMS allowances.

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	€4.99	€34.99	€5	€15
Data allowance	8GB	250Mb	12GB	250Mb	15GB
Data download rates	4.5G	4.5G		4.5G	
Minute allowance	200 towards local numbers	100 towards local and EU numbers	Unlimited towards local and EU numbers	100 towards local and EU numbers	200 towards local and EU numbers
SMS allowance					
Carry forward	Not applicable	Not applicable		Not applicable	
Some other benefits	Switchers to Epic avail from a €4.99 access fee (first 6 purchases)	250Mb more data when in a bundle + switchers to GO upgraded to Smart L	2GB More data when in a bundle + Music WildCard + switchers to GO upgraded to Smart L	Not applicable	Free wi-fi via network
Launch date of new tariff	January 2021	March 2021, under Pay as You Go		March 2021, under Pockit Top-Up offer	

Epic – January 2021 change

New plan at a price that earlier afforded a mobile data allowance of 2GB or for the respective client segment.

Melita - March 2021 change

New line-up sees one more plan and data allowance more than double. For example, top-end now @ €15 incl. 15GB compared to €15 incl. 4GB.

GO - March 2021 change

New line-up sees data allowances double from those prevailing at the beginning of the year.

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.

Youth and student plans are typically updated in Q3 / Q4 of the year. There have been some positive changes since last November, mainly as allowances improved to varying extents particularly in the case of voice and SMS.

Student and Youth Plans	Epic		GO		Melita	
Plan	Youth Basic	Youth Standard	Play - DIS	Play - Double Dat	Djuno - BigGig M	Djuno - BigGig L
Type	Manual top-op or online via subscription over pre-paid		Top-up over standard pre-paid		Top-up over standard pre-paid	
Monthly access fee	€8.99	€12.99	€8.99	€12.99	€8	€12
Data allowance	5GB	20GB	5GB	20GB	5GB	20GB
Minute allowance	400 to any local number		200 to local, EU and UK numbers + unlimited minutes to 5 numbers with every €10 top-up		400 to local, EU and UK numbers	
SMS allowance	Unlimited		Unlimited		Unlimited	
Roll-over of unused allowance units	Yes		Yes		No	
Other	Double the data when subscribing to automatic top-up online and not via manual top-up		Double the data when part of a Home Pack bundle + music streaming via MusicWildcard		Free access to wi-fi via operator's network	
Eligibility	Under 25 years of age		Up to 27 years old		Under 29 years of age	
Validity per top-up	28 days		30 days		30 days	
Launch date	November 2020		October 2020		November 2020	

All allowances can generally be consumed in Malta, EU and the UK. Roaming rates apply for outside bundle rates.

Epic Q4 2020 change
New online top-up offer giving chance client to get double data allowance.

Plans have been launched some months ago but updated this year in terms of data / voice allowances.

Melita's voice and SMS allowances were previously 100 units each.

Mobile telephony Business plans

Emphasis for business clients is on post-paid plans, with data taking centre stage in the observed pricing dynamics.

Business post-paid plans	Epic			GO		Melita	
	Business Essential	Business Pro	Business Premium	Infinity 5	Infinity Unlimited	Business Stars	Business Stars Plus
Monthly access fee							
No contract	-	-	-	€17.70	€29.50	-	-
2-year contract	€35.39	€47.19	€70.79	€12.70	€19.50	€45	€60
1-year contract	€40.39	€57.19	€90.79	-	-	-	-
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			Pay-per-use rates apply		Pay-per-use rates apply	Unlimited to local numbers
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. Outside bundle 'Pay per use' rates apply once allowance is consumed.		50GB Melita wi-fi	
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		Add-on international minutes and SMSs, starting from 100 minutes and 100 SMSs @ €5	
Launch date	November 2020			April 2021		July 2019	

Epic – November 2020 change

Entry-level plan with lower access fees for 24-month contract (€43 to €35.39) + 10GB data compared to 4GB. Other positive changes for plans in line-up.

GO - April 2021 change

Unlimited data now @ €29.50 per month compared to €59.00 a year earlier.

Note: For comparative reasons, Melita's plans are only quoted on the unlimited allowance option. Monthly access fees change depending on the data cap chosen by the client. Apart from the emphasis on mobile data local operators also focus on selling handsets with their plans to end-users.

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. Product line-up for Melita and GO remains largely unchanged to that prevailing at the end of 2020. But several temporary offers on bundle purchases have been introduced.
3. Epic is consolidating market presence via localized network deployment and the commercial launch of new dual-play offers based on FTTH, featuring Internet and fixed telephony.
4. Various offers did materialise over the first months of 2021 by way of, for example, downward price adjustments in the top-end of the product line-up and other temporary offers.

Bundles

Triple-play for households

Melita and GO offer triple play offers that feature TV, with several temporary offers as indicated below.

GO – Mix & Match		
<i>Quoted prices for 24-month contract</i>		
<p>Internet + Fixed telephony line</p> <p>Starting with ‘Turbo’ plan 100Mbps download speed @ €30</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><u>Offers introduced in 2021</u></p> <ul style="list-style-type: none"> - Lower monthly access fee for 1Gbps Giga plan (€55 to €39) - Double upload speed for ‘Turbo’ and ‘Super’ plans @ €1.99 per month. First 3 months of subscriptions free. - Unlimited calls to local numbers for first three months of subscription. - Addition of third screen for free. - Easy Buy TV Offer becomes applicable to bundles. 		

Melita - Flexi		
<i>Quoted prices for 24-month contract</i>		
<p>Internet</p> <p>Starting with ‘Internet Fibre Power’ plan with 250Mbps download speed @ €32.99</p>	<p>Incl. ‘TV Starter NexTV’</p> <p>Change to ‘TV NexTV L HD’ @ €6</p> <p><u>OR</u> Change to ‘TV NexTV XL HD’ @ €10.99</p>	<p>Incl. Telephony fixed line</p> <p>Change to ‘Telephony Fixed Unlimited’ @ €3</p> <p><u>OR</u></p> <p>change to ‘Telephony Fixed and Mobile Unlimited’ @ €8</p>
<p><u>Offers introduced in 2021</u></p> <ul style="list-style-type: none"> - Allow clients to choose the NexTV Android TV App by itself, or with the NexTV Box. 		

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.

Note: Download speeds of 100Mbps or more offered by GO and Epic are only available in areas served by fiber network infrastructure.

Bundles

Dual-play for households

Epic started FTTH deployment and has commercially launched its dual play offers.

Entry-level dual-play plans	Epic	GO	Melita
Plan	100Mbps / 15Mbps	Home Pack – ‘Turbo’	Internet Fibre Power 100Mbps
Monthly access fee			
Month-on-month	€24.99 + one-time fee of €49.99	€30	€35
24-month contract	€24.99	€25	€25
Fixed broadband			
Download speed	100Mbps	100Mbps	100Mbps
Upload speed	15Mbps	15Mbps	6Mbps
Fixed telephony			
Voice allowance	Unlimited local calls	-	Unlimited 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	Double upload speed to 30Mbps @ €1.99 per month. First three months of subscription free 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

Download speeds higher than 100Mbps are available for GO and Epic in a dual play offer.

GO offers 300Mbps/30Mbps and 1000Mbps/60Mbps.

Epic offers 300Mbps/30Mbps and 1000Mbps/60Mbps and 2000Mbps. Epic's upload speeds for the 300Mbps and the 1000Mbps products improved from 20Mbps and 30Mbps respectively.

Epic commercially launched the 2000Mbps plan in April 2021. Available at Mosta, starting from €24.99 per month.
No change for entry-level 100Mbps plan but rebranded.

Note: Download speeds of 100Mbps or more offered by GO and Epic are only available in areas served by fiber network infrastructure.

Bundles Dual-play for Businesses

Not much has changed in the dual-play line-up for businesses, although Epic’s commercial launch of 2000 Mbps raises the prospect for a more competitive environment even for the business segment.

Entry-level dual-play plans	Epic	GO		Melita
Plan	100Mbps / 15Mbps	Business Internet	Business Infintiy Pack - Small	Business Flexi Duo
Month-on-month access fee	-	€70.00	€30	€35
24-month contract access fee	€41.28	€35.00	€41.30	€50
Download speed	100Mbps	35Mbps	100Mbps	250Mbps
Upload speed	15Mbps	5Mbps	15Mbps	15Mbps
Voice allowance	Unlimited local calls to Epic numbers	Unlimited calls to GO fixed numbers	Unlimited calls to all 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.	€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	-	Download / upload speed can increase.	10GB Melita wi-fi

Higher speeds are available for GO and Epic in other bundle offers.

GO triple play offers 500Mbps/50Mbps and 1000Mbps/100Mbps.

Epic dual play offers 500Mbps/50Mbps and 1000Mbps/100Mbps and 2000Mbps.

Note: Download speeds of 100Mbps or more offered by GO and Epic are only available in areas served by fiber network infrastructure.

Melita and GO offer triple play offers 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
<u>Notes on new offers / upgrades</u> <ul style="list-style-type: none"> - Lower monthly access fee for 1Gbps plan (€177 to €147.5). - Other internet speeds: 1Gbps/100Mbps; 1Gbps/500Mbps. 		

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
<u>Note on new offers / upgrades</u> <ul style="list-style-type: none"> - Other internet speeds: 500Mbps/20Mbps; 1Gbps/500Mbps. - Product line-up and pricing has not changed significantly over the past 12 months. Some changes were however implemented in the TV element when it comes to optional add-ons. 		

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.

Note: Download speeds of 100Mbps or more offered by GO and Epic are only available in areas served by fiber network infrastructure.

Other changes to fixed broadband, pay TV and fixed telephony segments are referred to below:

Fixed broadband

- Most plans are offered in a bundle, with just a few proper stand-alone plans. In this area, no changes were recorded.
- GO is in the process of terminating its legacy 20Mbps download internet plan. Impacted subscribers who are currently not bound with a contract will be migrated to a different tariff without being bound to any contractual duration.

Pay TV

- GO is in the process of switching off the Digital Terrestrial TV (DTTV) service.
- GO notified customers that from the 1st April 2021, GO Sports, GO Stars and Gold DTTV plans will no longer be available to GO DTTV subscribers.
- The shift to online and Android-based TV has accelerated. Clients of GO and Melita now have the option to register different devices over which to watch TV channels offered on their respective plan. The choice for clients is between set-top boxes and these online / Android solutions, whilst in some cases both options are being offered to the end-user.

Fixed telephony

- GO has given notification that it will be terminating the Easyline service on the 1st of June 2021.
- GO is in the process of phasing out products and plans that are offered over legacy technologies like ISDN and shift impacted clients to Voice over Internet Protocol (VoIP) technologies.



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