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2023 Telecoms Retail Pricing Market Study



Communications
Commission

Report overview	3
Methodology and baskets	4
Summary of findings	10
Mobile voice and data results	22
Mobile data only results	35
Fixed broadband results	47
Bundled communication services results	61

Table of contents

Report overview

The Georgian National Communications Commission (COMCOM) has commissioned Teligon (TechInsights) to support its market study of Telecoms Retail Pricing, comparing the cost of communications services in Georgia against selected EU markets, plus the UK. This report presents the results of the study.

The report considers the cost of mobile and fixed broadband telecommunications services, plus bundled communications services in Georgia, compared to selected European countries, for both residential (consumer) and small business users. The countries considered are:

- Georgia, selected EU (Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden,) and the UK.
 - As the study is focused on Europe, specifically European Union countries, but drawing from OECD price benchmarking studies, the EU countries that are also part of the OECD have been considered. The UK has also been included as due to the competitive nature of pricing in the UK, it is often included as a comparator, alongside EU countries.

The study adopts a basket-based approach using internationally recognized baskets of the OECD (standalone and bundled services). The official price benchmarking systems of the OECD have been extended to include Georgia

The results draw on the OECD Price Benchmarking systems produced by the OECD Price Benchmarking group within TechInsights, extended to include pricing for operators in Georgia.

- For the fixed broadband results, the OECD Fixed Broadband Price Benchmarking Q1 2023 update has been used, based on pricing data collected over Q1 2023. The data collection for fixed broadband concluded on 30th March 2023.
- For the mobile voice and data results, the OECD Mobile Voice and Data Price Benchmarking Q1 2023 update has been used, based on pricing data collected over the period February to March 2023. The data collection for fixed voice concluded on 14th April 2023.
- For the bundled communication service results, the OECD Bundled Communication Price Benchmarking H1 2023 update has been used, based on pricing data collected over the period January to March 2023. The data collection for fixed voice concluded on 20th April 2023.

Results are presented for both residential and business users for both mobile voice and data and fixed broadband. For bundled services, only residential results are presented. All results are presented in USD PPP inclusive of VAT.

The cheapest result per country as calculated by the price benchmarking systems is presented in the report. The exception to this is for Georgia for fixed broadband and bundled services, where two sets of results are presented

- Results for prices based on Tbilisi – cheapest result
- Results for prices of other regions in Georgia – cheapest result.

Methodology and baskets

Methodology summary

The methodologies that form the basis for the benchmarking for this study have been developed by the OECD. The methodologies that are relevant to this study are:

- OECD Mobile Voice and Data Price Benchmarking Methodology
- OECD Fixed Broadband Price Benchmarking Methodology
- OECD Bundled Communications Price Benchmarking Methodology

For the standalone services (mobile voice and data, fixed broadband), the price comparisons are based on the OECD 2017 telecommunication price basket methodology, while for bundled services, the price comparisons are based on the OECD 2020 bundled communication price basket methodology of the OECD, these being the most recent reviews of these methodologies.

All data is captured in local currency and converted to USD using published exchange rates. The exchange rates used are from oanda.com as of 1 March 2023. The PPP conversion uses World Bank “Comparative Price Levels” from 2022 (the most recent available).

A short summary of the methodology for the 3 services is shown in the following slides. The full methodology documents for both the 2017 baskets for standalone services and for the 2020 Bundled Communication Price baskets can be found on the OECD website, while a condensed version of the methodology can be found in the methodology report which accompanies this report.

Baskets for mobile voice and data

The results presented for mobile are based on the OECD 2017 baskets for mobile voice and data. There are 12 different OECD basket definitions, including 2 'no data' baskets, 5 low data baskets, and 5 high data baskets. Mobile calls are approximately 1.75 minutes in length and vary by call type and basket.

The benchmarking covers the following elements, as and where they apply:

- Connection charge
- Monthly rental for basic post-paid service
- Minimum monthly top up for pre-paid service
- Any option charges for add-on elements
- Prices for voice calls to fixed network, own network, and other mobile networks, including:
 - Call set-up
 - Minimum and maximum per call
 - Charge per minute/second/unit
 - Variation over daytime/evening/weekend
- Prices for SMS messages
- Prices for data access to Internet and email services

Basket	Voice calls	SMS	Data (GB)
30 calls, no data	30	10	0
100 calls, no data	100	20	0
30 calls, 0.1 GB	30	20	0.1
100 calls, 0.5 GB	100	40	0.5
300 calls, 1 GB	300	80	1
900 calls, 2 GB	900	160	2
Unlimited voice, 5 GB	Unlimited	Unlimited	5
30 calls, 0.5 GB	30	10	0.5
100 calls, 2 GB	100	20	2
300 calls, 5 GB	300	40	5
900 calls, 10 GB	900	80	10
Unlimited voice, 20 GB	Unlimited	Unlimited	20

There is no distinction between 3G, 4G or 5G technologies – and prices for all are considered.

There is no distinction between prepaid and postpaid services – prices for both are considered.

Tariffs from the largest two operators in each country are considered, and results are presented separately for residential and business pricing.

Selected baskets are presented in the main report; results for all baskets can be found in the appendix, for both residential and business pricing.

Baskets for mobile data only

This is an additional calculation to the mobile voice and data baskets, drawing on the tariff data from the OECD Mobile Voice and Data Price Benchmarking system.

It has been included to reflect the fact that users of mobile services are increasingly making use of data add-on packages to fulfil their data needs, and there is an increased focus on the cost of mobile data.

This analysis is based on mobile data-only packages that can be purchased either for standalone use or combined with mobile voice and mobile voice & data packages.

To ensure consistency with OECD baskets, the usage allowances defined in the OECD Mobile Broadband baskets will be used.

As with the mobile voice and data analysis, results for business pricing are additionally included, and results are based on the two main operators in each country.

	Usage volume (GB/month)
0.5 GB basket	0.5
1 GB basket	1
2 GB basket	2
5 GB basket	5
10 GB basket	10
20 GB basket	20
50 GB basket	50

Baskets for fixed broadband

The results presented for fixed broadband are based on the OECD 2017 baskets for fixed broadband.

There are 15 OECD baskets in total - 5 each of low, medium and high usage (5-900 GB/month) . Minimum speed levels range from 0.25 Mb/s minimum download speed to 1 Gb/s minimum download speed. The official OECD results focus on the **medium** usage levels

The benchmarking covers the following elements, as and where they apply:

- Advertised download speed
- Connection charge
- Monthly rental for broadband service, plus any incumbent line rental that may be required
- Usage allowance included in the package
- Overage charges beyond the allowance
- Fair use limitations / Maximum usage
- Equipment charge/rental e.g., modem or router

Offers based on xDSL, fibre and fixed wireless technologies are considered. The OECD results do not consider the technology and are technology neutral. For COMCOM, an additional analysis of fibre-only pricing has been included.

- Fixed broadband services in Georgia are predominantly based on fibre. Over 88% of residential fixed broadband users and over 81% of business fixed broadband users have 1 fibre-based service.

Tariffs from the main three providers in each country are considered, with >70% combined market share, and results are presented separately for residential and business pricing.

- In the case of Georgia, there are only two main ISPs, and these account for >70% combined market share.
 - Pricing for both Tbilisi and other regions are taken into account.

Selected baskets are presented in the main report; results for all relevant baskets can be found in the appendix, for both residential and business pricing.

Minimum Download Speed (Mb/s)	Low alternative data volume (GB/month)	Medium data volume (GB/month)	High alternative data volume (GB/month)
0.256	5	15	45
10	10	30	90
25	20	60	180
100	40	120	360
1000	100	300	900

Bundled communication services

The results presented for bundled services are based on the OECD 2020 baskets for bundled communication services.

There are 30 baskets in total.

- Bundle types:
 - Fixed broadband and fixed voice
 - Fixed broadband and pay TV
 - Fixed broadband, fixed voice and pay TV
 - Fixed broadband, fixed voice and mobile voice & data
 - Fixed broadband, fixed voice, mobile voice & data, and pay TV
- For each bundle type, there are 6 usage levels, from basic to very high.
- In Georgia – only fixed broadband and TV bundles are considered, as no other available bundles for Georgia feature in the OECD baskets.

The types of bundled offerings cover :

- Predetermined hard bundles
- Soft bundles –where adding on extra services attracts a discount
- Build-your-own bundle – bundles more customised, built from options for each service

Offers based on xDSL, fibre and fixed wireless technologies are considered

- The OECD results do not consider the technology and are technology neutral. For COMCOM, an additional analysis of fibre-only pricing has been included..

Tariffs from the main three providers in each country are considered, with >70% combined market share. Results are presented for residential pricing only.

- In the case of Georgia, there are only two largest ISPs, and these account for >70% combined market share.
 - Pricing for both Tbilisi and other regions are taken into account.

Selected baskets are presented in the main report; results for all relevant baskets can be found in the appendix, for both residential and business pricing.

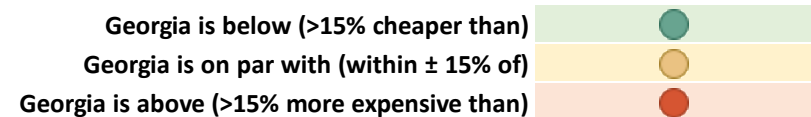
Baskets	FBB		FV	MVD		TV			
	Usage (GB)	Speed (Mb/s Down load)	Voice calls	Voice allowance (minutes)	Data allowance (GB)	Channels	Premium Movies	Premium Sports	DVR
OECD FBB - FV (Basic)	15	2	20						
OECD FBB - FV (Low)	60	25	20						
OECD FBB - FV (Medium Low)	120	100	60						
OECD FBB - FV (Medium High)	240	250	60						
OECD FBB - FV (High)	360	600	140						
OECD FBB- FV (Very High)	900	1000	140						
OECD FBB - TV (Basic)	15	2				10	FALSE	FALSE	FALSE
OECD FBB - TV (Low)	60	25				20	FALSE	FALSE	FALSE
OECD FBB - TV (Medium Low)	120	100				30	TRUE	FALSE	FALSE
OECD FBB - TV (Medium High)	240	250				40	TRUE	FALSE	FALSE
OECD FBB - TV (High)	360	600				80	TRUE	TRUE	TRUE
OECD FBB - TV (Very High)	900	1000				150	TRUE	TRUE	TRUE
OECD FBB - FV - TV (Basic)	15	2	20			10	FALSE	FALSE	FALSE
OECD FBB - FV - TV (Low)	60	25	20			20	FALSE	FALSE	FALSE
OECD FBB - FV - TV (Medium Low)	120	100	60			30	TRUE	FALSE	FALSE
OECD FBB - FV - TV (Medium High)	240	250	60			40	TRUE	FALSE	FALSE
OECD FBB - FV - TV (High)	360	600	140			80	TRUE	TRUE	TRUE
OECD FBB - FV - TV (Very High)	900	1000	140			150	TRUE	TRUE	TRUE
OECD FBB- FV- MVD (Basic)	15	2	20	0	0				
OECD FBB- FV- MVD (Low)	60	25	20	60	1				
OECD FBB- FV- MVD (Medium Low)	120	100	60	200	5				
OECD FBB- FV- MVD (Medium High)	240	250	60	200	10				
OECD FBB- FV- MVD (High)	360	600	140	600	20				
OECD FBB- FV- MVD (Very High)	900	1000	140	600	30				
OECD FBB- FV- MVD- TV (Basic)	15	2	20	0	0	10	FALSE	FALSE	FALSE
OECD FBB- FV- MVD- TV (Low)	60	25	20	60	1	20	FALSE	FALSE	FALSE
OECD FBB- FV- MVD- TV (Medium Low)	120	100	60	200	5	30	TRUE	FALSE	FALSE
OECD FBB- FV- MVD- TV (Medium High)	240	250	60	200	10	40	TRUE	FALSE	FALSE
OECD FBB- FV- MVD- TV (High)	360	600	140	600	20	80	TRUE	TRUE	TRUE
OECD FBB- FV- MVD- TV (Very High)	900	1000	140	600	30	150	TRUE	TRUE	TRUE

Summary of findings

Summary of findings (1)

		Residential	Business
		Georgia compared to European average	Georgia compared to European average
Fixed broadband - all technologies	>= 0.25 Mb/s, 15GB basket	●	●
	>= 10 Mb/s, 30GB basket	● Tbilisi	●
	>= 25 Mb/s, 60GB basket	● Regional	●
	>= 100 Mb/s, 120GB basket	●	●
Fixed broadband - fibre only	>= 0.25 Mb/s, 15GB basket	● Regional	●
	>= 10 Mb/s, 30GB basket	● Regional	●
	>= 25 Mb/s, 60GB basket	● Regional	●
	>= 100 Mb/s, 120GB basket	●	●
Mobile voice and data	OECD 2017: 30 calls, no data	●	●
	OECD 2017: 100 calls, no data	●	●
	OECD 2017: 30 calls, 0.1 GB	●	●
	OECD 2017: 100 calls, 0.5 GB	●	●
	OECD 2017: 300 calls, 1 GB	●	●
	OECD 2017: 900 calls, 2 GB	●	●
	OECD 2017: Unlimited voice, 5 GB	●	●
	OECD 2017: 30 calls, 0.5 GB	●	●
	OECD 2017: 100 calls, 2 GB	●	●
	OECD 2017: 300 calls, 5 GB	●	●
	OECD 2017: 900 calls, 10 GB	●	●
	OECD 2017: Unlimited voice, 20 GB	●	●
Mobile data only (add-on)	0.5 GB basket	●	●
	1 GB basket	●	●
	2 GB basket	●	●
	5 GB basket	●	●
	10 GB basket	●	●
	20GB basket	●	●
	50GB basket	●	●
Bundled services - all technologies	FBB and TV basic	● Regional	●
	FBB and TV low	● Regional	●
	FBB and TV medium low	● Tbilisi	●
Bundled services - fibre only	FBB and TV basic	● Regional	●
	FBB and TV low	● Regional	●
	FBB and TV medium low	● Tbilisi	●

- The table shows the position of Georgia relative to the European average, for all the services considered in this study, and all baskets. Results are shown for residential and business pricing separately, with colour coding to indicate whether Georgia is above, below or on par with the European average cost.
 - Green indicates that Georgia is more than 15% cheaper than the European average
 - Yellow indicates that Georgia is within 15% of the European average (so, up to 15% cheaper or more expensive)
 - Red indicates that Georgia is more than 15% more expensive than the European average.
- For fixed broadband and bundled communication services, where there is a variation in pricing for Tbilisi and other regions in Georgia, the cheapest offer is specified on the table.
- More detailed results can be found in the individual sections later in the report.



Result observations for residential mobile voice and data

	Residential - USD PPP inc VAT			
	Georgia	European average	Georgia rank (out of 24)	Georgia to European average
OECD 2017: 30 calls, no data	4	11	1	-60%
OECD 2017: 100 calls, no data	13	16	10	-22%
OECD 2017: 30 calls, 0.1 GB	9	14	5	-38%
OECD 2017: 100 calls, 0.5 GB	15	20	8	-26%
OECD 2017: 300 calls, 1 GB	29	24	16	18%
OECD 2017: 900 calls, 2 GB	32	27	18	21%
OECD 2017: Unlimited voice, 5 GB	37	37	16	1%
OECD 2017: 30 calls, 0.5 GB	9	15	4	-41%
OECD 2017: 100 calls, 2 GB	21	22	11	-6%
OECD 2017: 300 calls, 5 GB	35	28	18	23%
OECD 2017: 900 calls, 10 GB	47	35	19	35%
OECD 2017: Unlimited voice, 20 GB	63	46	18	36%

The results for residential mobile voice and data pricing in Georgia are mixed.

For five of the twelve baskets, Georgia is more than 15% above the European average, and the higher usage baskets are much higher than the average. As in other European countries, average mobile data use in Georgia is increasing, and was just under 12 GB by the end of 2022*. This means that on average user in Georgia will compare less favourably to other European countries, and those with very high usage will be significantly less favourable, comparatively.

For the five baskets (out of the twelve) that are more than 15% below the European average, these are for lower usage.

The mobile market for consumers is especially competitive in Europe, driven by aggressive pricing by operators in a bid to maintain and win market share.

Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

* ComCom Annual Report 2022 - <https://comcom.ge/uploads/other/11/11972.pdf>

Result observations for business mobile voice and data

	Business - USD PPP inc VAT		Georgia rank (out of 24)	Georgia to European average
	Georgia	European average		
OECD 2017: 30 calls, no data	4	24	1	-82%
OECD 2017: 100 calls, no data	7	28	1	-75%
OECD 2017: 30 calls, 0.1 GB	10	26	2	-60%
OECD 2017: 100 calls, 0.5 GB	12	30	2	-59%
OECD 2017: 300 calls, 1 GB	18	34	4	-46%
OECD 2017: 900 calls, 2 GB	34	40	15	-13%
OECD 2017: Unlimited voice, 5 GB*	40	39	15	4%
OECD 2017: 30 calls, 0.5 GB	10	27	2	-63%
OECD 2017: 100 calls, 2 GB	15	32	2	-54%
OECD 2017: 300 calls, 5 GB	25	37	4	-32%
OECD 2017: 900 calls, 10 GB	46	45	18	1%
OECD 2017: Unlimited voice, 20 GB*	63	46	16	36%

* Rank out of 20

The results for business mobile voice and data pricing in Georgia are broadly very favourable, with many of the baskets showing the cost for Georgia well below the European average.

For eight of the twelve baskets, Georgia sits in the top 4 in terms of cost and is either cheapest or second cheapest for six of these baskets.

However, like residential mobile voice and data, as usage increases, the competitive position of Georgia decreases, and for the highest usage basket, – unlimited voice and 20 GB – Georgia is much higher than European average. This is driven by voice costs, rather than data..

Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

Result observations for residential mobile data only

	Residential - USD PPP inc VAT		Georgia rank (out of 24)	Georgia to European average	No. of subscribers*	% of subscribers
	Georgia	European average				
0.5GB	6	8	9	-25%	78,603	13%
1GB	6	9	6	-35%	11,887	2%
2GB	9	12	9	-25%	159,266	27%
5GB	14	17	8	-21%	131,951	22%
10GB	20	24	11	-14%	28,922	5%
20GB	34	39	11	-13%	7,129	1%
50GB	36	77	9	-53%	173,446	29%

* average monthly number of subscribers of Silknet and Magticom using standalone mobile data

The results for residential data only are very favourable for Georgia, which ranks low to mid-range and is cheaper than the European average for all baskets, with the largest difference being for the 50 GB basket.

The ranking for Georgia is between 6 and 11, with an average ranking of 9 (out of 24)

The average cost for Georgia is between 13% and 53% below the European average cost.

It is important to keep these findings in context and exercise care with the interpretation of the results, which are based on the cost of add-on data packages, and do not consider allowances that are included as part of a 'bundled' offering with voice and SMSs.

Some operators in the European comparison countries may have bundled voice, SMS and data tariffs with very large data or unlimited allowances, coupled with limited add-on offerings, that may be less competitively priced. This can encourage users to select bundled tariffs that have an initial larger allowance.

Results for all baskets are shown above; those highlighted in bold are presented in the report. The green highlight indicates that Georgia is at least 15% below the European average, while yellow indicates that Georgia is on par with (within + or - 15%) the European average.

Result observations for business mobile data only

	Business - USD PPP inc VAT		Georgia rank (out of 21)	Georgia to European average
	Georgia	European average		
0.5GB	6	12	5	-53%
1GB	6	13	3	-56%
2GB	8	16	4	-51%
5GB	13	24	5	-48%
10GB	17	34	2	-49%
20GB	34	57	5	-40%
50GB	68	124	4	-45%

The results for business data only are very favourable for Georgia, and more so than for residential pricing, and the ranking for Georgia is between 2 and 5, with an average ranking of 4 (out of 21)

The average cost of add-on business data in Georgia is significantly below the European average for all baskets.

The cost for Georgia is between 40%-56 % lower than the average cost for Europe.

It is important to keep these findings in context and exercise care with the interpretation of the results, which are based on the cost of add-on data packages, and do not consider allowances that are included as part of a 'bundled' offering with voice and SMSs.

The findings cannot be considered an indication of the cost an end user will pay for their mobile usage

Some operators in the European comparison countries may have bundled voice, SMS and data tariffs with very large data or unlimited allowances, coupled with limited add-on offerings, that may be less competitively priced. This can encourage users to select bundled tariffs that have an initial larger allowance.

Results for all baskets are shown above; those highlighted in bold are presented in the report. The green highlight indicates that Georgia is at least 15% below the European average.

Result observations for residential fixed broadband

		Residential - USD PPP inc VAT			Georgia Tbilisi rank (out of 24)	Georgia Regions rank (out of 24)	Georgia Tbilisi to European average	Georgia Regions to European average	Number of subscribers*	% of subscribers
		Georgia Tbilisi	Georgia Regions	European average						
Fixed broadband	>= 0.25 Mb/s, 15GB	28	28	36	6	6	-23%	-23%	130	0%
All technologies	>= 10 Mb/s, 30GB	28	34	37	7	11	-23%	-7%	5,093	2%
	>= 25 Mb/s, 60GB	39	34	39	15	8	1%	-12%	207,417	96%
	>= 100 Mb/s, 120GB	112	112	46	24	25	145%	145%	4,336	2%
Fixed broadband Fibre only	>= 0.25 Mb/s, 15GB	39	34	40	13	9	-3%	-16%	128	0%
	>= 10 Mb/s, 30GB	39	34	40	13	9	-3%	-16%	193	0%
	>= 25 Mb/s, 60GB	39	34	41	13	6	-5%	-17%	206,590	98%
	>= 100 Mb/s, 120GB	112	112	47	24	24	136%	136%	4,336	2%

* average monthly number of subscribers of Silknet and Magticom using standalone fixed broadband.

While Georgia sits well below the European average for the two lowest speed baskets, as the basket speed increases, the competitive position of Georgia decreases, and for the 100 Mb/s basket, Georgia is the most expensive overall. This trend of declining competitiveness as speed increases is seen for results based on all technologies and on fibre services only.

Most users in Georgia will subscribe to lower speed services, as high speeds are very expensive. At the end of 2022, only 1% of Georgian users subscribed to a fixed broadband services (bundles and standalone, 2% for only standalone) at 100 Mb/s or above, compared to 55% in Europe (on average), ranging from 20% for Greece to 87% for Spain (European data source: DESI 2023 Indicators, EC Europa). The very low numbers taking higher speed services in Georgia is driven by the very high prices for high speed, which see Georgia as the most expensive for the highest speed basket for which results are available. Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia.

There is a degree of variation between pricing in Tbilisi and other regions; Pricing in the regions is generally more favourable than Tbilisi pricing. Where this is true, pricing the regions can be up to 13% cheaper than pricing for Tbilisi.

Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

The results consider the medium usage set of OECD baskets for selected speeds. As most services offer unlimited broadband, the results for the low and high usage baskets for fixed broadband will be identical or near-identical.

Result observations for business fixed broadband

		Business - USD PPP inc VAT			Georgia Tbilisi rank	Georgia Tbilisi rank	Georgia Tbilisi to	Georgia Regions to	Number of	% of
		Georgia Tbilisi	Georgia Regions	European average	(out of 24 (23 for	(out of 24 (23 for	European average	European average	subscribers*	subscribers
Fixed broadband	>= 0.25 Mb/s, 15GB	30	30	43	4	5	-30%	-30%	14,580	48%
All technologies	>= 10 Mb/s, 30GB	38	38	44	7	8	-12%	-12%	2,731	9%
	>= 25 Mb/s, 60GB	48	48	47	12	13	0%	0%	1,632	5%
Fixed broadband	>= 0.25 Mb/s, 15GB	65	65	53	18	19	24%	24%	12,783	45%
Fibre only	>= 10 Mb/s, 30GB	165	165	57	22	23	189%	189%	2,510	9%

* average monthly number of business subscribers of Silknet and Magticom. Around 17,000 business subscribers use nonstandard offers that are not presented on the slide

Business services in Georgia for which prices are publicly available are generally very modest speeds – up to 10 Mb/s for services based on fixed (fibre-based) connections, and up to 50 Mb/s for LTE-based services (although these are rarely subscribed to). Beyond this speed, prices and services are agreed case-by-case, and high-speed standard business offers are not transparent on the market.

For fibre-only prices, which are used by most business users, Georgia pricing is above the European average for the two baskets for which prices are published, and for the highest speed basket is overall most expensive. There are no prices published for speeds of 25 Mb/s or above.

When all technologies considered, Georgia is very close to the European average for the 25 Mb/s basket, with the result based on an LTE-based service, while the lower speed baskets show Georgia as more favourable. Note, however, that subscribers taking LTE-based business services account for less than 1% of business broadband users.

There is no distinction between pricing in Tbilisi and in the Regions.

Results for all baskets are shown above; and are also presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

The results consider the medium usage set of OECD baskets for selected speeds. Like residential broadband, as most services offer unlimited broadband, the results for the low and high usage baskets for fixed broadband will be identical or near-identical.

Result observations for bundled communication services

		Residential - USD PPP inc VAT			Georgia Tbilisi rank (out of 24)	Georgia Regions rank (out of 24)	Georgia Tbilisi to European average	Georgia Regions to European average	Number of subscribers	% of subscribers
		Georgia Tbilisi	Georgia Regions	European average						
FBB	FBB-TV basic, 2 Mbps, 10 channels	50	38	59	10	6	-15%	-36%	11,841	2%
All technologies	FBB-TV low, 25 Mbps, 20 channels	50	38	61	9	5	-18%	-38%	560,272	97%
	FBB-TV medium low, 100 Mbps, 30 channels	123	127	92	22	24	33%	38%	7,647	1%
FBB	FBB-TV basic, 2 Mbps, 10 channels	50	38	64	9	5	-21%	-40%	4	0%
Fibre only	FBB-TV low, 25 Mbps, 20 channels	50	38	66	8	4	-24%	-43%	560,272	99%
	FBB-TV medium low, 100 Mbps, 30 channels	123	127	94	19	21	30%	35%	7,647	1%

Bundled services are limited to fixed broadband and TV, plus fixed broadband, mobile voice and data and TV. As there are no OECD baskets which feature fixed broadband, mobile voice and data and TV, only results for fixed broadband and TV are shown. Further, the fibre only costs for Georgia are identical to the all-technologies results, as bundled offers are based on fibre only.

Both Tbilisi and regional pricing for the lowest two baskets sit below the European average, for both all-technology pricing and fibre-only pricing. Regional pricing in Georgia for these baskets is 24% cheaper than pricing in Tbilisi.

For the highest usage basket, however, both regional and Tbilisi pricing is significantly above the European average, driven by the high cost of fixed broadband at higher speeds, with pricing for Tbilisi slightly cheaper than regional pricing. As with standalone broadband, most users in Georgia will subscribe to lower speed services, as high speeds are very expensive, and only a very small proportion of users in Georgia (1%) subscribe to services at 100 Mb/s or above, which is significantly lower than the European comparison countries. The very low numbers taking higher speed services in Georgia is driven by the very high prices for high speed, which see Georgia as one of the most expensive for the highest speed basket for which results are available. Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia.

As pricing for Georgia is fibre-based, the 'all technology' costs for Georgia do not differ to the fibre-based costs. This is not the case in all countries, and the fibre-only results produce slightly more favourable results for Georgia.

Results for all baskets are presented in the table above. As there are only three baskets which show results for Georgia, all the results are also included in the rest of this section and are shown in bold in the above table. Green highlight indicates that Georgia is at least 15% below the European average; red indicates that Georgia is at least 15% more expensive than the European average.

Summary of findings (2)

There is a broad mix of results for Georgia across the different services as well as by residential and business pricing.

The results for **residential mobile voice and data** pricing in Georgia are mixed. For five of the twelve baskets, Georgia is above the European average, and the higher usage baskets are much higher than the average. As in other European countries, average mobile data use in Georgia is increasing, and was just under 12 GB by the end of 2022. This means that on average user in Georgia will compare less favourably to other European countries, and those with very high usage will be significantly less favourable, comparatively. For the five baskets (out of the twelve) that are below the European average, these are for lower usage.

The results for **business mobile voice and data** pricing in Georgia are broadly very favourable, with many of the baskets showing the cost for Georgia well below the European average. For eight of the twelve baskets, Georgia sits in the top 4 in terms of cost and is either cheapest or second cheapest for six of these baskets. However, like residential mobile voice and data, as usage increases, the competitive position of Georgia decreases, and for the highest usage basket, – unlimited voice and 20 GB – Georgia is much higher than European average.

For **mobile data only**, the results for both residential and business users are very favourable for Georgia, with the result for business pricing more favourable than for residential users. For all baskets, Georgia is cheaper than the European average cost. Note these results are based on the cost of add-on data packages, and do not consider allowances that are included as part of a 'bundled' offering with voice and SMSs. Some operators in the European comparison countries may have bundled voice, SMS and data tariffs with very large data or unlimited allowances, coupled with limited add-on offerings, that may be less competitively priced. This can encourage users to select tariffs that have an initial larger allowance.

For **fixed broadband residential pricing**, While Georgia sits well below the European average for the two lowest speed baskets, as the basket speed increases, the competitive position of Georgia decreases, and for the 100 Mb/s basket, Georgia is the most expensive overall. This trend of declining competitiveness as speed increases is seen for results based on all technologies and on fibre services only. Most users in Georgia will subscribe to lower speed services, as high speeds are very expensive. At the end of 2022, only 1% of Georgian users subscribed to a fixed broadband service at 100 Mb/s or above, compared to 55% in Europe (on average). Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia. There is a degree of variation between pricing in Tbilisi and other regions; Pricing in the regions is generally more favourable than Tbilisi pricing.

¹ ComCom Annual Report 2022 - <https://comcom.ge/uploads/other/11/11972.pdf>

Summary of findings (3)

For **fixed broadband business pricing**, where prices are published, these are generally at very modest speeds – up to 10 Mb/s for services based on fixed (fibre-based) connections, and up to 50 Mb/s for LTE-based services (although these are rarely subscribed to). Beyond this speed, prices and services are agreed case-by-case, and high-speed standard business offers are not transparent on the market.

For fibre-only prices, which are used by most business users, Georgia pricing is above the European average for the two baskets for which prices are published, and for the highest speed basket is overall most expensive. There are no prices published for speeds of 25 Mb/s or above.

When all technologies considered, Georgia is very close to the European average for the 25 Mb/s basket, with the result based on an LTE-based service, while the lower speed baskets show Georgia as more favourable. Note, however, that subscribers taking LTE-based business services account for less than 1% of business broadband users.

There is no distinction between pricing in Tbilisi and in the Regions.

For **bundled services**, Georgia sits below the European average for the lowest two baskets for both all-technology pricing and fibre-only pricing. Regional pricing in Georgia for these baskets is 24% cheaper than pricing in Tbilisi. For the highest usage basket, however, both regional and Tbilisi pricing is significantly above the European average, driven by the high cost of fixed broadband at higher speeds, with pricing for Tbilisi slightly cheaper than regional pricing. As with standalone broadband, most users in Georgia will subscribe to lower speed services, as high speeds are very expensive, and only a very small proportion of users in Georgia (1%) subscribe to services at 100 Mb/s or above, which is significantly lower than the European comparison countries. The very low numbers taking higher speed services in Georgia is driven by the very high prices for high speed, which see Georgia as one of the most expensive for the highest speed basket for which results are available. Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia.

As pricing for Georgia is fibre-based, the 'all technology' costs for Georgia do not differ to the fibre-based costs. This is not the case in all countries, and the fibre-only results produce slightly more favourable results for Georgia.

Conclusion and areas of focus

One of the key findings is that generally for the lower usage baskets, for both mobile voice and data, fixed broadband and bundles services, results for Georgia are either cheaper or on par with the European average

- For users with more modest communications requirements, pricing in Georgia is favorable

However, as usage increases, the position of Georgia compared to other European countries changes, and high volume or high speed baskets are much more expensive than the European average.

Georgian users with average and above average usage will face higher than average costs compared to the European comparison countries.

- For mobile, this impacts a lot of the market in Georgia, as average mobile data usage in Georgia is already around 12 GB.
- For fixed broadband and bundled services, very high pricing of higher speed services has been very prohibitive, with only 1% of users subscribing to broadband-based services of 100 Mb/s or above, with almost all users taking lower speed services.

The trend for usage is one of increasing speeds and data volumes

- Mobile data usage has increased dramatically over recent years, in particular with the advent of 5G services, and this increase is expected to continue
- Speeds for broadband services, either standalone or as part of a bundle, have also increased over time, and as more time is spent accessing online data, services and content, the need for higher speed services to support this is critical.

Until prices for these higher volume and higher speed services in Georgia fall, users will continue be faced with the choice of taking lower volume and lower speed services, and the restrictions they bring, or paying premium prices for greater speed and greater volumes.

Mobile voice & data results

Result observations for residential mobile voice and data

	Residential - USD PPP inc VAT			
	Georgia	European average	Georgia rank (out of 24)	Georgia to European average
OECD 2017: 30 calls, no data	4	11	1	-60%
OECD 2017: 100 calls, no data	13	16	10	-22%
OECD 2017: 30 calls, 0.1 GB	9	14	5	-38%
OECD 2017: 100 calls, 0.5 GB	15	20	8	-26%
OECD 2017: 300 calls, 1 GB	29	24	16	18%
OECD 2017: 900 calls, 2 GB	32	27	18	21%
OECD 2017: Unlimited voice, 5 GB	37	37	16	1%
OECD 2017: 30 calls, 0.5 GB	9	15	4	-41%
OECD 2017: 100 calls, 2 GB	21	22	11	-6%
OECD 2017: 300 calls, 5 GB	35	28	18	23%
OECD 2017: 900 calls, 10 GB	47	35	19	35%
OECD 2017: Unlimited voice, 20 GB	63	46	18	36%

The results for residential mobile voice and data pricing in Georgia are mixed.

For five of the twelve baskets, Georgia is more than 15% above the European average, and the higher usage baskets are much higher than the average. As in other European countries, average mobile data use in Georgia is increasing, and was just under 12 GB by the end of 2022*. This means that on average user in Georgia will compare less favourably to other European countries, and those with very high usage will be significantly less favourable, comparatively.

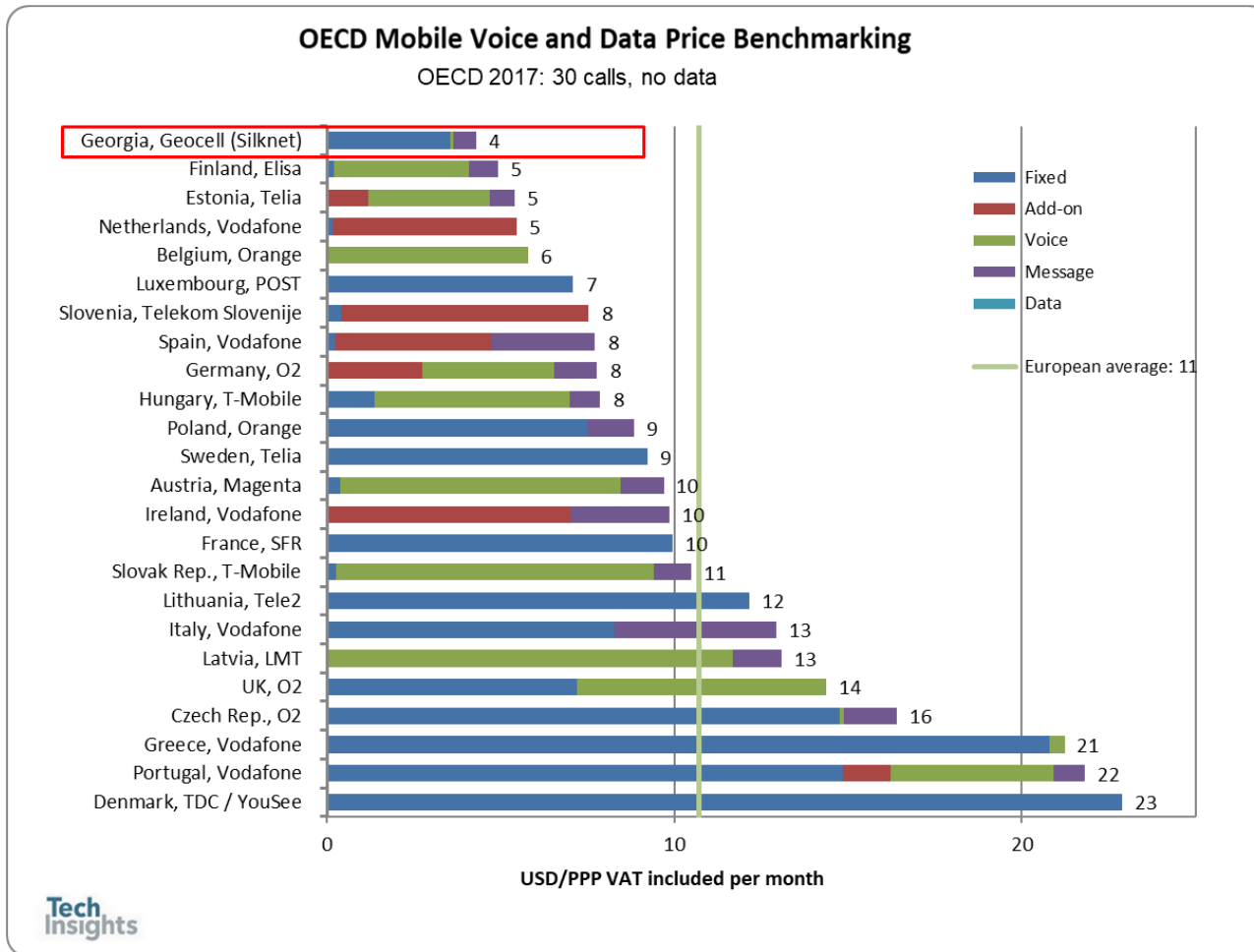
For the five baskets (out of the twelve) that are more than 15% below the European average, these are for lower usage.

The mobile market for consumers is especially competitive in Europe, driven by aggressive pricing by operators in a bid to maintain and win market share.

Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

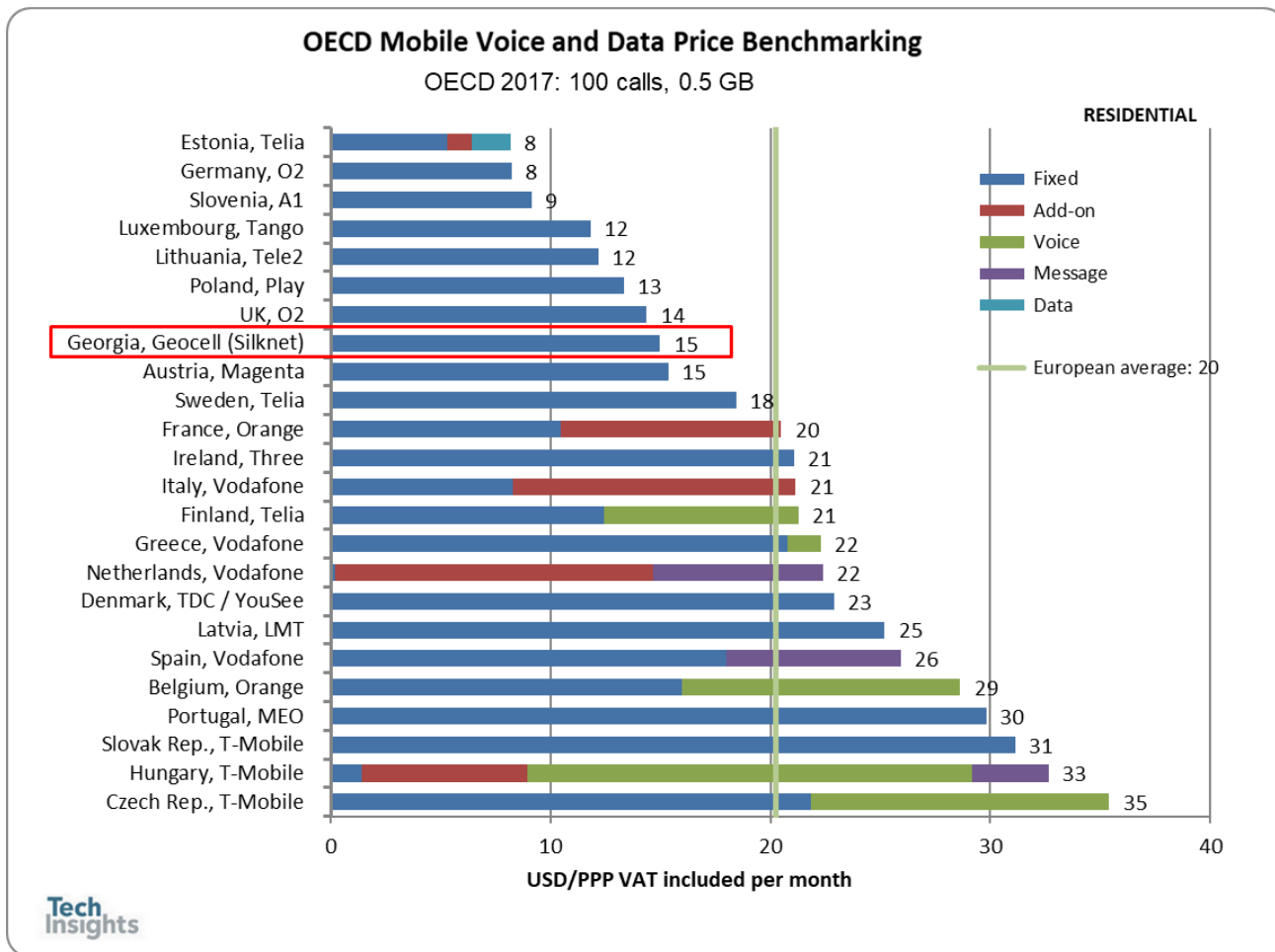
* ComCom Annual Report 2022 - <https://comcom.ge/uploads/other/11/11972.pdf>

Residential mobile voice and data: 30 calls, no data



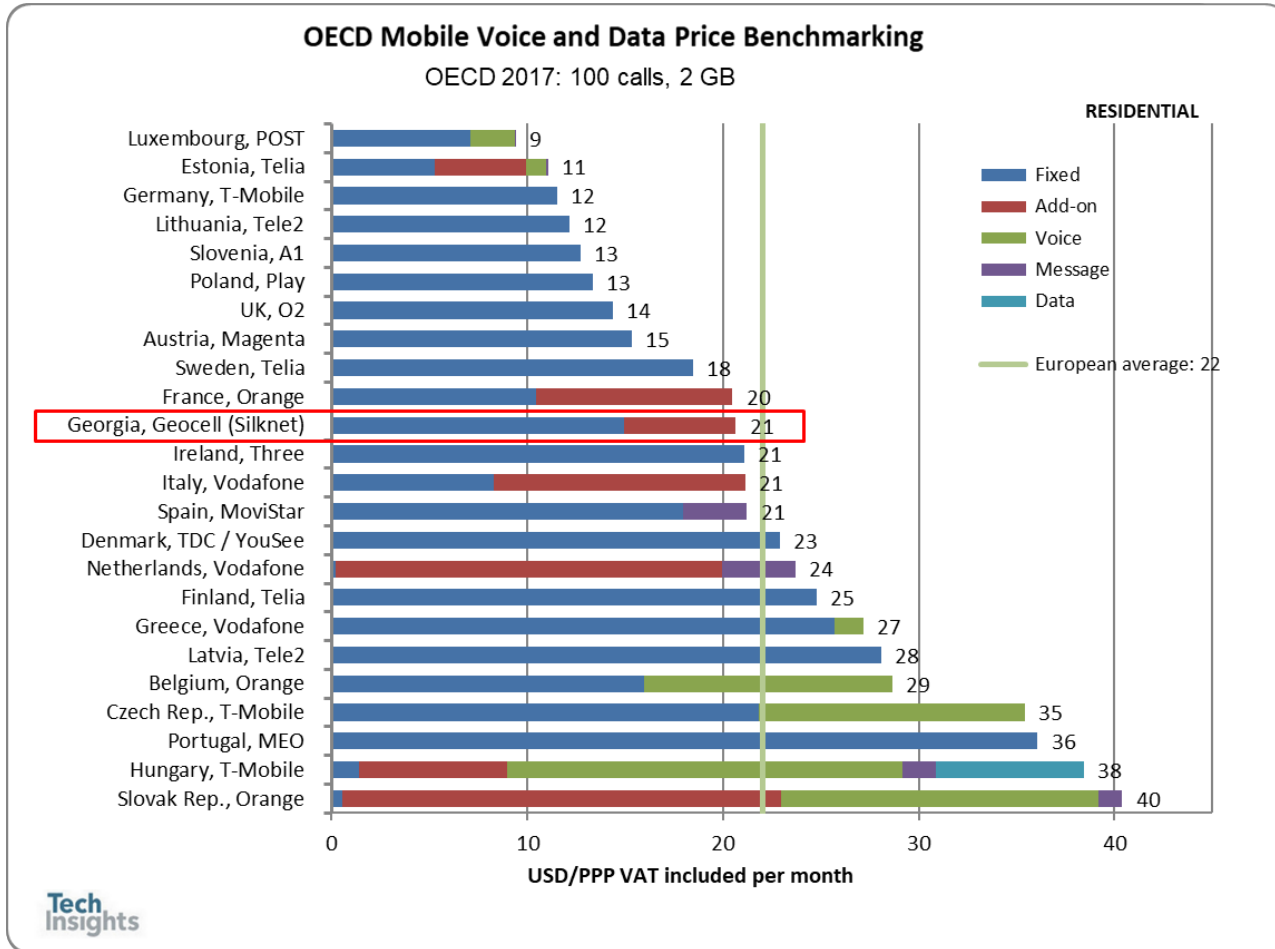
- The 30 calls basket includes modest voice and SMS usage (50 minutes and 10 SMSs) and no data and is the lowest use OECD mobile voice and data basket.
- For this basket, Georgia offers the cheapest offer.
- It is also almost 60% below the European average cost.
- The range of results for this basket is broad, with the most expensive country, Denmark, around 6 times the cost of Georgia.

Residential mobile voice and data: 100 calls, 0.5GB data



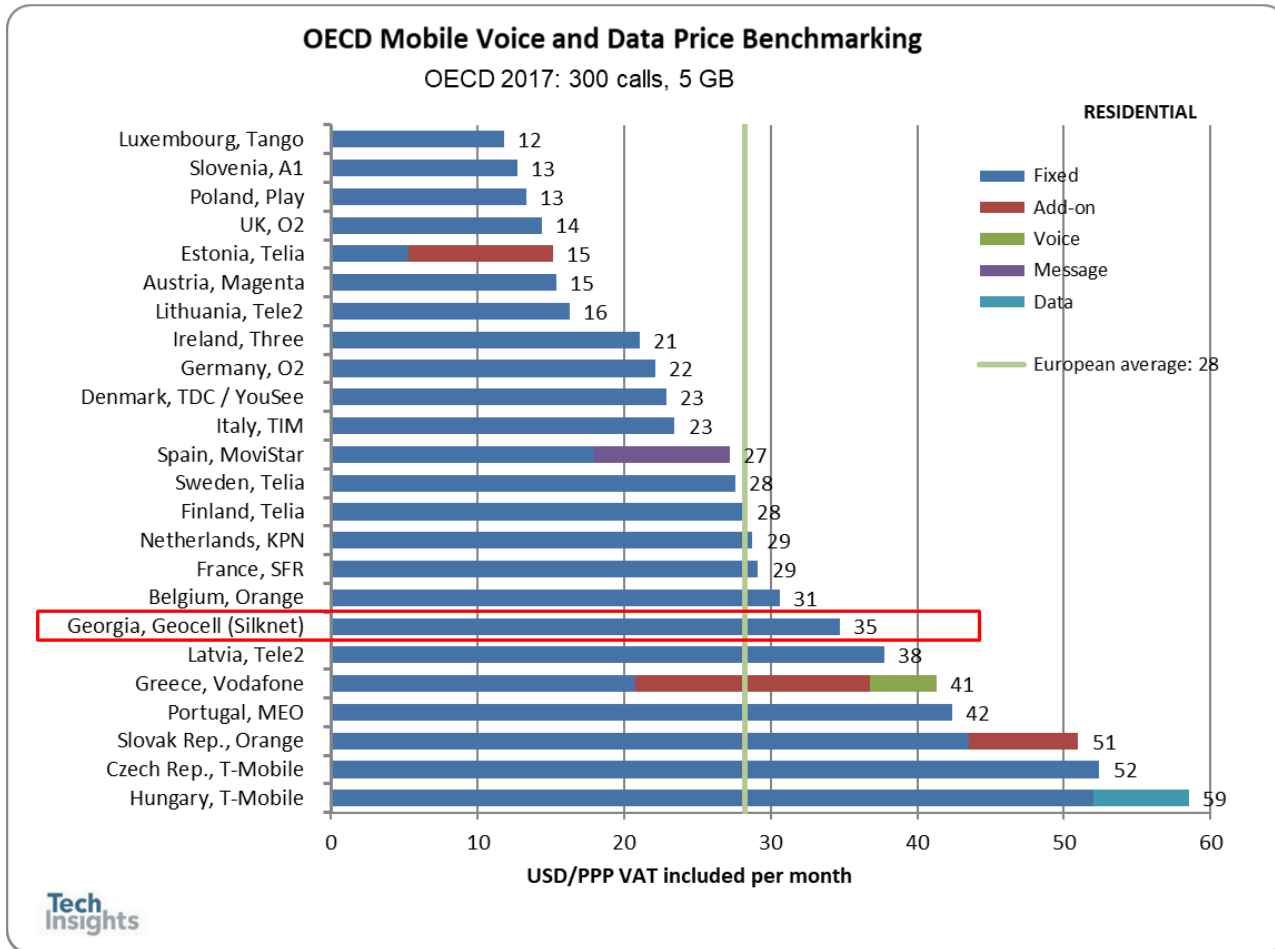
- The 100 calls, 0.5GB basket is a low to mid use OECD basket, comprising 188 minutes, 40 SMSs and 0.5GB data.
- For this basket, Georgia ranks in 8th position.
- It is also 26% below the European average cost.
- The result for Georgia is made up of a fixed cost only, meaning that the basket requirements are fully covered by the tariff.

Residential mobile voice and data: 100 calls, 2GB data



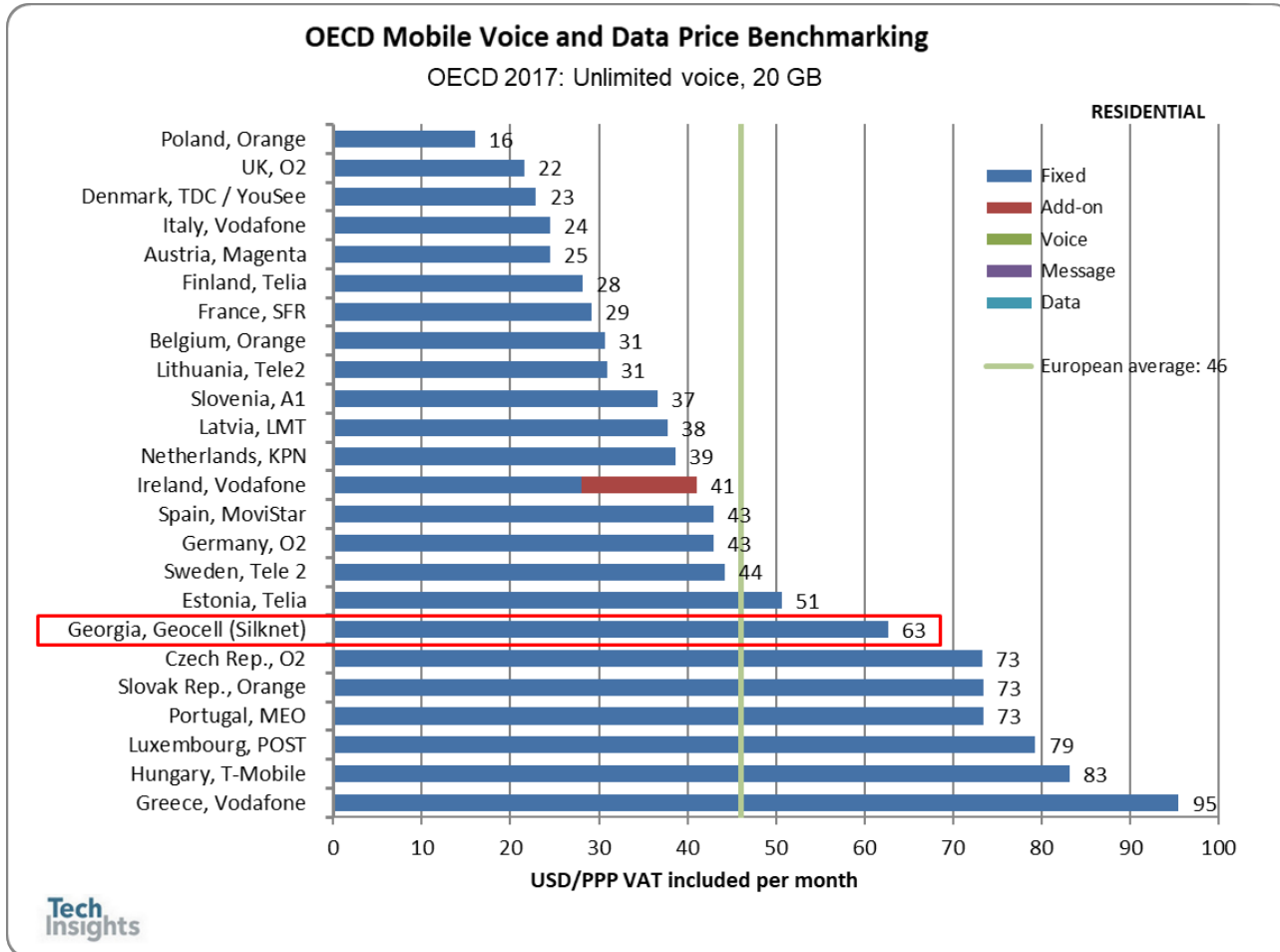
- The 100 calls, 2GB basket is a mid to high use basket, comprising 188 minutes, 20 SMSs and 2GB data.
- For this basket, the costs for Georgia are somewhat less favourable compared to the lower usage baskets.
- Georgia ranks in 11th position.
- It is 6% below the European average cost.

Residential mobile voice and data: 300 calls, 5GB data



- The 300 calls, 5GB basket, is a high use basket, comprising 577 minutes, 40 SMSs and 5GB data.
- For this basket, the costs for Georgia are quite high compared to the European average, in terms of cost and ranking.
- Georgia ranks in 18th position.
- It is 23% above the European average cost.
- As usage requirements for the baskets increase, the position of Georgia generally becomes less favourable, as is the case here.

Residential mobile voice and data: Unlimited calls, 20GB data



- The Unlimited calls, 20GB basket, is a high use basket, comprising unlimited minutes and SMSs and 20GB data.
- For this basket, the position of Georgia is less favourable, and a reversal to the lower usage baskets.
- The cost for Georgia is 36% higher than the European average of USD PPP 46.
- While Silknet is the cheapest operator for Georgia for this basket, Magticom costs are similar, just over USD PPP 2 more per month.

Result observations for business mobile voice and data

	Business - USD PPP inc VAT		Georgia rank (out of 24)	Georgia to European average
	Georgia	European average		
OECD 2017: 30 calls, no data	4	24	1	-82%
OECD 2017: 100 calls, no data	7	28	1	-75%
OECD 2017: 30 calls, 0.1 GB	10	26	2	-60%
OECD 2017: 100 calls, 0.5 GB	12	30	2	-59%
OECD 2017: 300 calls, 1 GB	18	34	4	-46%
OECD 2017: 900 calls, 2 GB	34	40	15	-13%
OECD 2017: Unlimited voice, 5 GB*	40	39	15	4%
OECD 2017: 30 calls, 0.5 GB	10	27	2	-63%
OECD 2017: 100 calls, 2 GB	15	32	2	-54%
OECD 2017: 300 calls, 5 GB	25	37	4	-32%
OECD 2017: 900 calls, 10 GB	46	45	18	1%
OECD 2017: Unlimited voice, 20 GB*	63	46	16	36%

* Rank out of 20

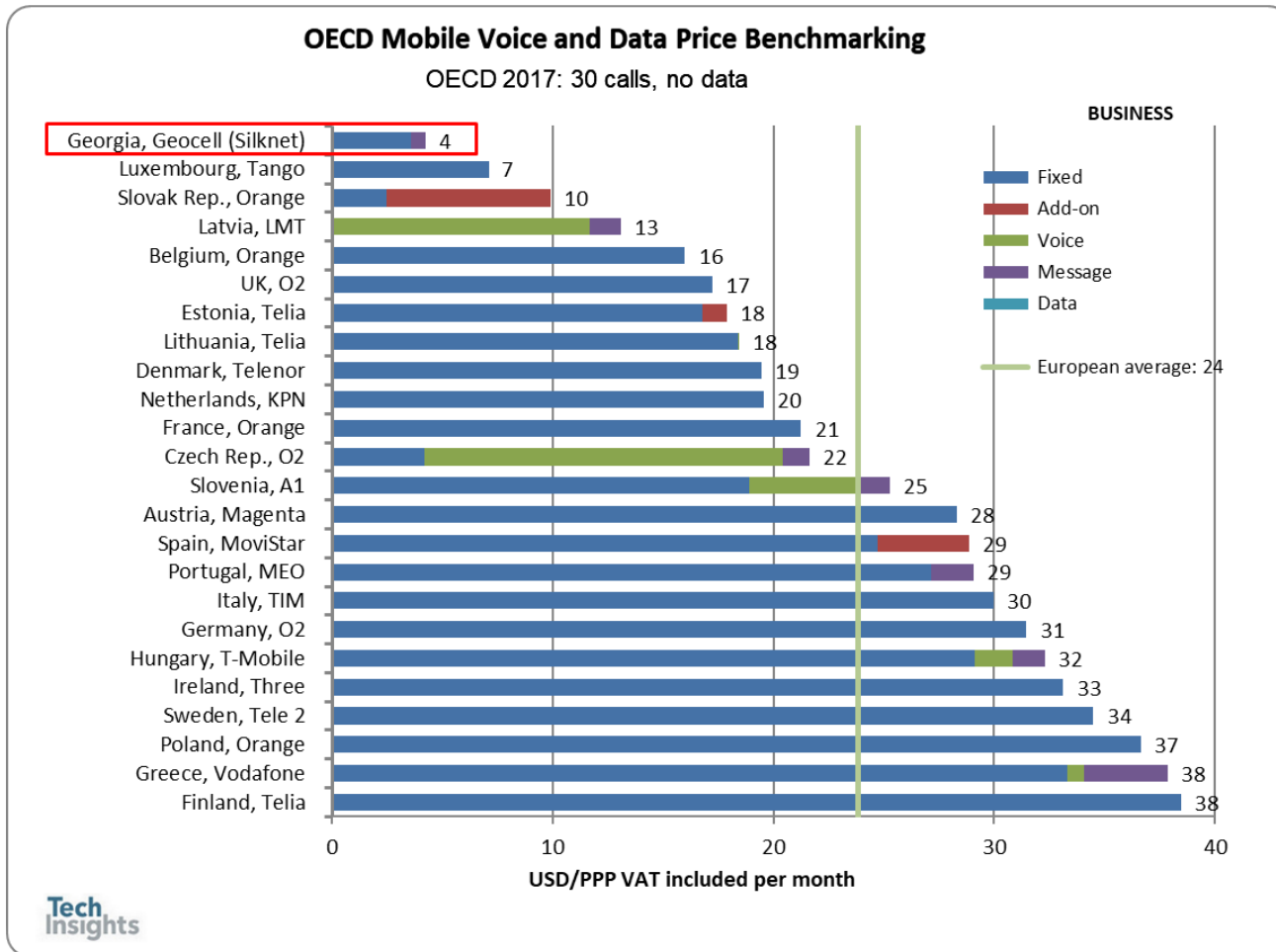
The results for business mobile voice and data pricing in Georgia are broadly very favourable, with many of the baskets showing the cost for Georgia well below the European average.

For eight of the twelve baskets, Georgia sits in the top 4 in terms of cost and is either cheapest or second cheapest for six of these baskets.

However, like residential mobile voice and data, as usage increases, the competitive position of Georgia decreases, and for the highest usage basket, – unlimited voice and 20 GB – Georgia is much higher than European average. This is driven by voice costs, rather than data..

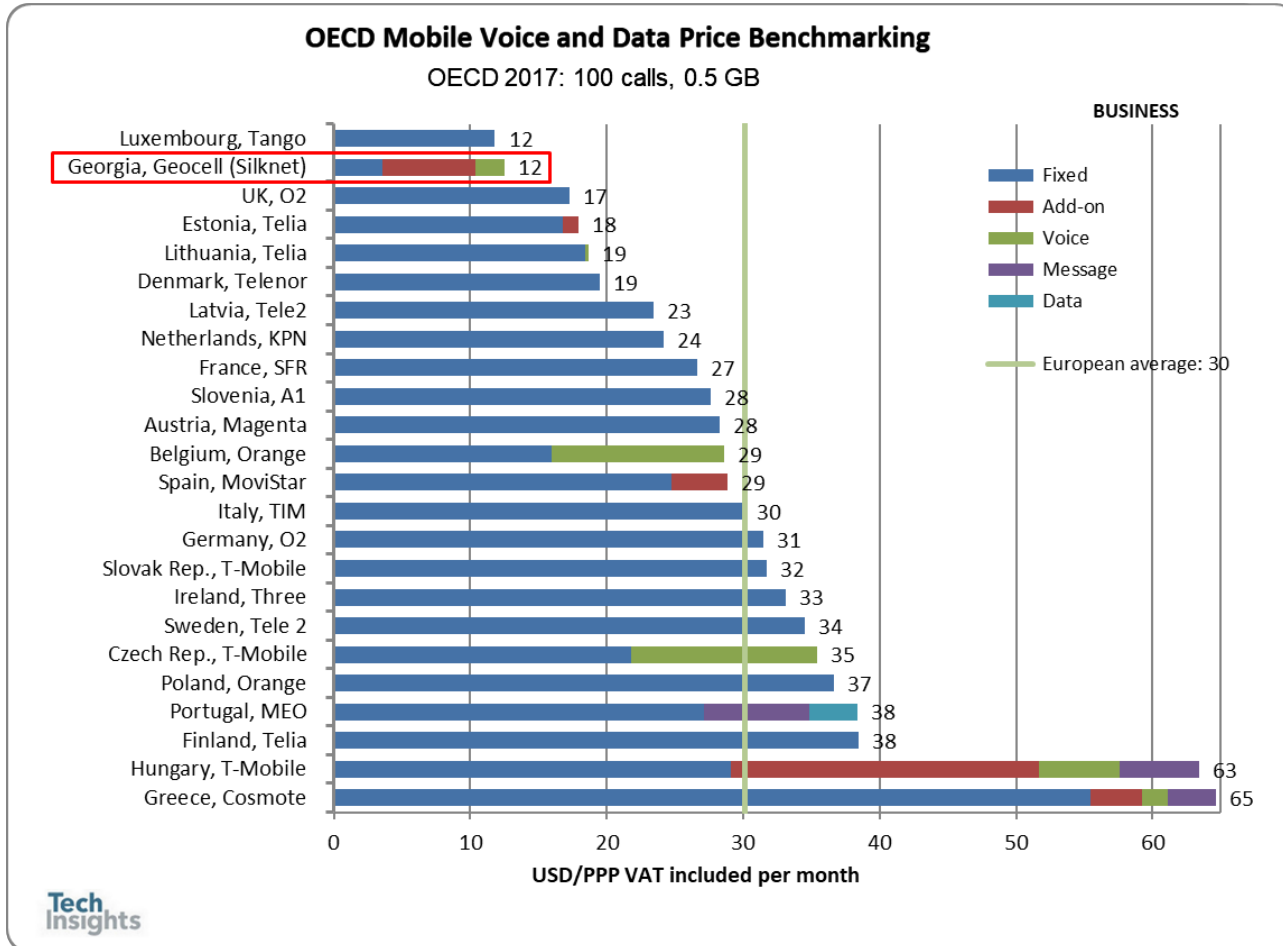
Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

Business mobile voice and data: 30 calls, no data



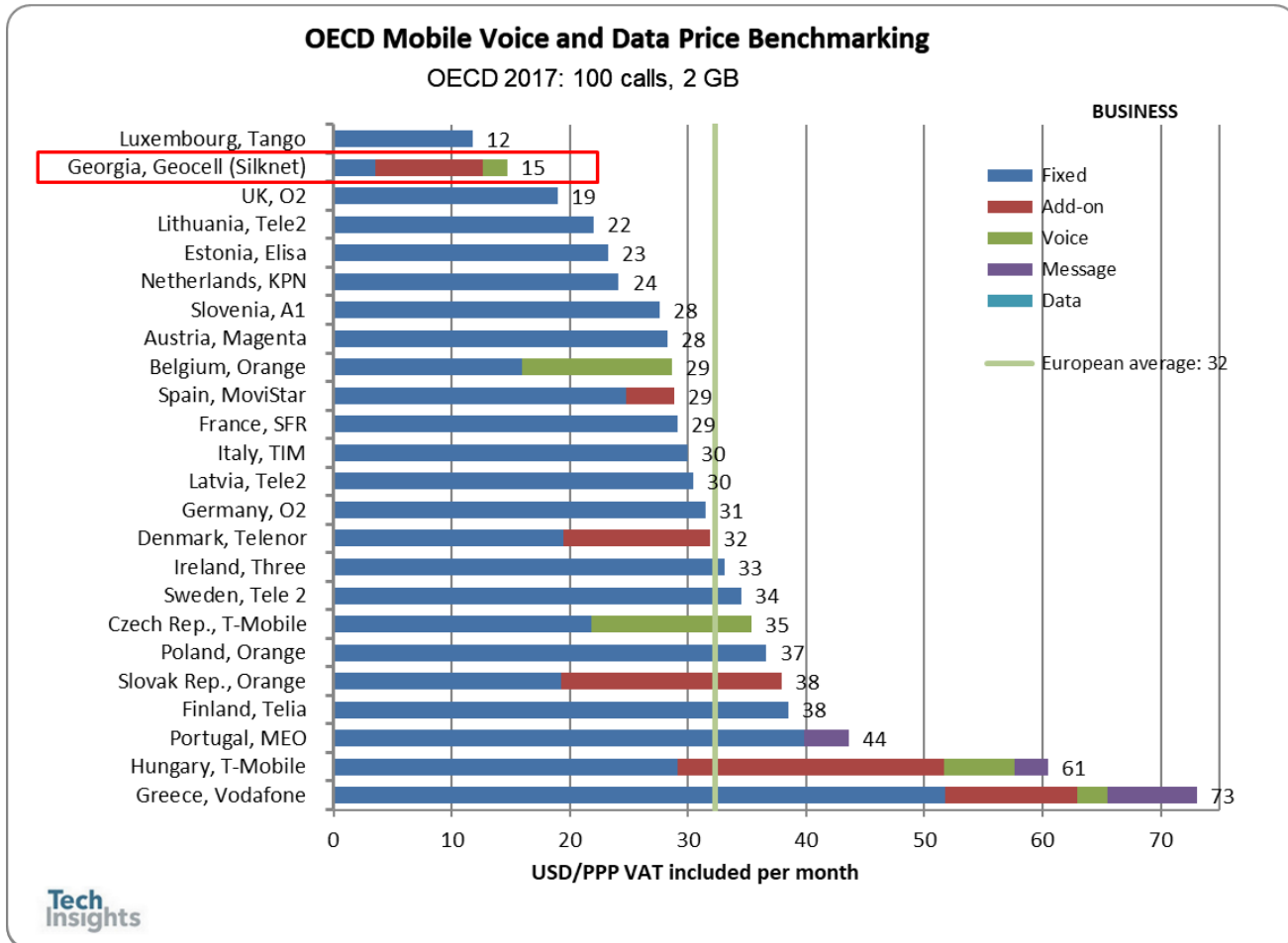
- Similar to the residential 30 calls, no data basket, the business basket results for Georgia are very favourable, with Georgia having the lowest overall cost across the European countries.
- Georgia also sits well below the European average and is 82% cheaper than the average cost of USD PPP 24.
- The costs for Georgia are based on Silknet pricing and comprise a fixed charge with a small additional charge for messages.

Business mobile voice and data: 100 calls, 0.5GB data



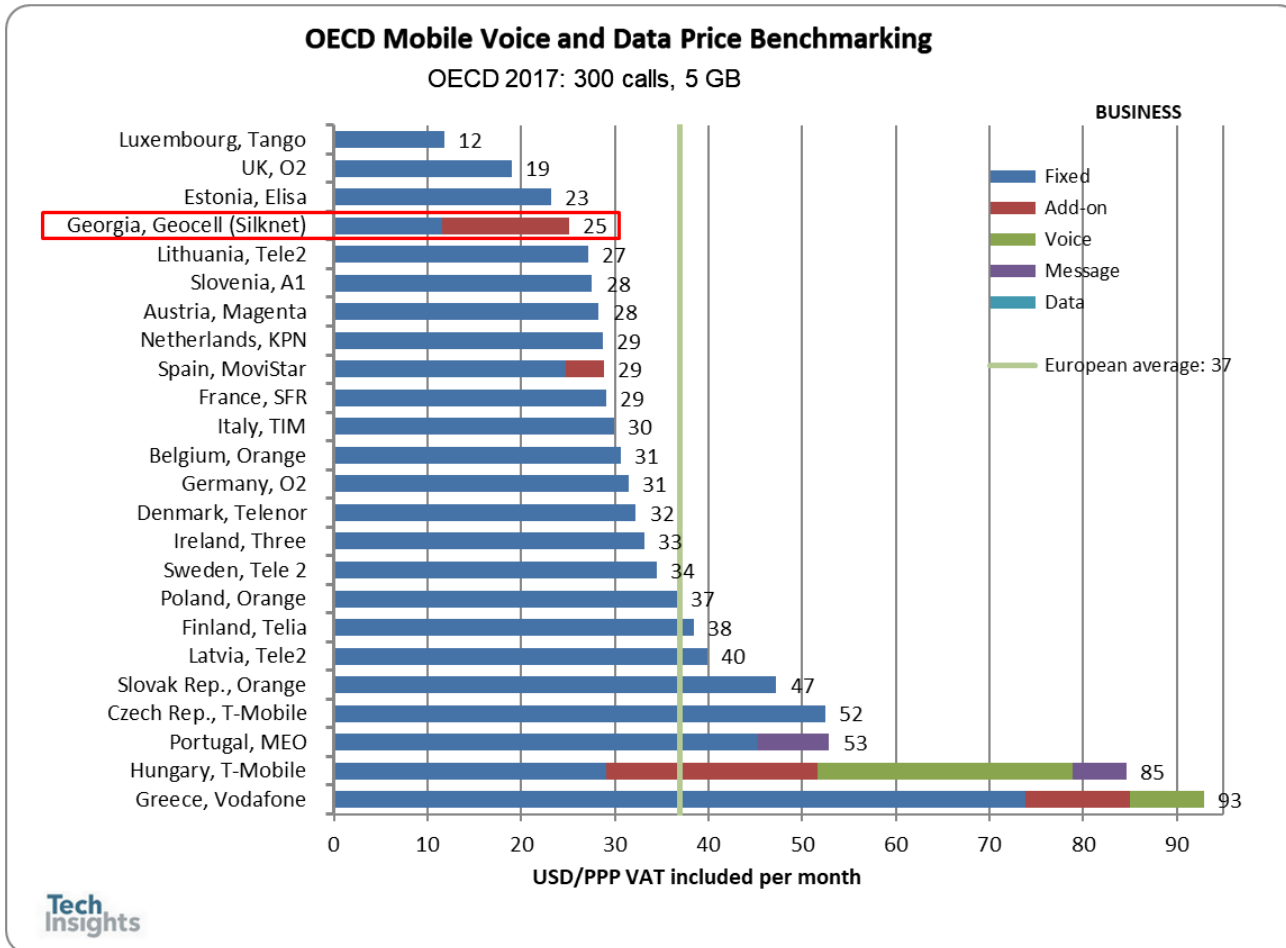
- For the 100 calls, 0.5 GB basket, even though Georgia has now moved down the ranking marginally, to second cheapest after Luxembourg, it still very favourably positioned, at USD PPP 12 for this basket, with an almost identical cost to Luxembourg.
- The Georgian costs for this basket are based on a fixed cost, plus an add-on and separate voice cost.
- Georgia sits well below the European average of USD PPP 30 and is 59% cheaper.
- The cheapest Georgian operator for this basket is Silknet.

Business mobile voice and data: 100 calls, 2GB data



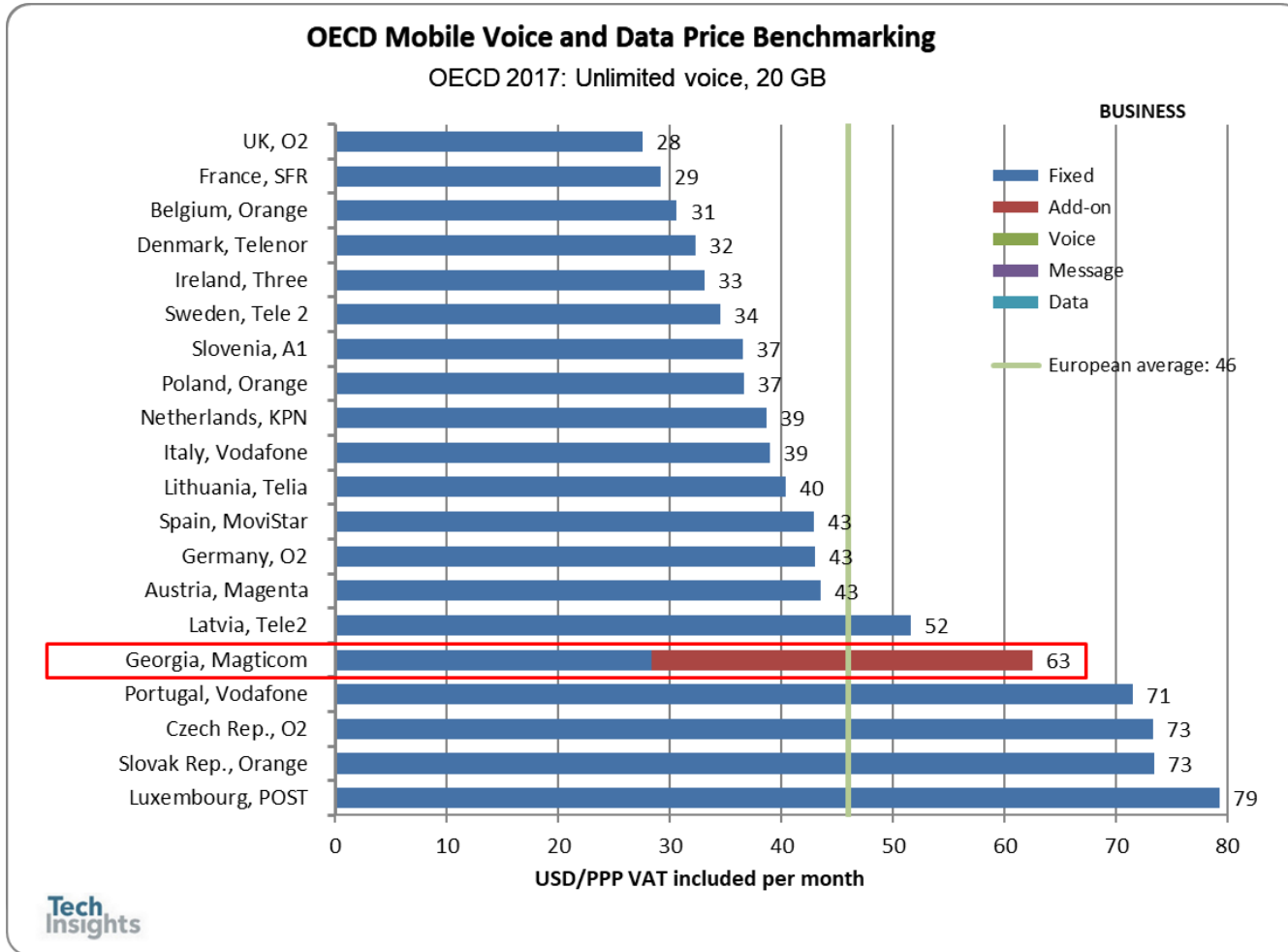
- Although data requirement for this basket is 4 times that of the previous basket (100 calls, 0.5 GB), the cost for Georgia is only slightly more expensive, increasing from USD PPP 12 to USD PPP 15, an increase of less than USD PPP 3.
- Georgia maintains its competitive position of second place, again after Luxembourg, and remains well below the European average of USD PPP 32 and is 54% cheaper.
- As with the previous basket, the Georgian costs for this basket are based on a fixed cost, plus an add-on and separate voice cost.
- The cheapest Georgian operator for this basket is, again, Silknet.

Business mobile voice and data: 300 calls, 5GB data



- For this higher usage basket, the costs for Georgia are still comparatively low, with Georgia sitting in 4th position out of 24 countries.
- The cost for Georgia is below the European average cost of USD PPP 37 and is 32% cheaper than the European average.
- There is a lot of clustering in terms of cost for the low to mid-range, with results for several countries being close to each other in terms of cost.
- The cheapest Georgian operator for this basket is, again, Silknet.

Business mobile voice and data: Unlimited calls, 20GB data



- Like the residential basket result, for this basket, the position of Georgia is less favourable, and a reversal to the lower usage baskets.
- Georgia is fifth most expensive for this basket.
- The cost for Georgia is 36% higher than the European average of USD PPP 46.
- In contrast to the other business baskets, the cheapest Georgian operator for this basket is Magticom, although the cost for Silknet is almost identical at only USD PPP 0.16 more per month.

Mobile data only results

Result observations for residential mobile data only

	Residential - USD PPP inc VAT		Georgia rank (out of 24)	Georgia to European average	No. of subscribers*	% of subscribers
	Georgia	European average				
0.5GB	6	8	9	-25%	78,603	13%
1GB	6	9	6	-35%	11,887	2%
2GB	9	12	9	-25%	159,266	27%
5GB	14	17	8	-21%	131,951	22%
10GB	20	24	11	-14%	28,922	5%
20GB	34	39	11	-13%	7,129	1%
50GB	36	77	9	-53%	173,446	29%

* average monthly number of subscribers of Silknet and Magticom using standalone mobile data

The results for residential data only are very favourable for Georgia, which ranks low to mid-range and is cheaper than the European average for all baskets, with the largest difference being for the 50 GB basket.

The ranking for Georgia is between 6 and 11, with an average ranking of 9 (out of 24)

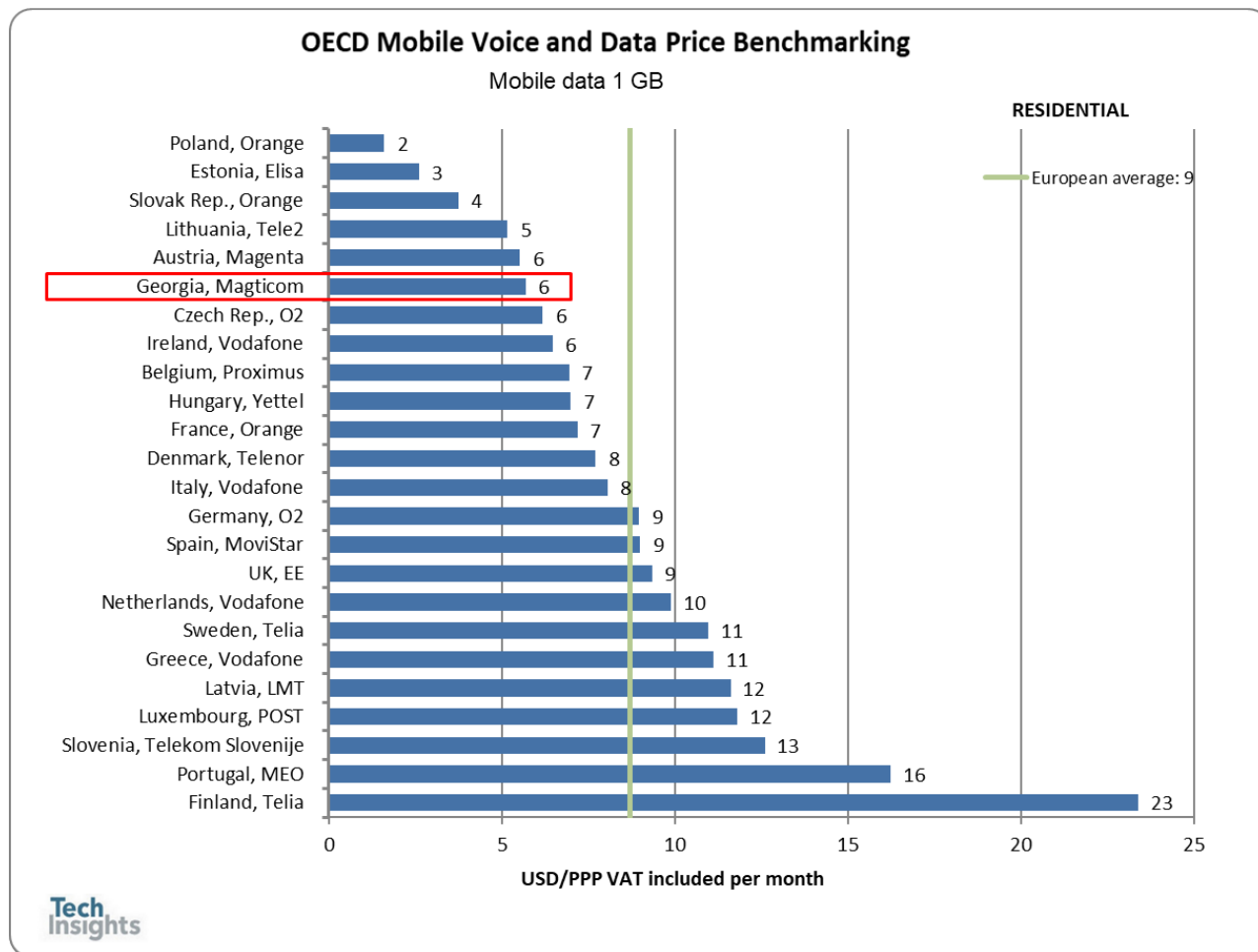
The average cost for Georgia is between 13% and 53% below the European average cost.

It is important to keep these findings in context and exercise care with the interpretation of the results, which are based on the cost of add-on data packages, and do not consider allowances that are included as part of a 'bundled' offering with voice and SMSs.

Some operators in the European comparison countries may have bundled voice, SMS and data tariffs with very large data or unlimited allowances, coupled with limited add-on offerings, that may be less competitively priced. This can encourage users to select bundled tariffs that have an initial larger allowance.

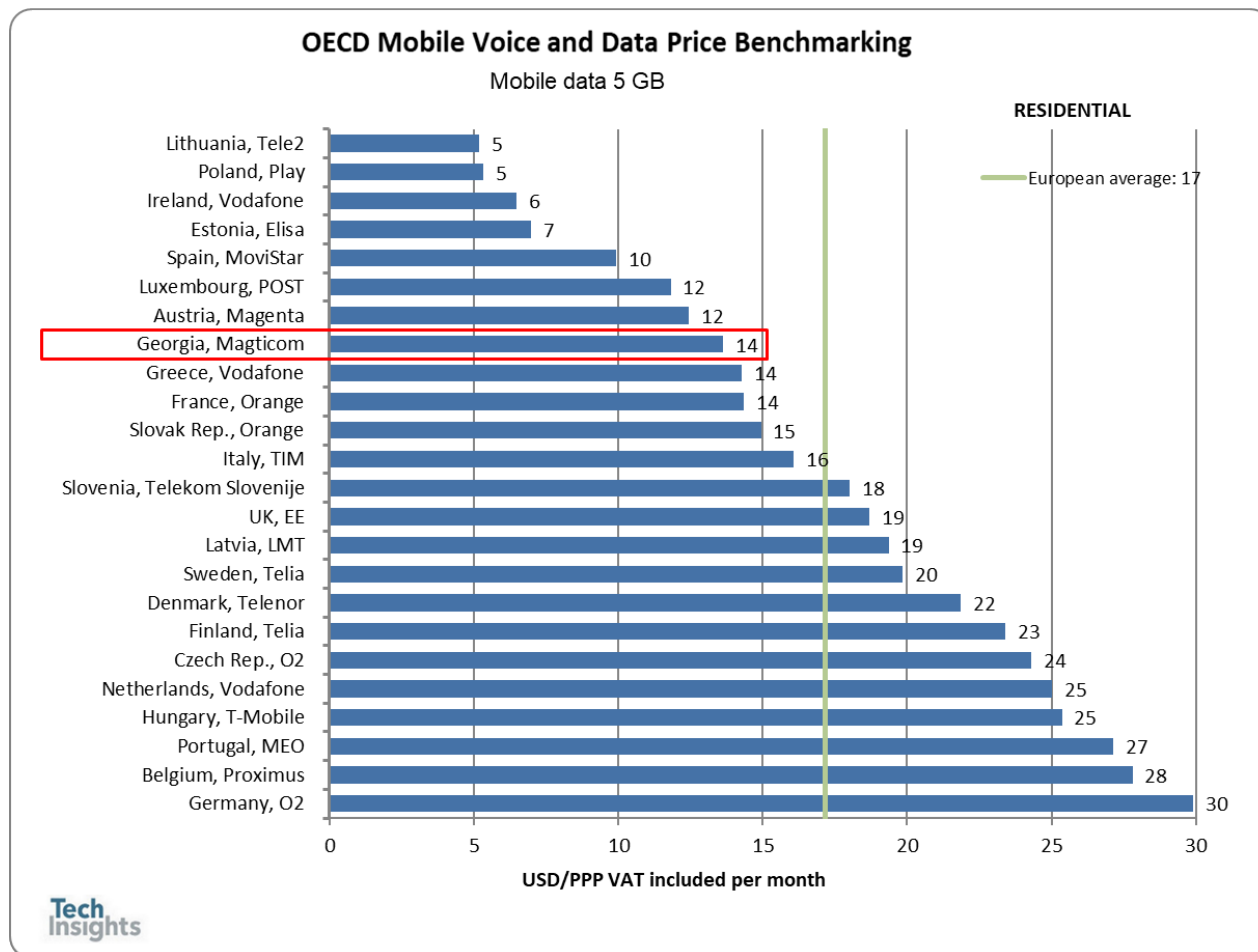
Results for all baskets are shown above; those highlighted in bold are presented in the report. The green highlight indicates that Georgia is at least 15% below the European average, while yellow indicates that Georgia is on par with (within + or - 15%) the European average.

Residential mobile data only: 1GB



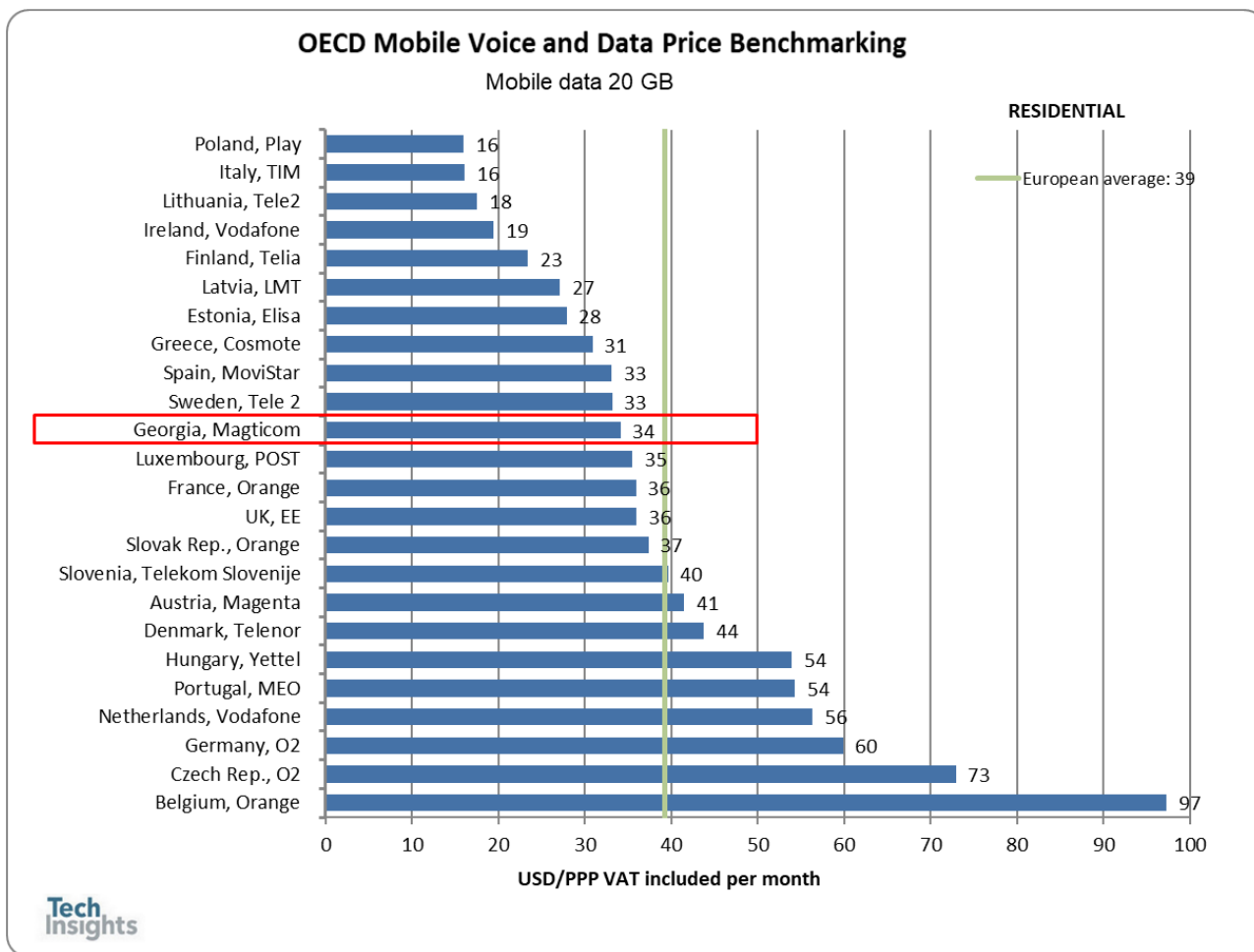
- For the 1GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 6 per month, which sits below the European average of USD PPP 9 per month.
- The cost of add-ons for this basket ranges from very low – USD PPP 2 –for Poland, to USD PPP 23 for Finland.
- Georgia ranks in 6th position across Europe in terms of cost.
- It is 35% cheaper than the European average for this basket.

Residential mobile data only: 5GB



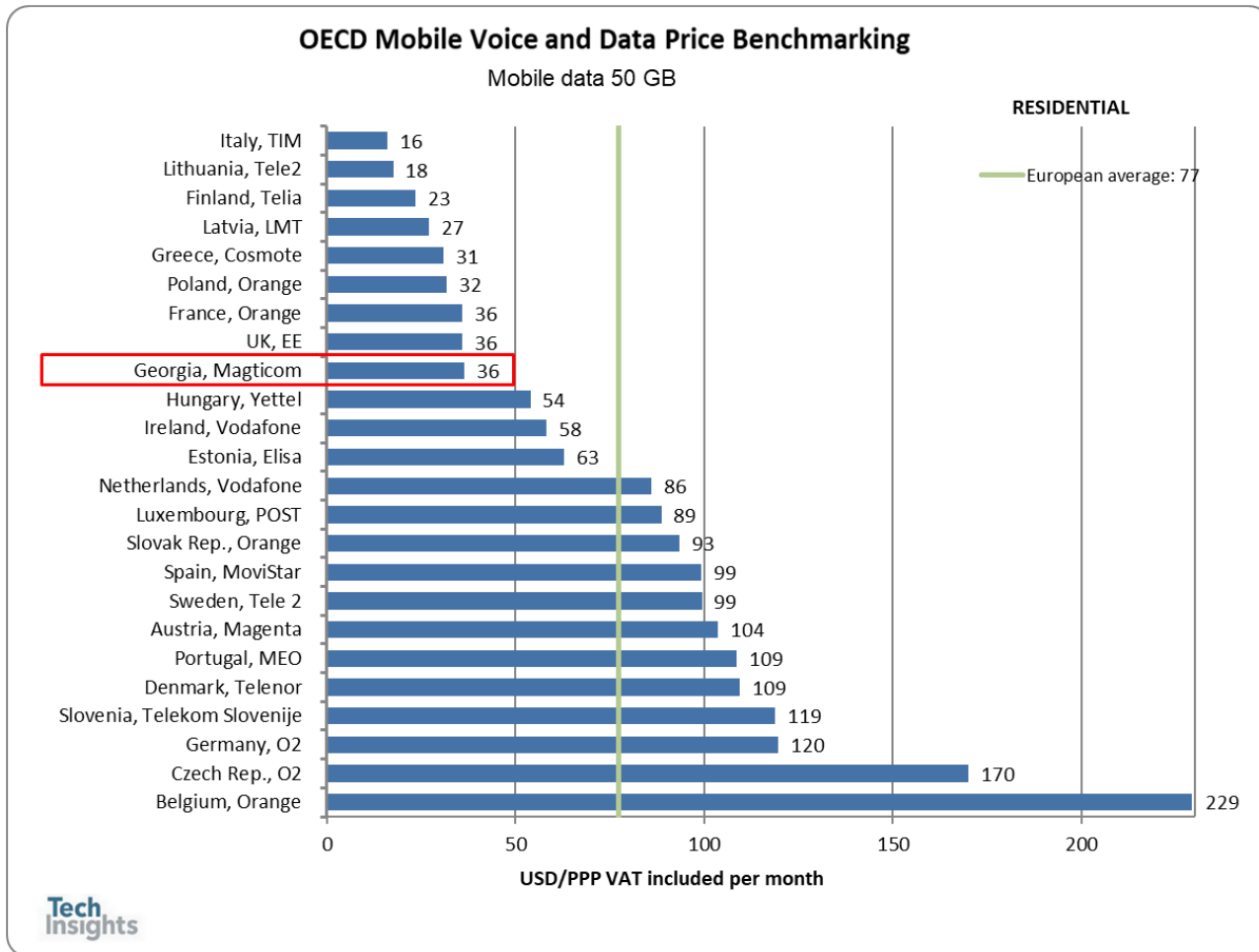
- For the 5GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 14 per month, which sits below the European average.
- The cost of add-ons for this basket ranges from low – USD PPP 5 for Lithuania, to USD PPP 30 for Germany.
- Georgia ranks in 8th position across Europe in terms of cost.
- It is 21% cheaper than the European average for this basket.

Residential mobile data only: 20GB



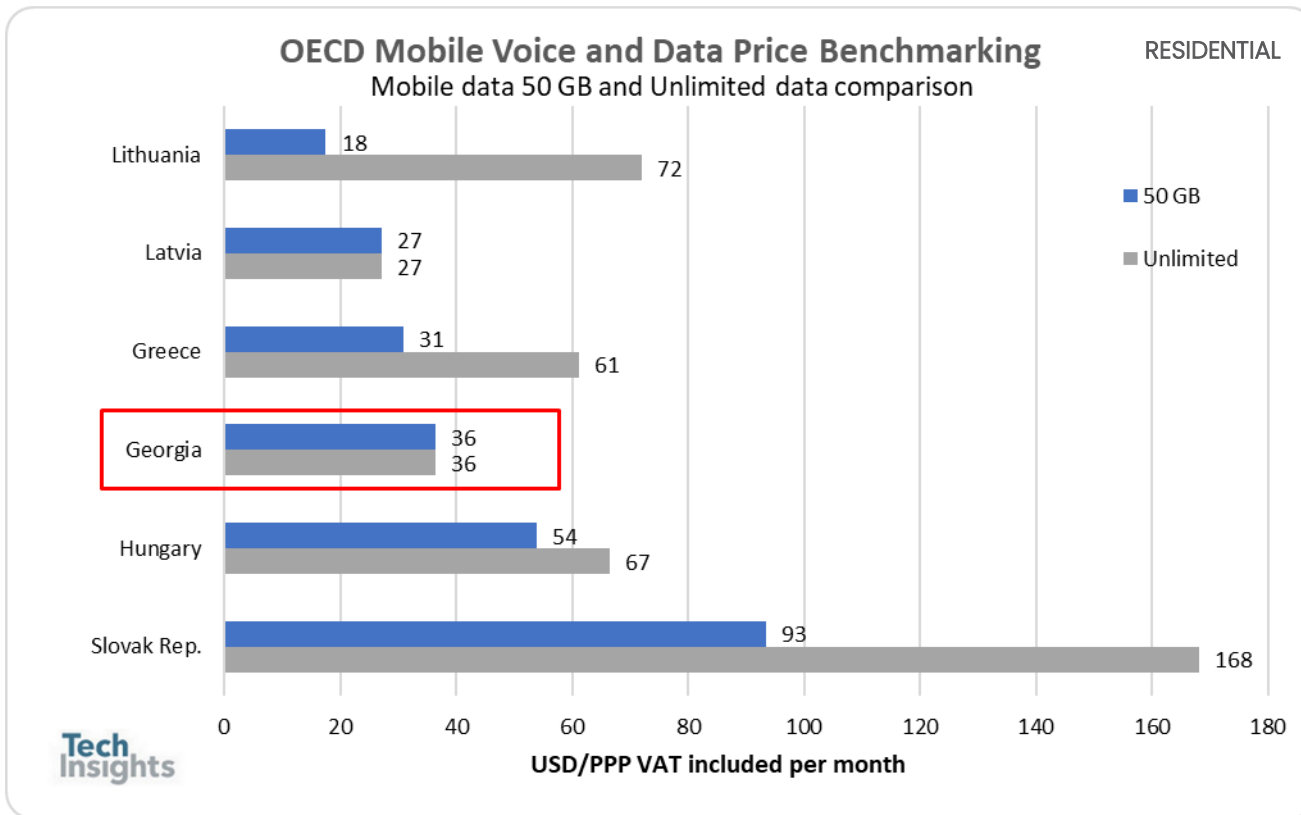
- For the 20GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 34 per month, which sits below the European average of USD PPP 39 per month.
- The cost of add-ons for this basket ranges from USD PPP 16 for Poland, to USD PPP 97 for Belgium.
- Georgia ranks in 11th position across Europe in terms of cost.
- It is 13% cheaper than the European average for this basket.
- The range of prices as data increases is much broader.
- It is important to keep in mind that operators typically offer a range of tariffs that include large data allowances, and unlimited data, and add-on data allowances are required to a lesser degree by consumers.

Residential mobile data only: 50GB



- For the 50GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 36 per month, which sits below the European average of USD PPP 77 per month.
- The cost of add-ons for this basket ranges from low – USD PPP 16 for Italy, to USD PPP 229 for Belgium
 - The cost of add-on data in Belgium has been historically high, especially for larger data allowances.
- Georgia ranks in 9th position across Europe in terms of cost.
- It is 53% cheaper than the European average for this basket.
- The range of prices as data increases is much broader.
- It is important to keep in mind that operators typically offer a range of tariffs that include large data allowances, and unlimited data, and add-on data allowances are required to a lesser degree by consumers

Residential mobile data only: comparing 50GB and unlimited



- Although the maximum basket specified in the analysis is for 50GB, an additional analysis of unlimited data add-on packages for residential users was prepared and compared against 50GB packages.
- The availability of unlimited add-on data packages in Europe is very limited, with only a few providers offering unlimited add-on data
 - Rather, many providers include unlimited data as part of a bundled offering, along with voice and SMS
 - For a very small number of providers, unlimited data add-ons are offered but pricing is not published
- Where pricing is available, in most cases, the cost of an unlimited data add-on is much higher than the cost of at 50 GB add-on
 - Ranging from 23% to 310% higher
- In the case of Georgia and Latvia, there is no cost difference
 - i.e. the 50 GB basket is fulfilled by an unlimited data add-on

Ranking

Lithuania		Latvia		Greece		Georgia		Hungary		Slovak Rep.	
50GB	Unlimited	50GB	Unlimited	50GB	Unlimited	50GB	Unlimited	50GB	Unlimited	50GB	Unlimited
1	5	2	1	3	3	4	2	5	4	6	6

Result observations for business mobile data only

	Business - USD PPP inc VAT		Georgia rank (out of 21)	Georgia to European average
	Georgia	European average		
0.5GB	6	12	5	-53%
1GB	6	13	3	-56%
2GB	8	16	4	-51%
5GB	13	24	5	-48%
10GB	17	34	2	-49%
20GB	34	57	5	-40%
50GB	68	124	4	-45%

The results for business data only are very favourable for Georgia, and more so than for residential pricing, and the ranking for Georgia is between 2 and 5, with an average ranking of 4 (out of 21)

The average cost of add-on business data in Georgia is significantly below the European average for all baskets.

The cost for Georgia is between 40%-56 % lower than the average cost for Europe.

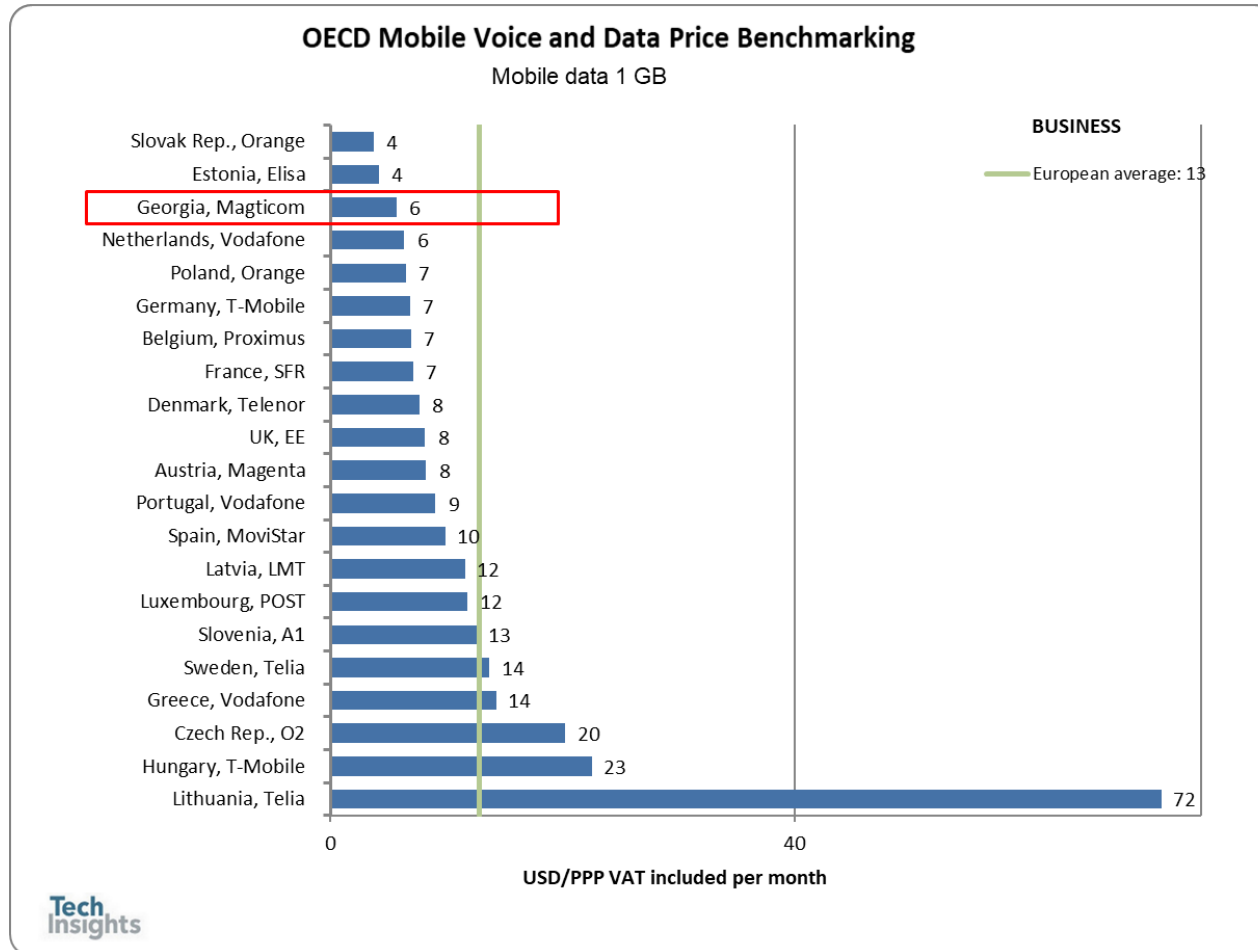
It is important to keep these findings in context and exercise care with the interpretation of the results, which are based on the cost of add-on data packages, and do not consider allowances that are included as part of a 'bundled' offering with voice and SMSs.

The findings cannot be considered an indication of the cost an end user will pay for their mobile usage

Some operators in the European comparison countries may have bundled voice, SMS and data tariffs with very large data or unlimited allowances, coupled with limited add-on offerings, that may be less competitively priced. This can encourage users to select bundled tariffs that have an initial larger allowance.

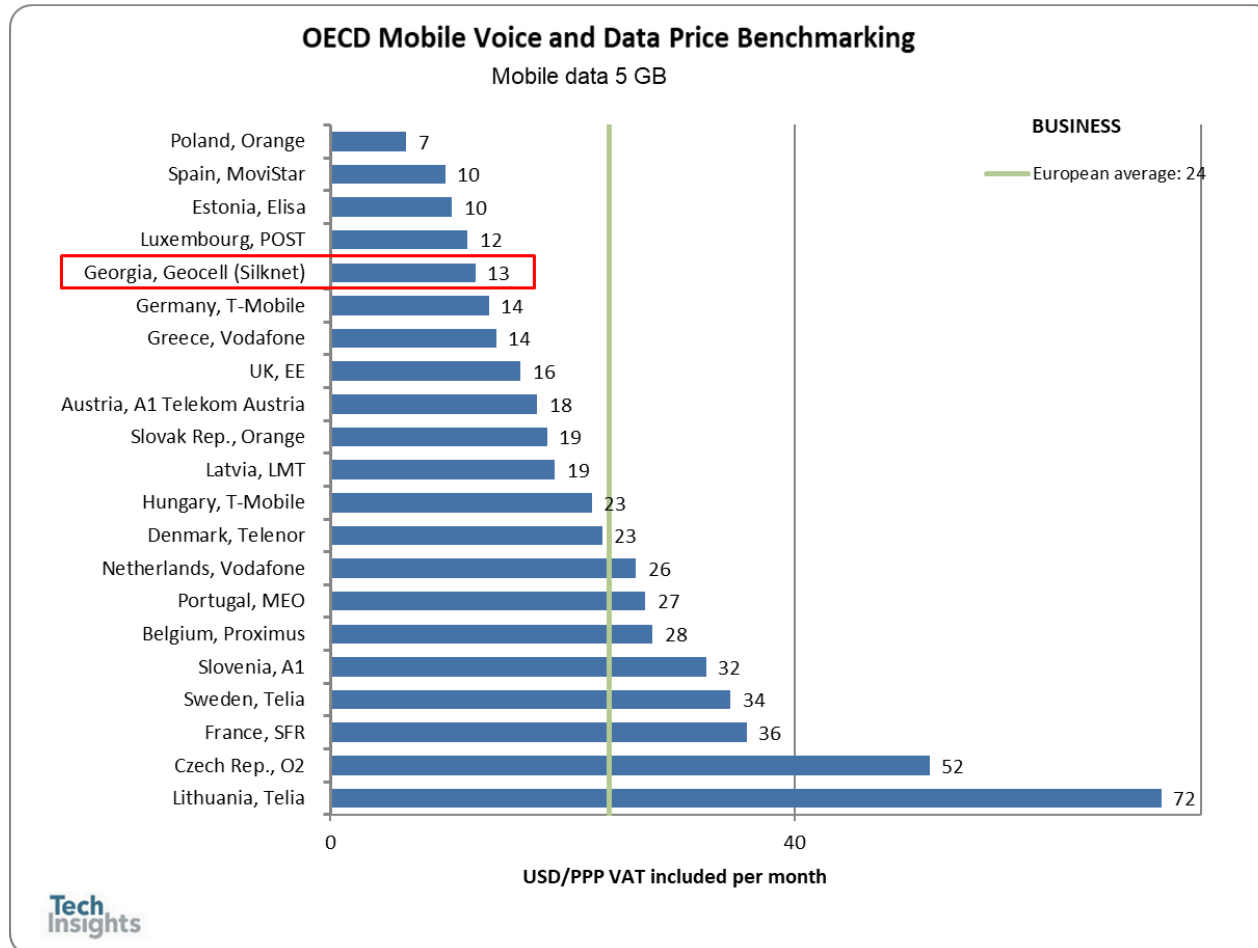
Results for all baskets are shown above; those highlighted in bold are presented in the report. The green highlight indicates that Georgia is at least 15% below the European average.

Business mobile data only: 1GB



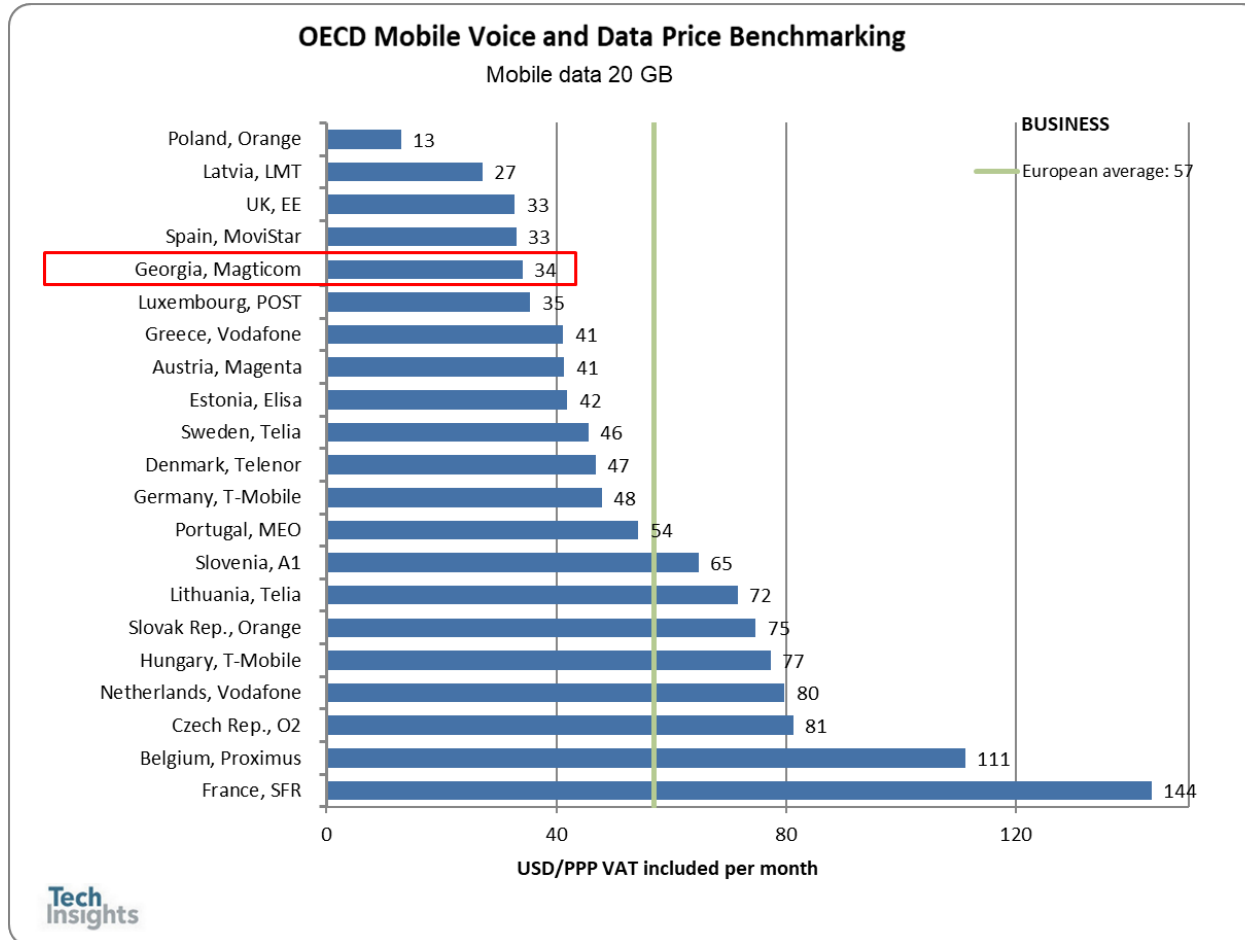
- For the 1GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 6 per month, which sits below the European average of USD PPP 13 per month.
 - Magticom and Silknet have identically priced offers for this basket.
- The cost of add-ons for this basket ranges from the very low – USD PPP 4 for Slovakia, to USD PPP 72 for Lithuania
 - The add-on data for Lithuania is an unlimited data add-on at a relatively high cost. There are no other add-ons for business pricing, hence the high cost here.
- Georgia ranks in 3rd position across Europe in terms of cost.
- It is 56% cheaper than the European average for this basket.
 - The average cost for Europe has been driven up by the cost for Lithuania

Business mobile data only: 5GB



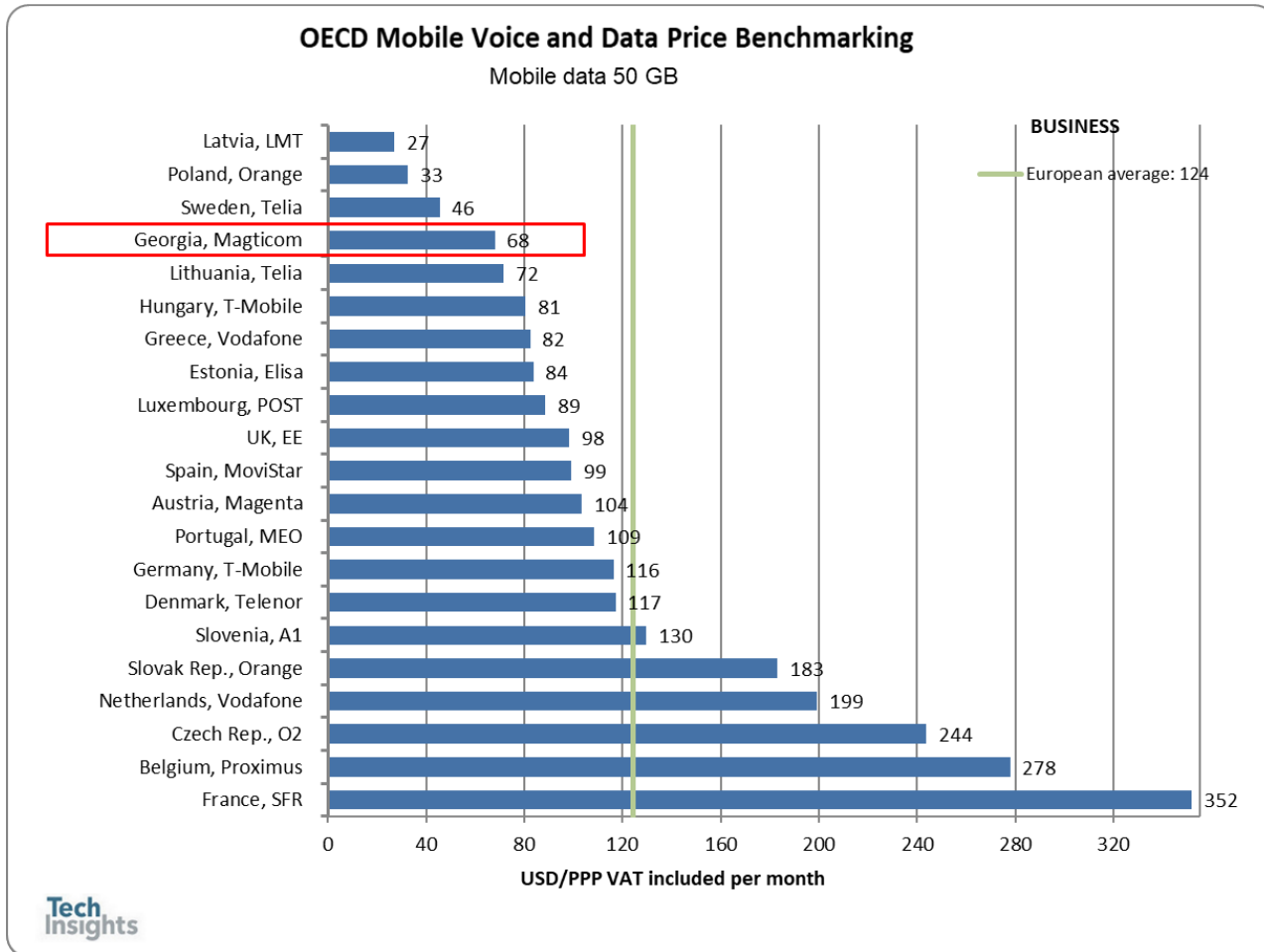
- For the 5GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 13 per month, which sits below the European average of USD PPP 24 per month.
- The cost of add-ons for this basket ranges from USD PPP 7 for Poland, to USD PPP 72 for Lithuania
 - As in the 1GB basket, the add-on data for Lithuania is an unlimited data add-on at a relatively high cost. There are no other add-ons for business pricing, hence the high cost here.
- Georgia ranks in 5th position across Europe in terms of cost.
- It is 48% cheaper than the European average for this basket.
 - The average cost for Europe has been driven up in part by the cost for Lithuania, however as the data requirement increases so does the cost across several countries, helping further push up the average cost.

Business mobile data only: 20GB



- For the 20GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 34 per month, which sits below the European average of USD PPP 57 per month. Magticom and Silknet have identically priced offers for this basket.
- The cost of add-ons for this basket ranges from USD PPP 13 for Poland, to USD PPP 144 for France.
- Georgia ranks in 5th position across Europe in terms of cost.
- It is 40% cheaper than the European average for this basket.
- The range of prices as data increases is much broader.
 - Business pricing is generally more expensive than residential pricing
- Note: operators typically offer a range of tariffs with large data allowances and unlimited data, and add-on data allowances are required to a lesser degree by users, hence the very high cost in some countries.

Business mobile data only: 50GB



- For the 50GB data only basket, the cheapest cost for a data add-on for Georgia is USD PPP 68 per month, which sits below the European average of USD PPP 124 per month.
- The cost of add-ons for this basket ranges dramatically across Europe.
 - Business pricing is generally more expensive than residential pricing
 - Operators typically offer a range of tariffs that include large data allowances and unlimited data, and add-on data allowances are required to a lesser degree by consumers, hence the very high cost in some countries
- Georgia ranks in 4th position across Europe in terms of cost.
- It is 45% cheaper than the European average for this basket.

Fixed broadband results

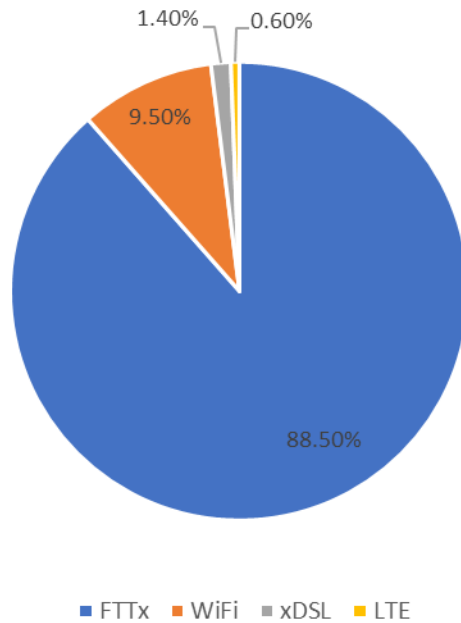
Fixed broadband usage in Georgia, by technology

The graphs below show the usage of fixed broadband by technology type in Georgia, for both residential and business users.

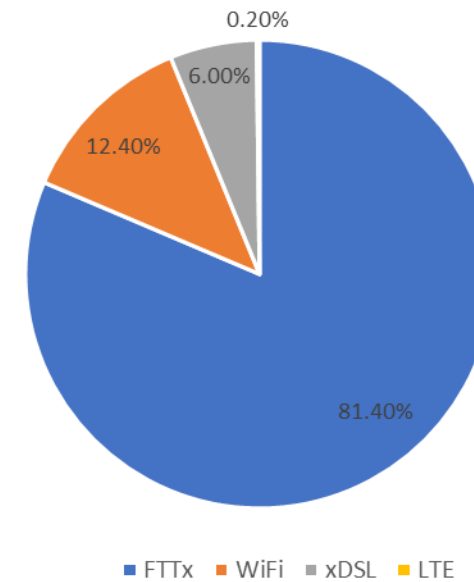
Fibre services dominate for both user groups, with the second most featured technology being WiFi-based services.

xDSL residential usage in Georgia is very low, while business subscriber use a higher proportion of xDSL services, albeit still a modest 6% in total.

Residential fixed broadband use in Georgia, by technology



Business fixed broadband use in Georgia, by technology



Result observations for residential fixed broadband

		Residential - USD PPP inc VAT			Georgia Tbilisi rank (out of 24)	Georgia Regions rank (out of 24)	Georgia Tbilisi to European average	Georgia Regions to European average	Number of subscribers*	% of subscribers
		Georgia Tbilisi	Georgia Regions	European average						
Fixed broadband	>= 0.25 Mb/s, 15GB	28	28	36	6	6	-23%	-23%	130	0%
All technologies	>= 10 Mb/s, 30GB	28	34	37	7	11	-23%	-7%	5,093	2%
	>= 25 Mb/s, 60GB	39	34	39	15	8	1%	-12%	207,417	96%
	>= 100 Mb/s, 120GB	112	112	46	24	25	145%	145%	4,336	2%
Fixed broadband	>= 0.25 Mb/s, 15GB	39	34	40	13	9	-3%	-16%	128	0%
Fibre only	>= 10 Mb/s, 30GB	39	34	40	13	9	-3%	-16%	193	0%
	>= 25 Mb/s, 60GB	39	34	41	13	6	-5%	-17%	206,590	98%
	>= 100 Mb/s, 120GB	112	112	47	24	24	136%	136%	4,336	2%

* average monthly number of subscribers of Silknet and Magticom using standalone fixed broadband.

While Georgia sits well below the European average for the two lowest speed baskets, as the basket speed increases, the competitive position of Georgia decreases, and for the 100 Mb/s basket, Georgia is the most expensive overall. This trend of declining competitiveness as speed increases is seen for results based on all technologies and on fibre services only.

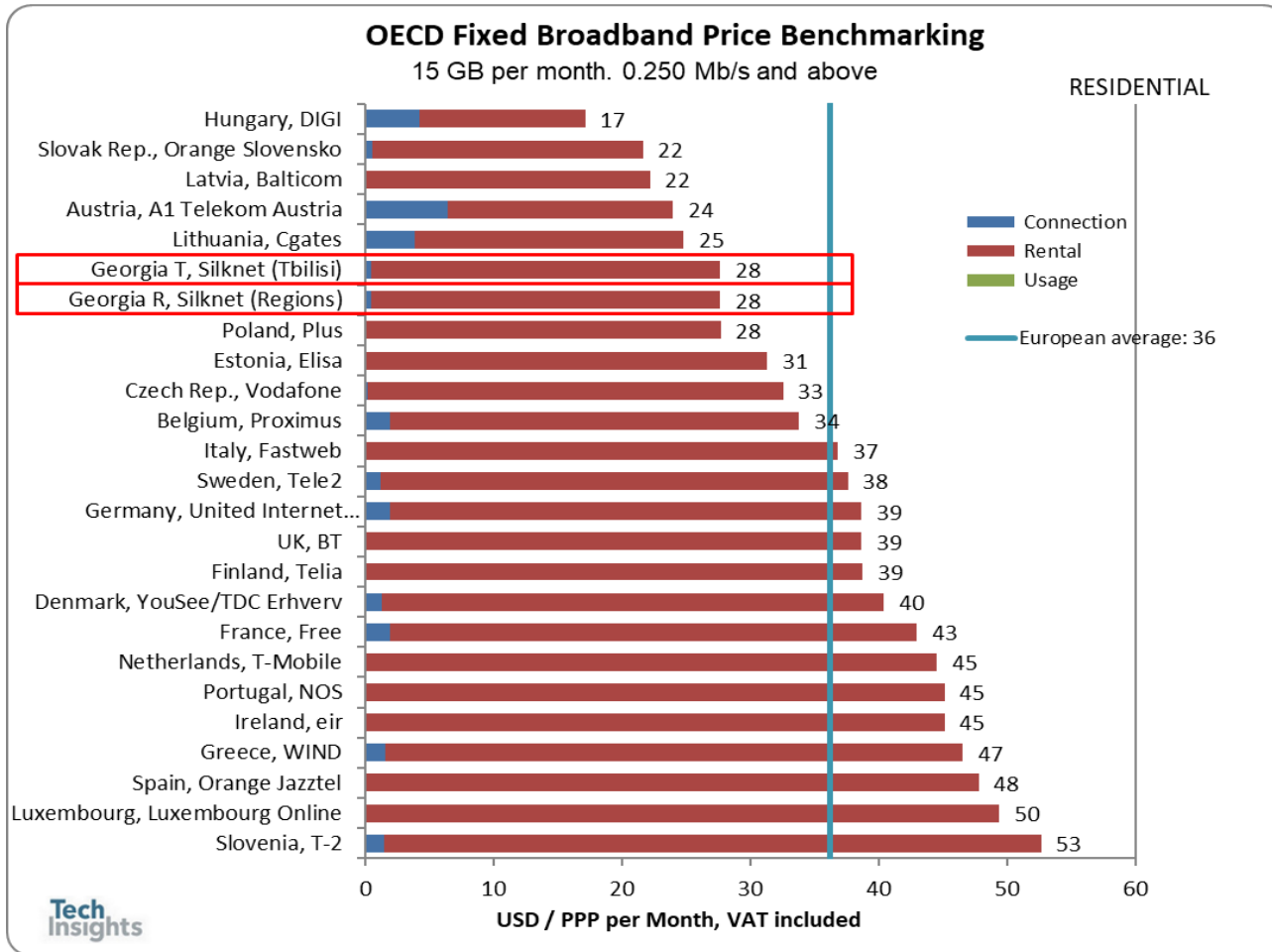
Most users in Georgia will subscribe to lower speed services, as high speeds are very expensive. At the end of 2022, only 1% of Georgian users subscribed to a fixed broadband services (bundles and standalone, 2% for only standalone) at 100 Mb/s or above, compared to 55% in Europe (on average), ranging from 20% for Greece to 87% for Spain (European data source: DESI 2023 Indicators, EC Europa). The very low numbers taking higher speed services in Georgia is driven by the very high prices for high speed, which see Georgia as the most expensive for the highest speed basket for which results are available. Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia.

There is a degree of variation between pricing in Tbilisi and other regions; Pricing in the regions is generally more favourable than Tbilisi pricing. Where this is true, pricing the regions can be up to 13% cheaper than pricing for Tbilisi.

Results for all baskets are shown above; those highlighted in bold are presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

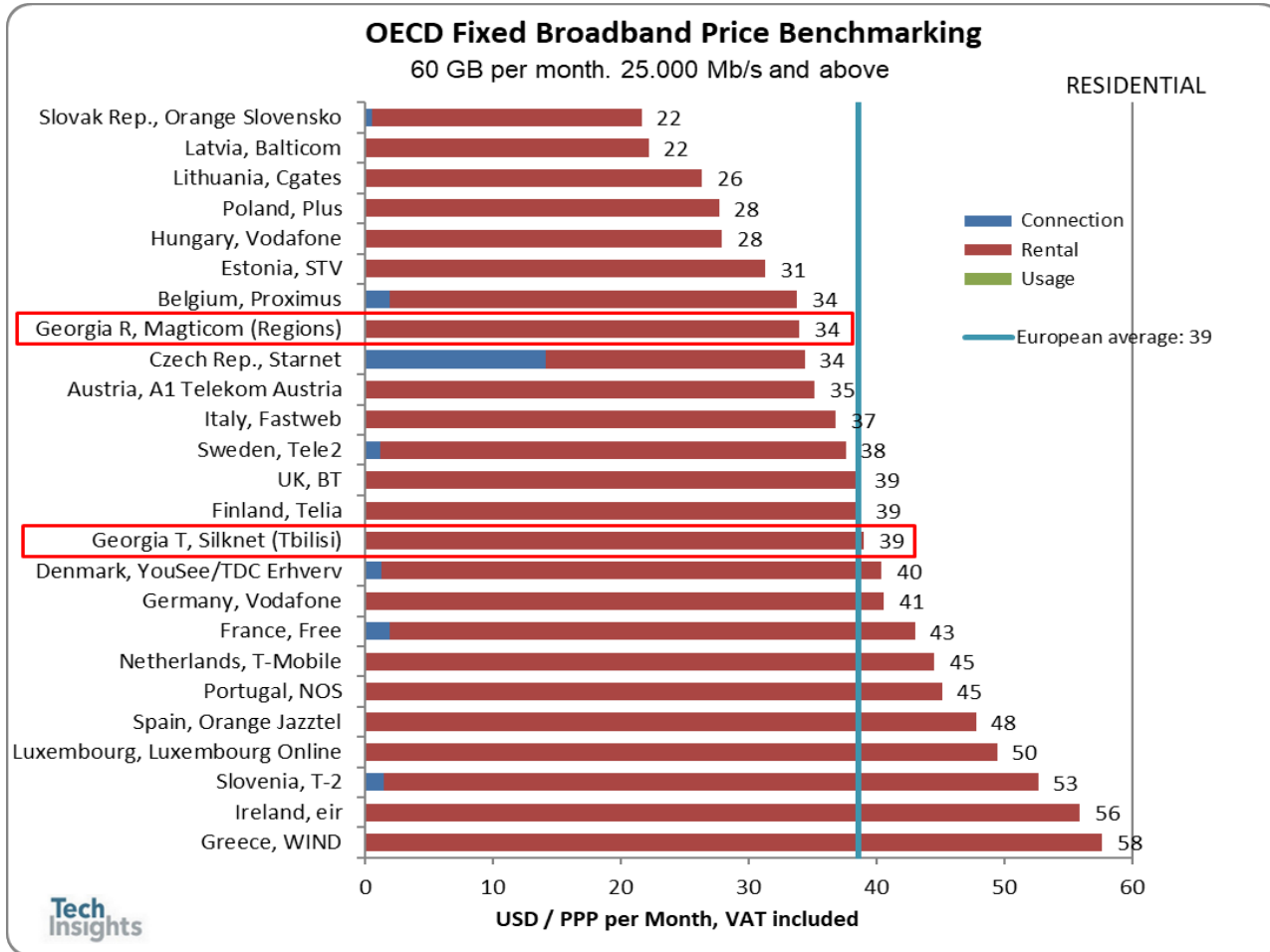
The results consider the medium usage set of OECD baskets for selected speeds. As most services offer unlimited broadband, the results for the low and high usage baskets for fixed broadband will be identical or near-identical.

Residential fixed broadband: 0.25 Mb/s 15GB, all technologies



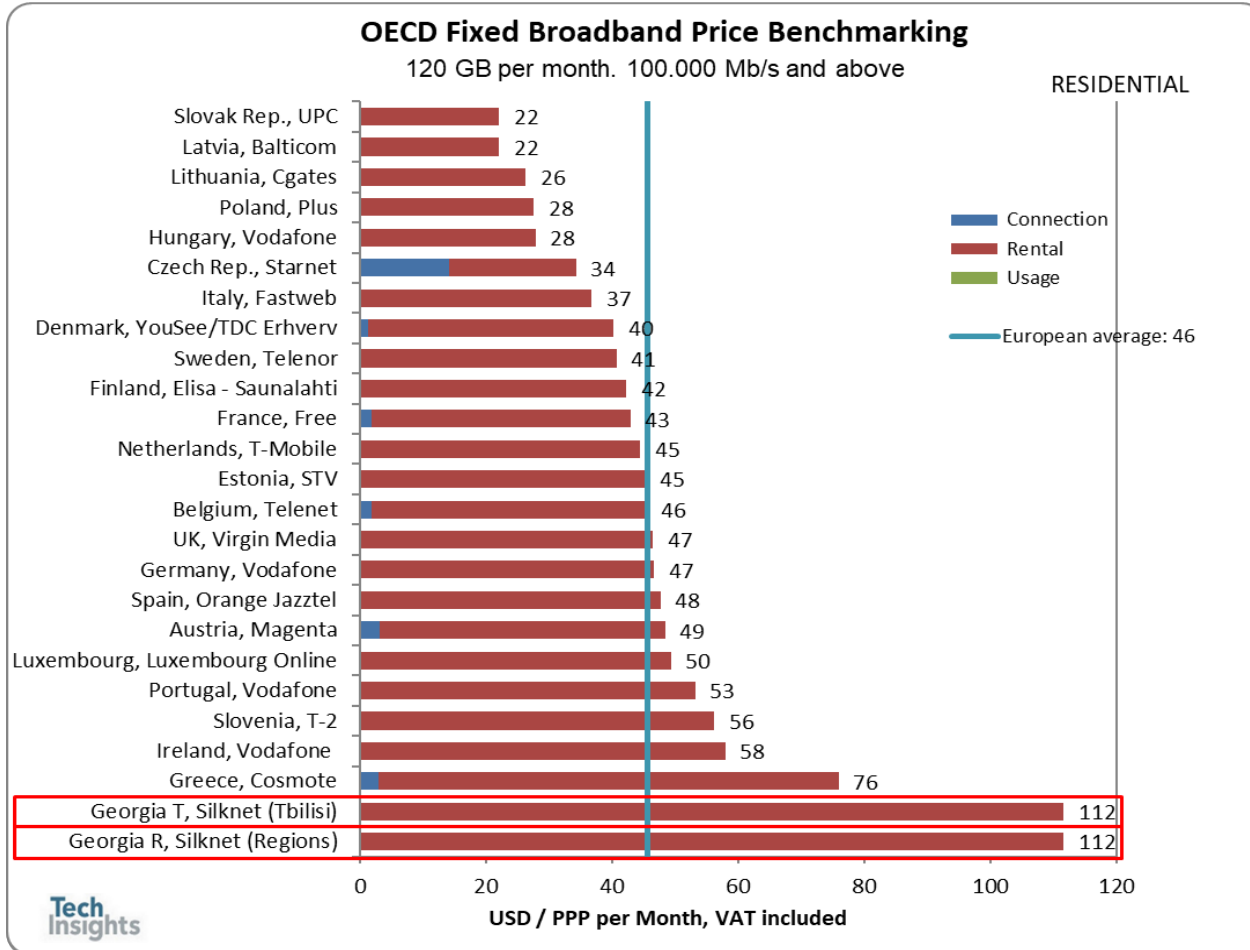
- The 0.25 Mb/s basket covers all available fixed broadband services, as it is the minimum definition for a broadband service.
- For this basket, Georgia sits in the lower (cheaper) end across the comparator countries.
- It also sits well below the European average of 36 USD PPP, i.e., lower cost.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia.
- For both results for Georgia, Silknet is the cheapest provider.
- Silknet offerings are based on DSL.
- Usage charges do not feature in any of the results – many providers have moved away from usage-based pricing for fixed broadband.

Residential fixed broadband: 25 Mb/s 60GB, all technologies



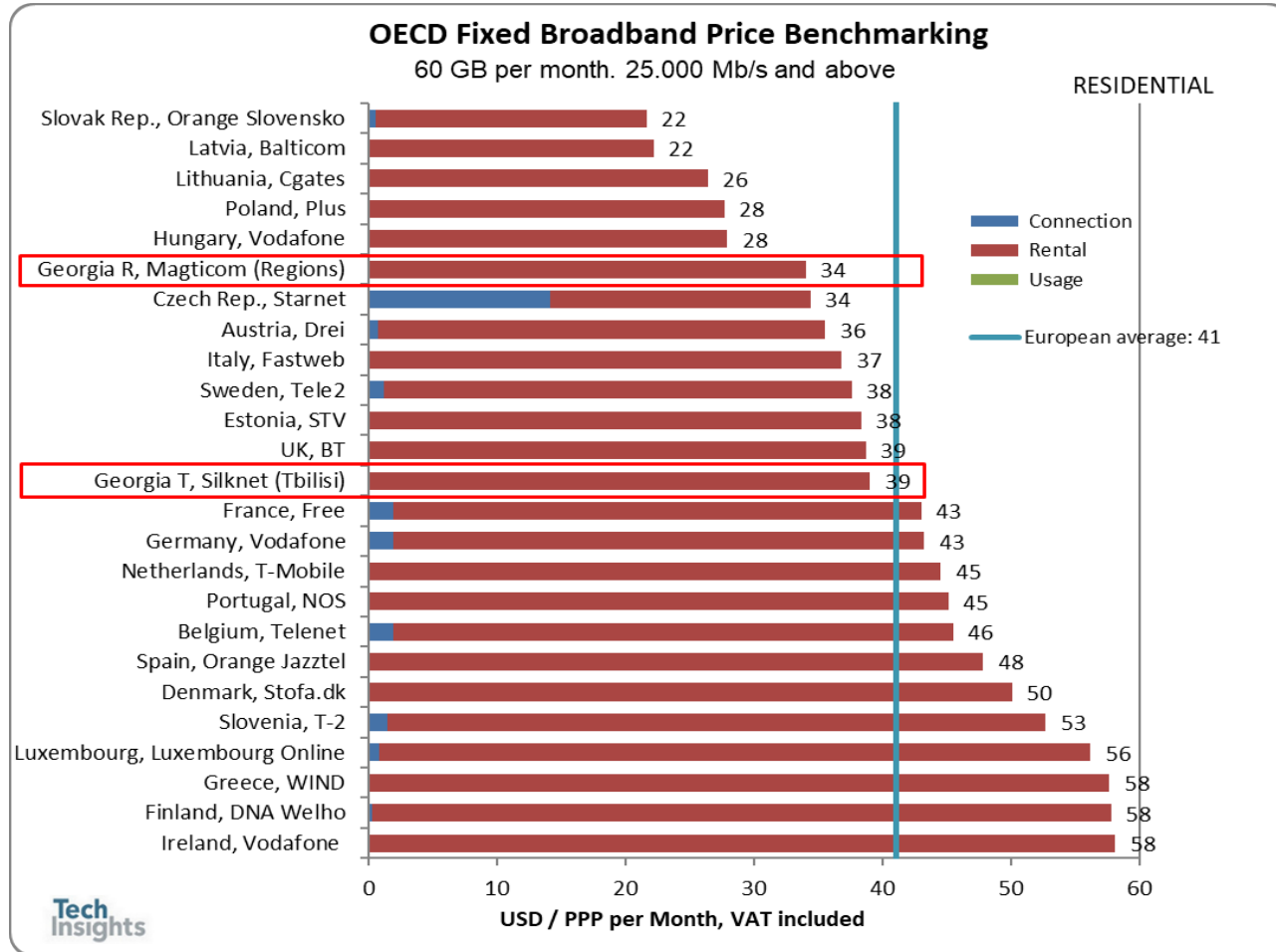
- The 25 Mb/s basket is the mid speed of service presented in this report and is widely available across all countries.
- For this basket, the position of Georgia varies depending on whether the pricing is for regions outside of Tbilisi or for Tbilisi itself.
- At USD PPP 34, regional pricing, based on Magticom, sits below the European average of 39, and is 8th cheapest across the comparator countries.
- Pricing for Tbilisi, which is based on Silknet pricing, is less favourable, sitting mid-range and slightly above the European average of 39 USD PPP, i.e., higher cost.
 - The European average is based on the average of the cheapest result per country. For Georgia, the cheapest overall result is used.
- The offers for both Magticom and Silknet offering are based on fibre.

Residential fixed broadband: 100 Mb/s 120GB, all technologies



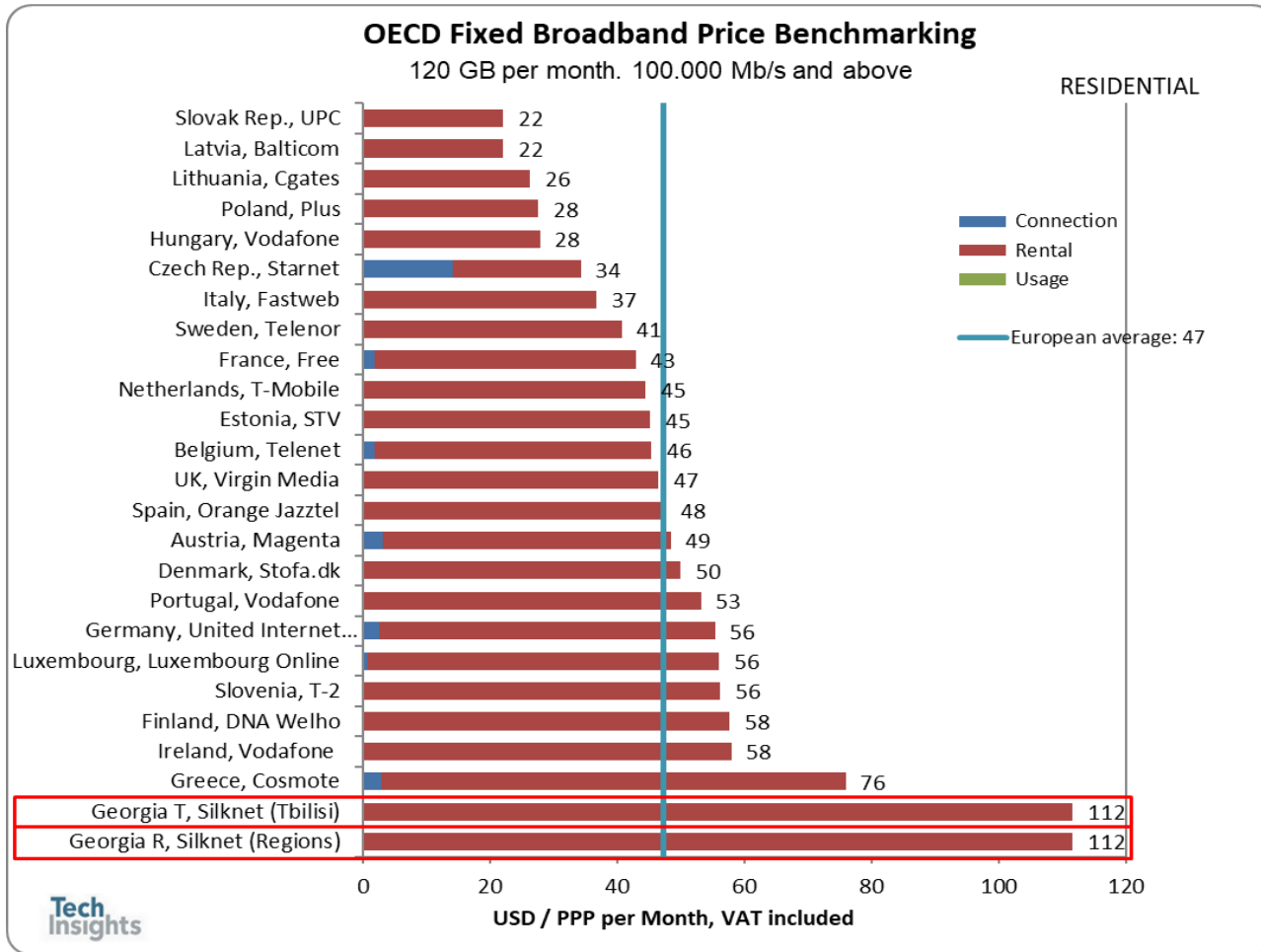
- The 100 Mb/s basket covers higher speed fixed broadband services.
 - Note, for Georgia, this is the maximum speed of service available for residential users.
- For this basket, as with the 25 Mb/s basket, Georgia is positioned less favourably, and is the most expensive compared to the other European countries.
- It also sits some way above the European average of 46 USD PPP, i.e., higher cost.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia..
- For both results for Georgia, Silknet is the cheapest provider
- The offers for Silknet are based on fibre.

Residential fixed broadband: 25 Mb/s 60GB, fibre only



- The results shown here are for the 25 Mb/s basket, based on fibre only services..
- The results for this basket are almost identical to the 25 Mb/s basket based on all technologies – this is because most of the cheapest results for this basket are based on fibre services.
- Similar to the ‘all technologies’ result, the position of Georgia varies depending on whether the pricing is for regions outside of Tbilisi or for Tbilisi itself, although for fibre-only services, both results for Georgia sit below the European average of 41 USD PPP.
- The regional pricing result for Georgia for this basket, based on Magticom pricing, is more favourable, sitting in 6th position across the comparator countries.
- The result for Tbilisi, based on Silknet pricing, sits much closer to the average.
 - The European average is based on the average of the cheapest result per country. For Georgia, the cheapest overall result is used.

Residential fixed broadband: 100 Mb/s 120GB, fibre only



- The 100 Mb/s fibre only basket covers higher speed fixed broadband services.
 - Note, for Georgia, this is the maximum speed of service available for residential users.
- For this basket, as with the 100 Mb/s basket based on all technologies, Georgia is positioned less favourably, and is the most expensive compared to the other European countries.
 - This is unsurprising as for most of the countries, including Georgia, the results based on all technologies are virtually identical to the fibre only results, as most services at this speed are fibre services
- Georgia sits some way above the European average of 47 USD PPP, i.e., higher cost.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia..
- For both sets of results for Georgia, Silknet is the cheapest provider

Result observations for business fixed broadband

		Business - USD PPP inc VAT			Georgia Tbilisi rank	Georgia Tbilisi rank	Georgia Tbilisi to	Georgia Regions to	Number of	% of
		Georgia Tbilisi	Georgia Regions	European average	(out of 24 (23 for	(out of 24 (23 for	European average	European average	subscribers*	subscribers
Fixed broadband	>= 0.25 Mb/s, 15GB	30	30	43	4	5	-30%	-30%	14,580	48%
All technologies	>= 10 Mb/s, 30GB	38	38	44	7	8	-12%	-12%	2,731	9%
	>= 25 Mb/s, 60GB	48	48	47	12	13	0%	0%	1,632	5%
Fixed broadband	>= 0.25 Mb/s, 15GB	65	65	53	18	19	24%	24%	12,783	45%
Fibre only	>= 10 Mb/s, 30GB	165	165	57	22	23	189%	189%	2,510	9%

* average monthly number of business subscribers of Silknet and Magticom. Around 17,000 business subscribers use nonstandard offers that are not presented on the slide

Business services in Georgia for which prices are publicly available are generally very modest speeds – up to 10 Mb/s for services based on fixed (fibre-based) connections, and up to 50 Mb/s for LTE-based services (although these are rarely subscribed to). Beyond this speed, prices and services are agreed case-by-case, and high-speed standard business offers are not transparent on the market.

For fibre-only prices, which are used by most business users, Georgia pricing is above the European average for the two baskets for which prices are published, and for the highest speed basket is overall most expensive. There are no prices published for speeds of 25 Mb/s or above.

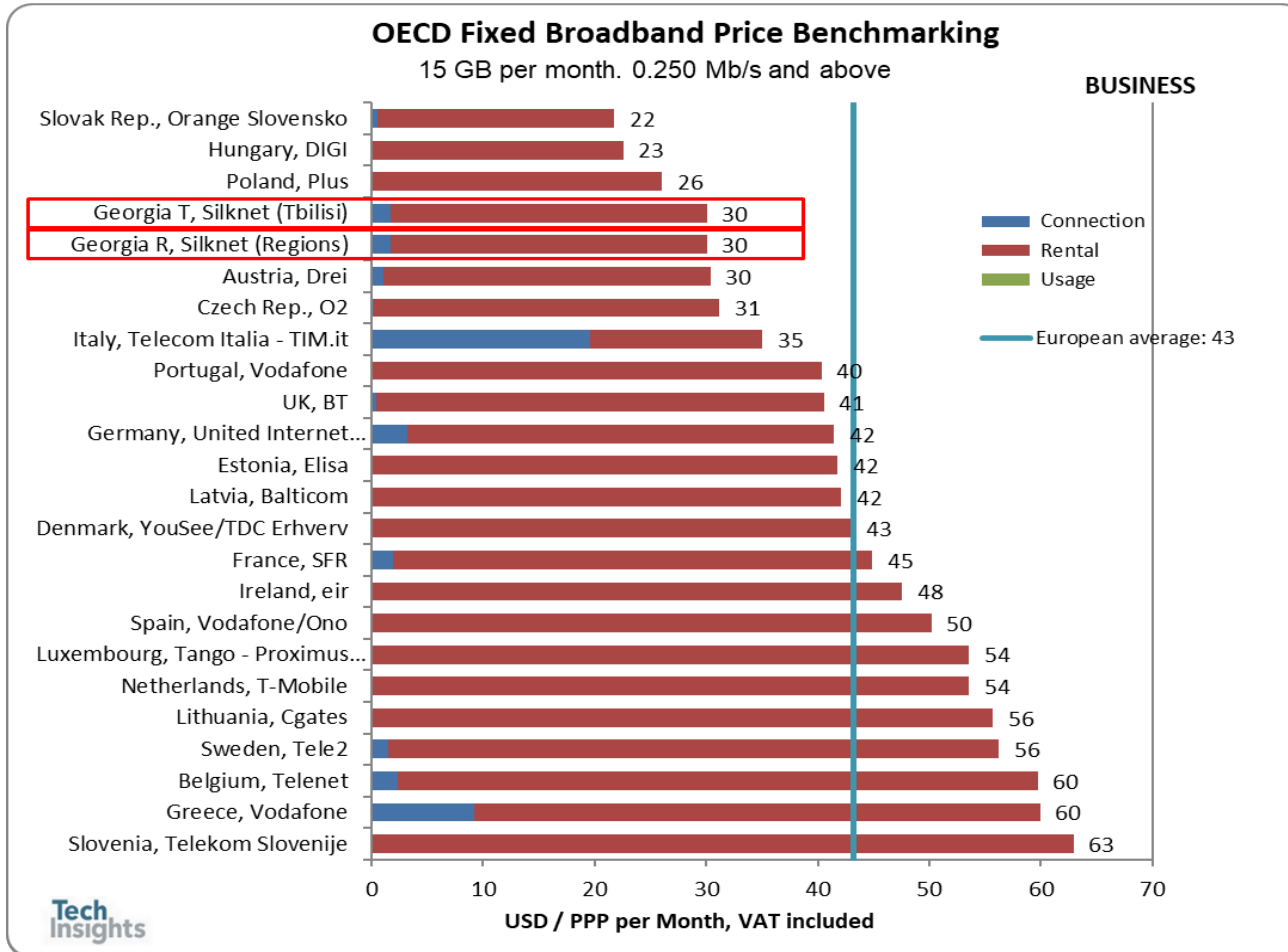
When all technologies considered, Georgia is very close to the European average for the 25 Mb/s basket, with the result based on an LTE-based service, while the lower speed baskets show Georgia as more favourable. Note, however, that subscribers taking LTE-based business services account for less than 1% of business broadband users.

There is no distinction between pricing in Tbilisi and in the Regions.

Results for all baskets are shown above; and are also presented in the report. Green highlight indicates that Georgia is at least 15% below the European average; yellow indicates that Georgia is on par with (within + or - 15%), and red at least 15% more expensive than the European average.

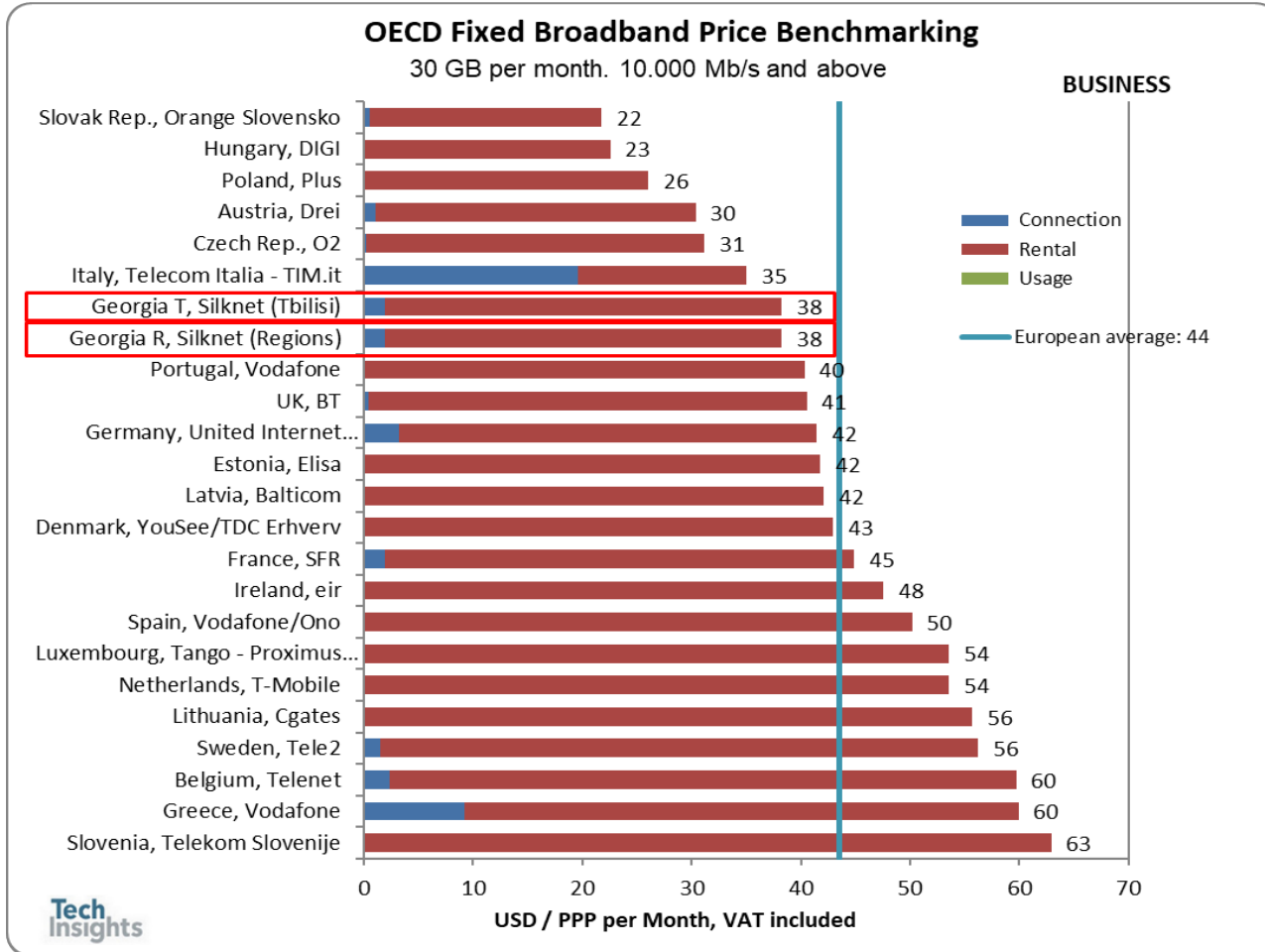
The results consider the medium usage set of OECD baskets for selected speeds. Like residential broadband, as most services offer unlimited broadband, the results for the low and high usage baskets for fixed broadband will be identical or near-identical.

Business fixed broadband: 0.25 Mb/s 15GB, all technologies



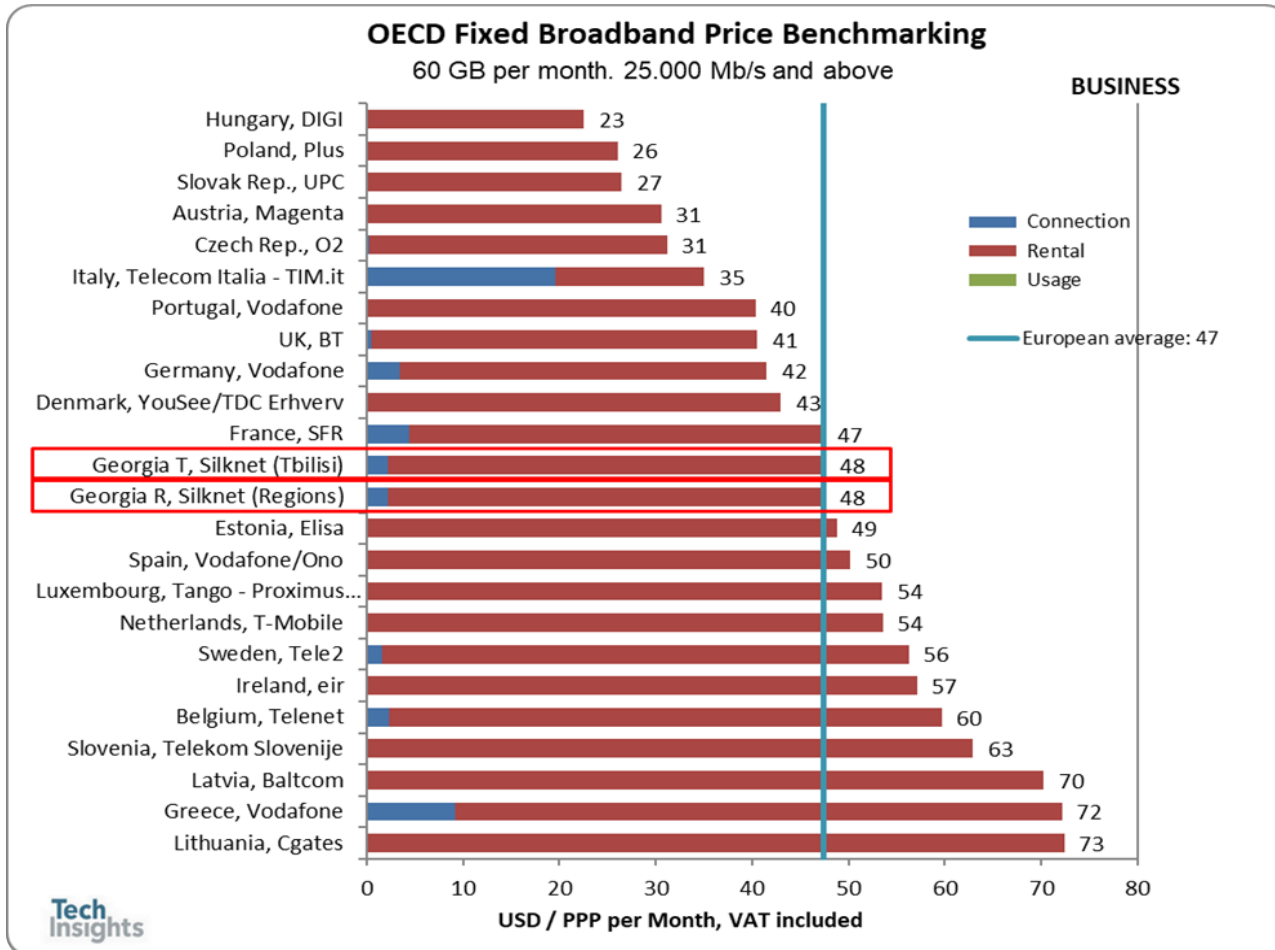
- For the lowest speed, 0.25 Mb/s basket based on business tariffs, Georgia sits in 4th position across the 24 European countries.
- It is 30% below the average of 43 USD PPP.
 - Like the residential results, the European average is based on the average of the cheapest result per country. For Georgia, the cheapest overall result is used.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia.
- For both results for Georgia, Silknet is the cheapest provider.
- The Silknet offerings are LTE-based
- As with residential pricing, usage charges do not feature in any of the results – many providers have moved away from usage-based pricing for fixed broadband.

Business fixed broadband: 10 Mb/s 30GB, all technologies



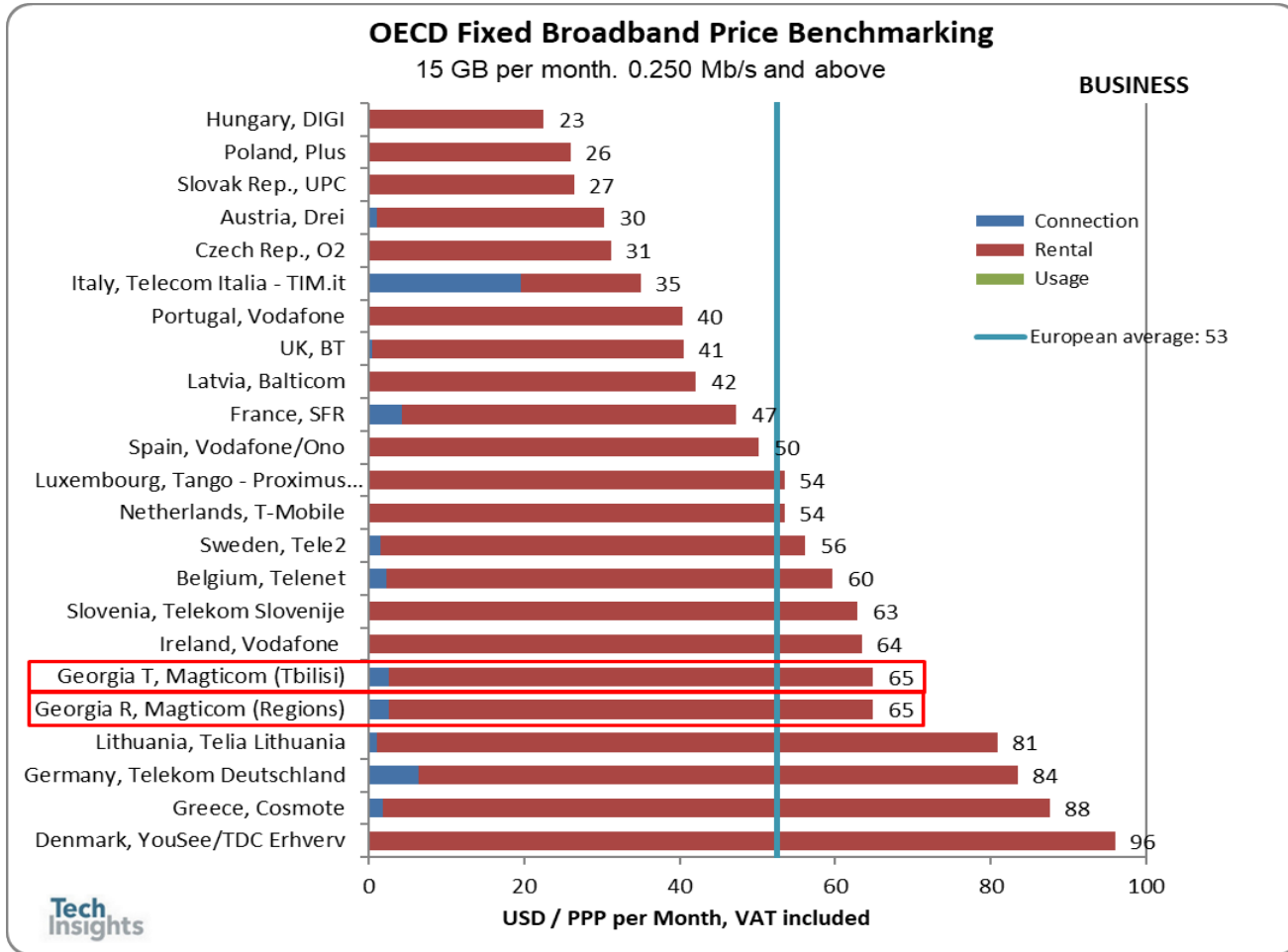
- For the 10 Mb/s basket, the position of Georgia moves down the ranking somewhat compared to the 0.25 Mb/s basket. It sits 12% below the European average of USD PPP 44.
- For this basket, Georgia ranks in 7th position.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia.
- For both results for Georgia, Silknet is the cheapest provider, with both offerings LTE-based

Business fixed broadband: 25 Mb/s 60GB, all technologies



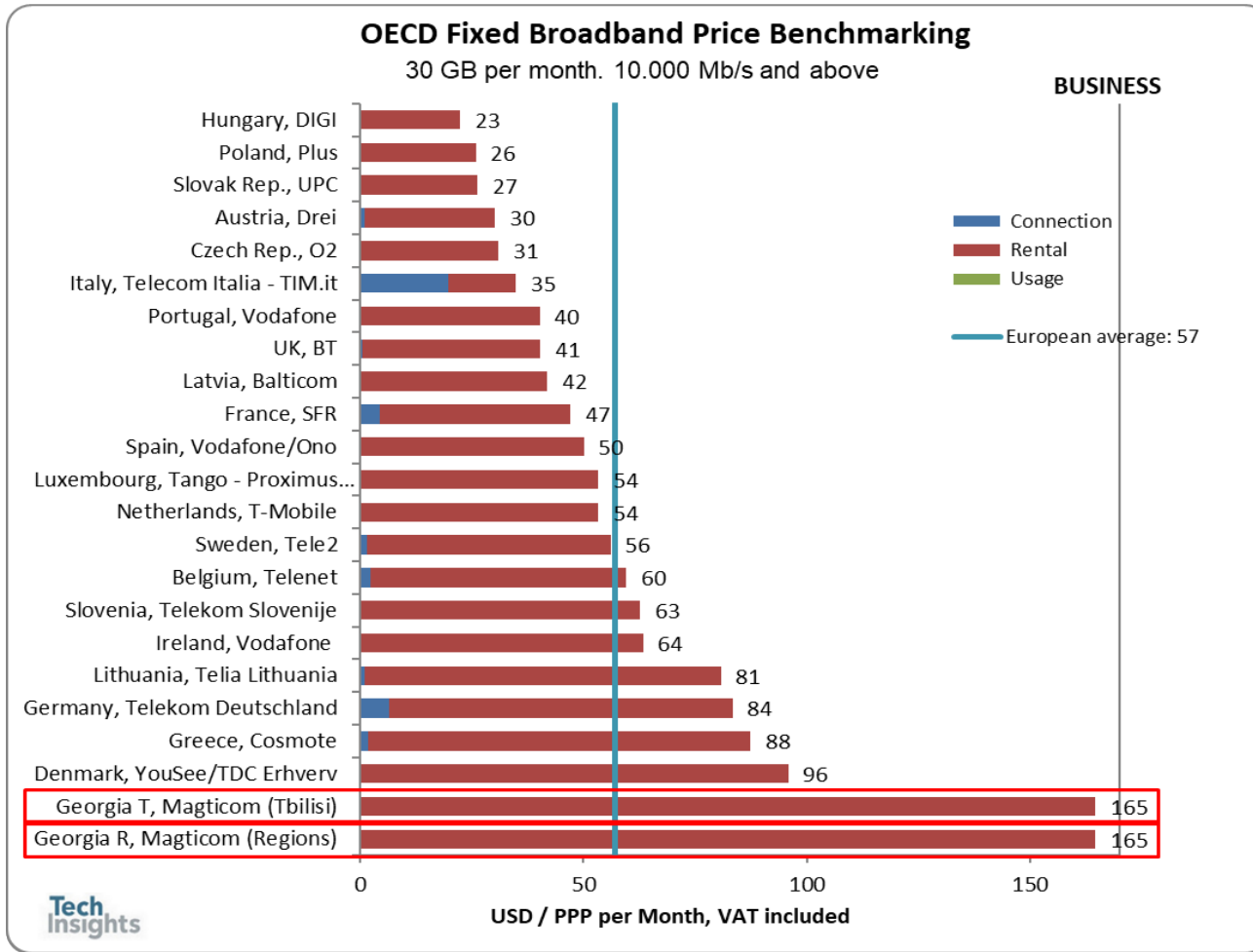
- The 25 Mb/s business basket is the highest speed in which Georgia features..
 - Note, for Georgia, this is the maximum speed of service available (among standard offers) for business users.
- For this basket, Georgia is on par with the European average of 47 USD PPP.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia..
- For both results for Georgia, Silknet is the cheapest provider, with both offerings LTE-based

Business fixed broadband: 0.25 Mb/s 15GB, fibre only



- Business broadband services based on fibre are limited in terms of speed and are also generally expensive.
- For this fibre-only basket, Georgia sits towards the more expensive end of the comparator countries.
 - Its position is less favourable than the same basket based on all technologies
- Both sets of results sit some way above the European average of 53 USD PPP.
 - Prices in Georgia are 24% higher than the European average.
- There is no variation in the cheapest offer for this service between Tbilisi and other regions in Georgia.
- For both results for Georgia, Magticom is the cheapest provider.

Business fixed broadband: 10 Mb/s 30GB, fibre only



- The 10 Mb/s basket is the highest speed basket in which fibre-based business pricing for Georgia features (among standard offers).
- As previously, Georgia is positioned less favourably, and is actually the most expensive in terms of cost, and by some considerable way.
- It is almost 3 times higher than the European average of USD PPP 57.
- For both results for Georgia, Magticom is the cheapest provider.

Bundled services results

Result observations for bundled communication services

		Residential - USD PPP inc VAT			Georgia Tbilisi rank (out of 24)	Georgia Regions rank (out of 24)	Georgia Tbilisi to European average	Georgia Regions to European average	Number of subscribers	% of subscribers
		Georgia Tbilisi	Georgia Regions	European average						
FBB	FBB-TV basic, 2 Mbps, 10 channels	50	38	59	10	6	-15%	-36%	11,841	2%
All technologies	FBB-TV low, 25 Mbps, 20 channels	50	38	61	9	5	-18%	-38%	560,272	97%
	FBB-TV medium low, 100 Mbps, 30 channels	123	127	92	22	24	33%	38%	7,647	1%
FBB	FBB-TV basic, 2 Mbps, 10 channels	50	38	64	9	5	-21%	-40%	4	0%
Fibre only	FBB-TV low, 25 Mbps, 20 channels	50	38	66	8	4	-24%	-43%	560,272	99%
	FBB-TV medium low, 100 Mbps, 30 channels	123	127	94	19	21	30%	35%	7,647	1%

Bundled services are limited to fixed broadband and TV, plus fixed broadband, mobile voice and data and TV. As there are no OECD baskets which feature fixed broadband, mobile voice and data and TV, only results for fixed broadband and TV are shown. Further, the fibre only costs for Georgia are identical to the all-technologies results, as bundled offers are based on fibre only.

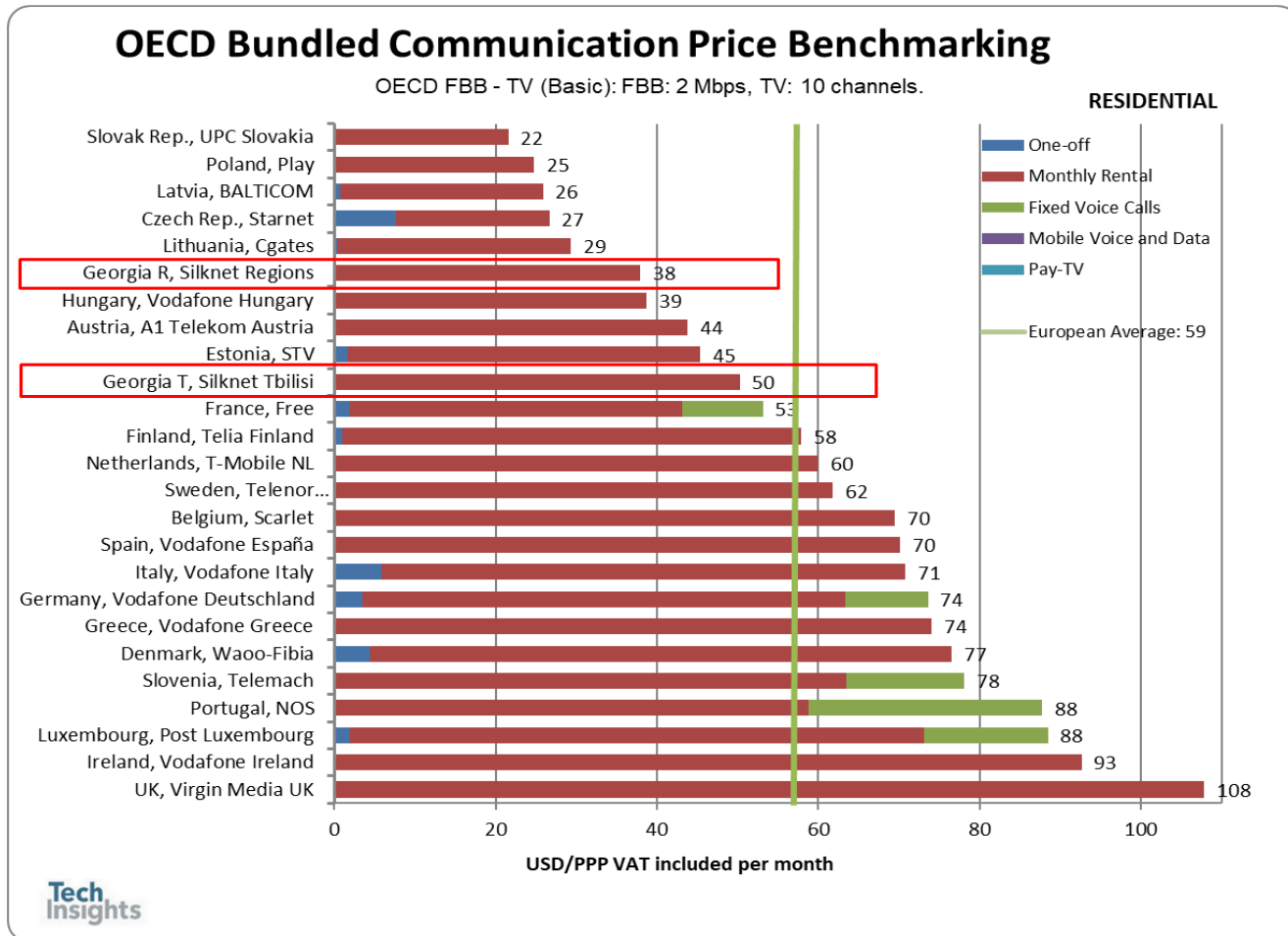
Both Tbilisi and regional pricing for the lowest two baskets sit below the European average, for both all-technology pricing and fibre-only pricing. Regional pricing in Georgia for these baskets is 24% cheaper than pricing in Tbilisi.

For the highest usage basket, however, both regional and Tbilisi pricing is significantly above the European average, driven by the high cost of fixed broadband at higher speeds, with pricing for Tbilisi slightly cheaper than regional pricing. As with standalone broadband, most users in Georgia will subscribe to lower speed services, as high speeds are very expensive, and only a very small proportion of users in Georgia (1%) subscribe to services at 100 Mb/s or above, which is significantly lower than the European comparison countries. The very low numbers taking higher speed services in Georgia is driven by the very high prices for high speed, which see Georgia as one of the most expensive for the highest speed basket for which results are available. Until prices fall at the higher speeds, the take up of these services is unlikely to increase in Georgia.

As pricing for Georgia is fibre-based, the 'all technology' costs for Georgia do not differ to the fibre-based costs. This is not the case in all countries, and the fibre-only results produce slightly more favourable results for Georgia.

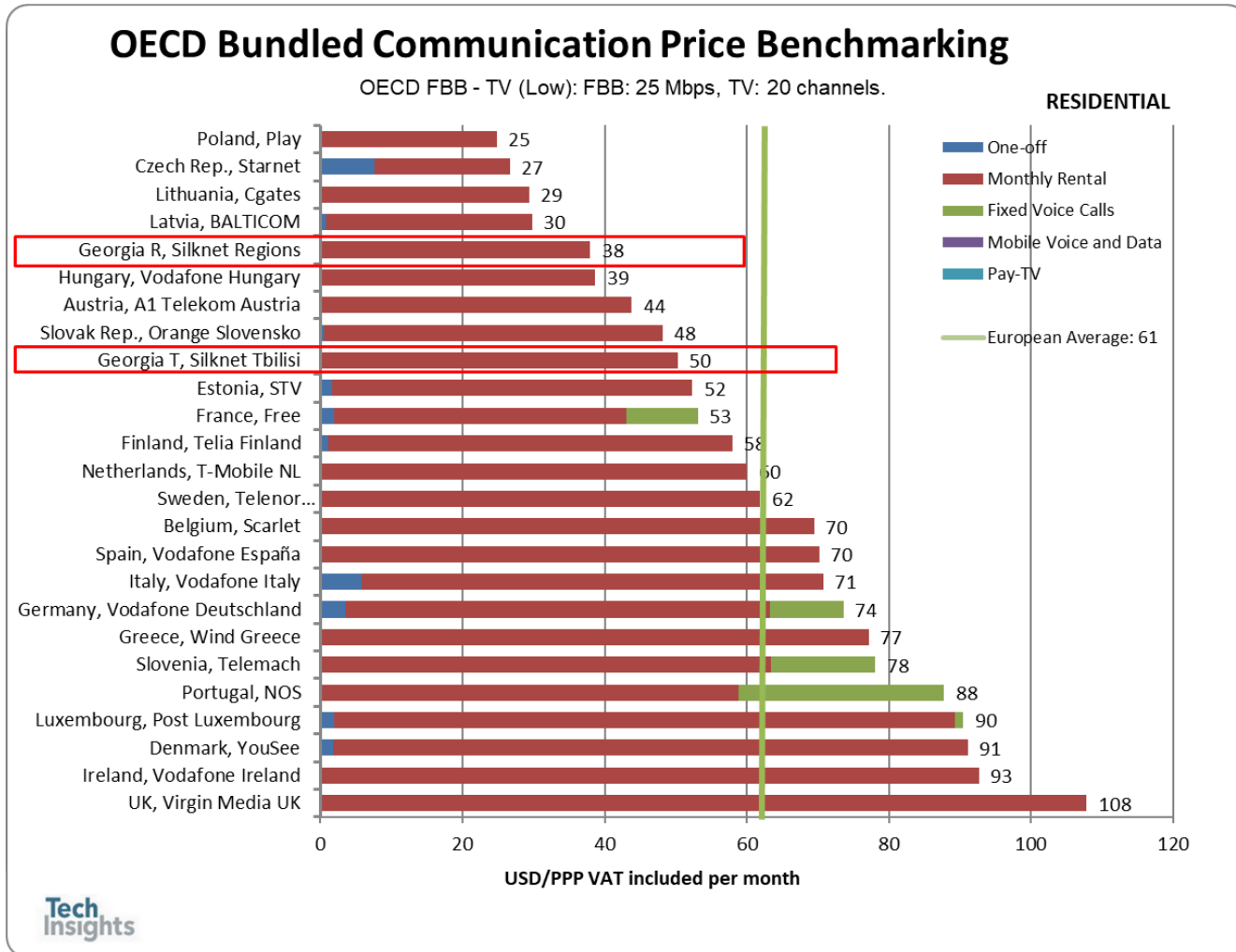
Results for all baskets are presented in the table above. As there are only three baskets which show results for Georgia, all the results are also included in the rest of this section and are shown in bold in the above table. Green highlight indicates that Georgia is at least 15% below the European average; red indicates that Georgia is at least 15% more expensive than the European average.

FBB-TV basic, 2 Mbps, 10 channels, all technologies



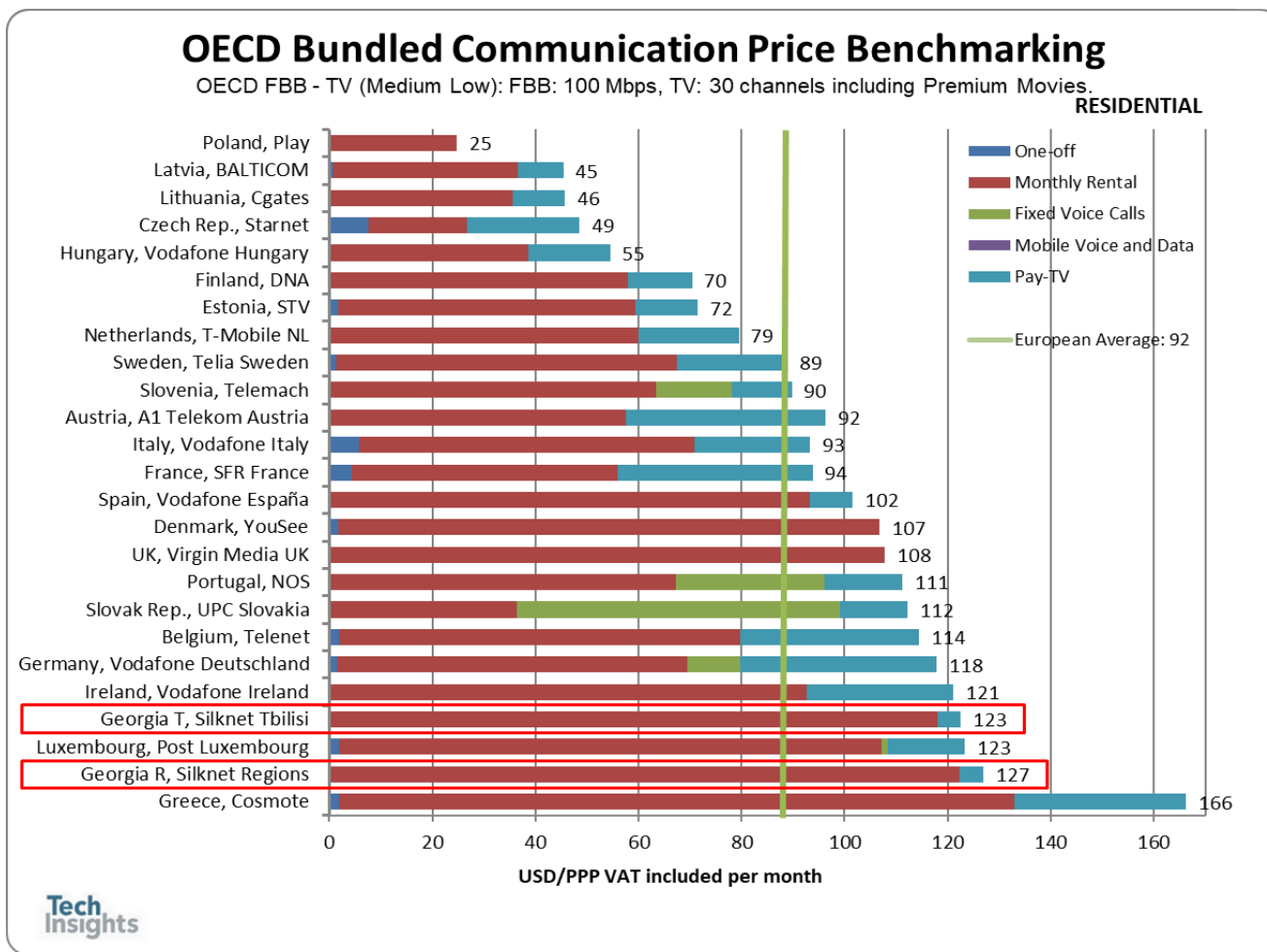
- This bundled services basket has a minimum required broadband speed of 2 Mbps, and at least 10 TV channels.
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the cheapest result from Georgia is a regional offer from Silknet, including a 25 Mbps fixed broadband service, and 190 TV channels, which ranks 6th cheapest, at a cost of USD PPP 38 per month.
- The Georgian offer for Tbilisi is also based on Silknet pricing and ranks 10th cheapest. The offer is a 25 Mbps service, with 92 TV channels.
- As the results for Georgia are based on fibre service, the Georgian costs are replicated in the fibre-only results, although the ranking for Tbilisi varies as not all results from other countries are fibre-based.

FBB-TV low, 25 Mbps, 20 channels, all technologies



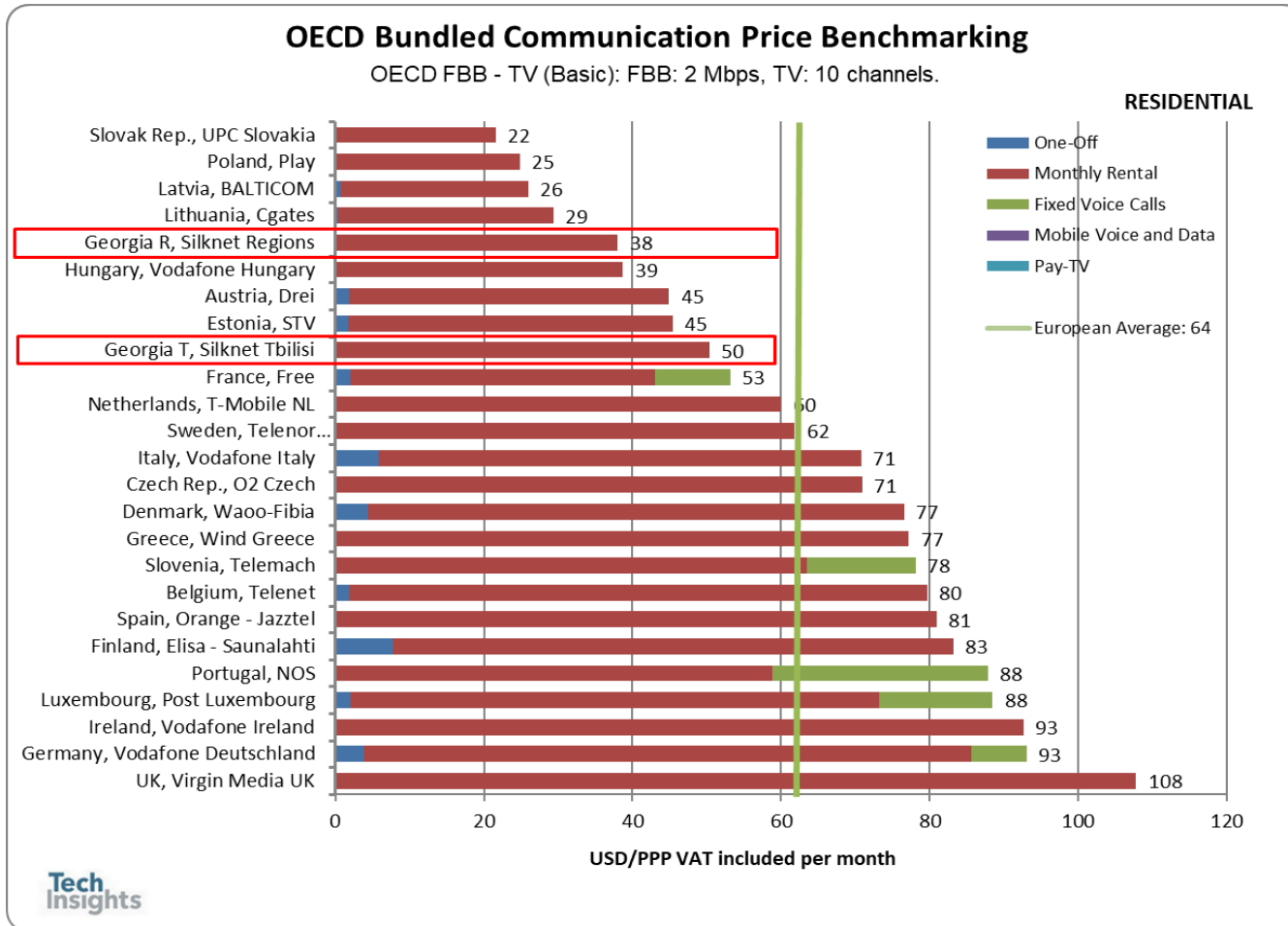
- This bundled services basket has a minimum required broadband speed of 25 Mbps, and at least 20 TV channels.
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the results for Georgia are identical to the previous basket, as the services fulfil the requirements of both baskets.
- The cheapest result from Georgia is a regional offer from Silknet, including a 25 Mbps fixed broadband service, and 190 TV channels, which ranks 5th cheapest, at a cost of USD PPP 38 per month. The Georgian offer from Tbilisi is also based on Silknet pricing and ranks 9th cheapest. The offer is a 25 Mbps service, with 92 TV channels.
- As the results for Georgia are based on fibre service, the costs for Georgia are replicated in the fibre-only results.

FBB-TV medium low, 100 Mbps, 30 channels, all technologies



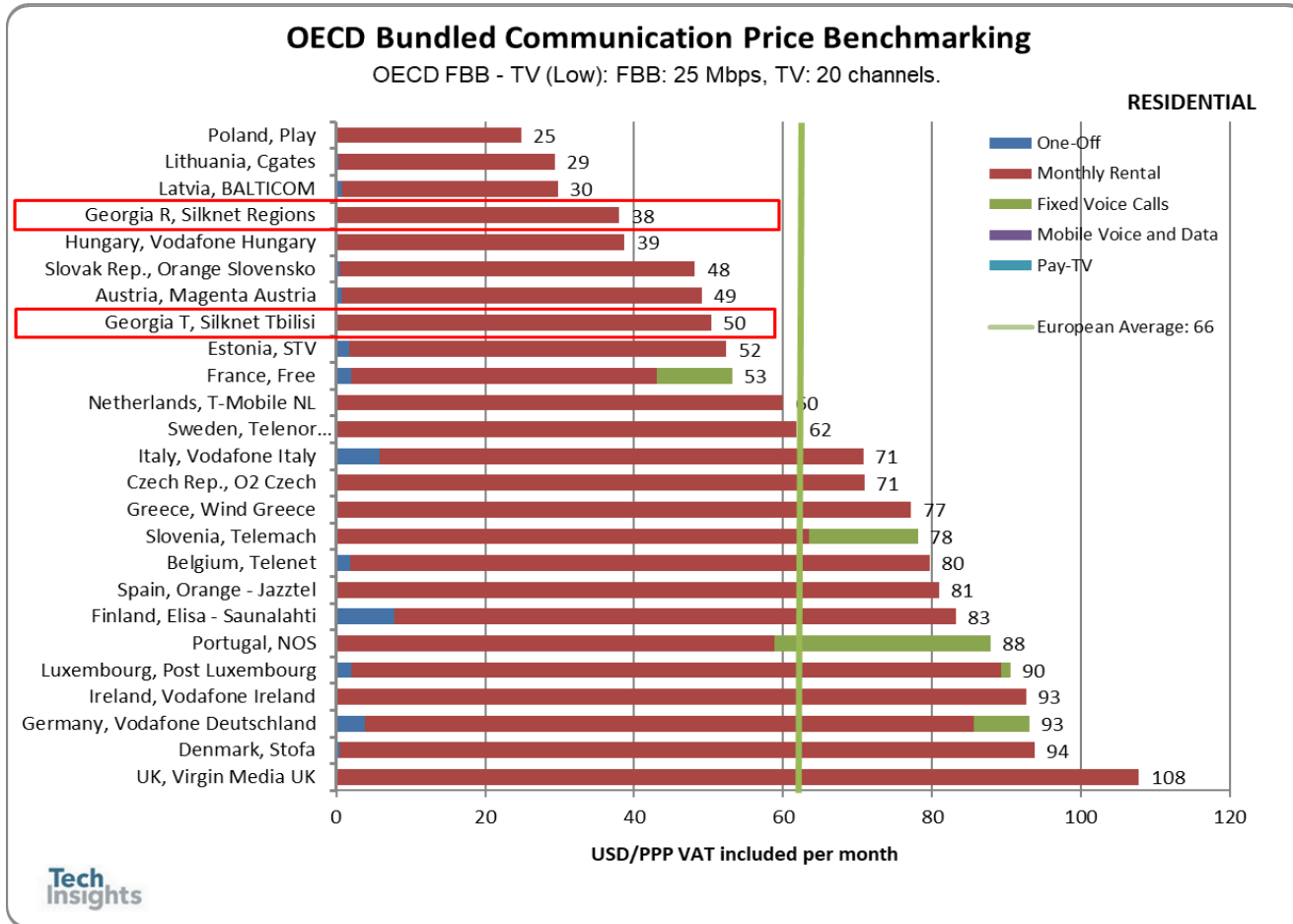
- This bundled services basket has a minimum required broadband speed of 100 Mbps, and at least 30 TV channels, including premium movies
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the high cost of the higher speed fixed broadband pushes the Georgian results up to second and fourth most expensive. As with the other baskets, the results for Georgia are based on Silknet pricing, which is the cheapest. For this basket, however, Tbilisi pricing is cheaper than the regional pricing. Both services are based on a 100 Mbps broadband line, with 92 and 190 TV channels respectively.
- As the results for Georgia are based on fibre service, the costs for Georgia are replicated in the fibre-only results.

FBB-TV basic, 2 Mbps, 10 channels, fibre only



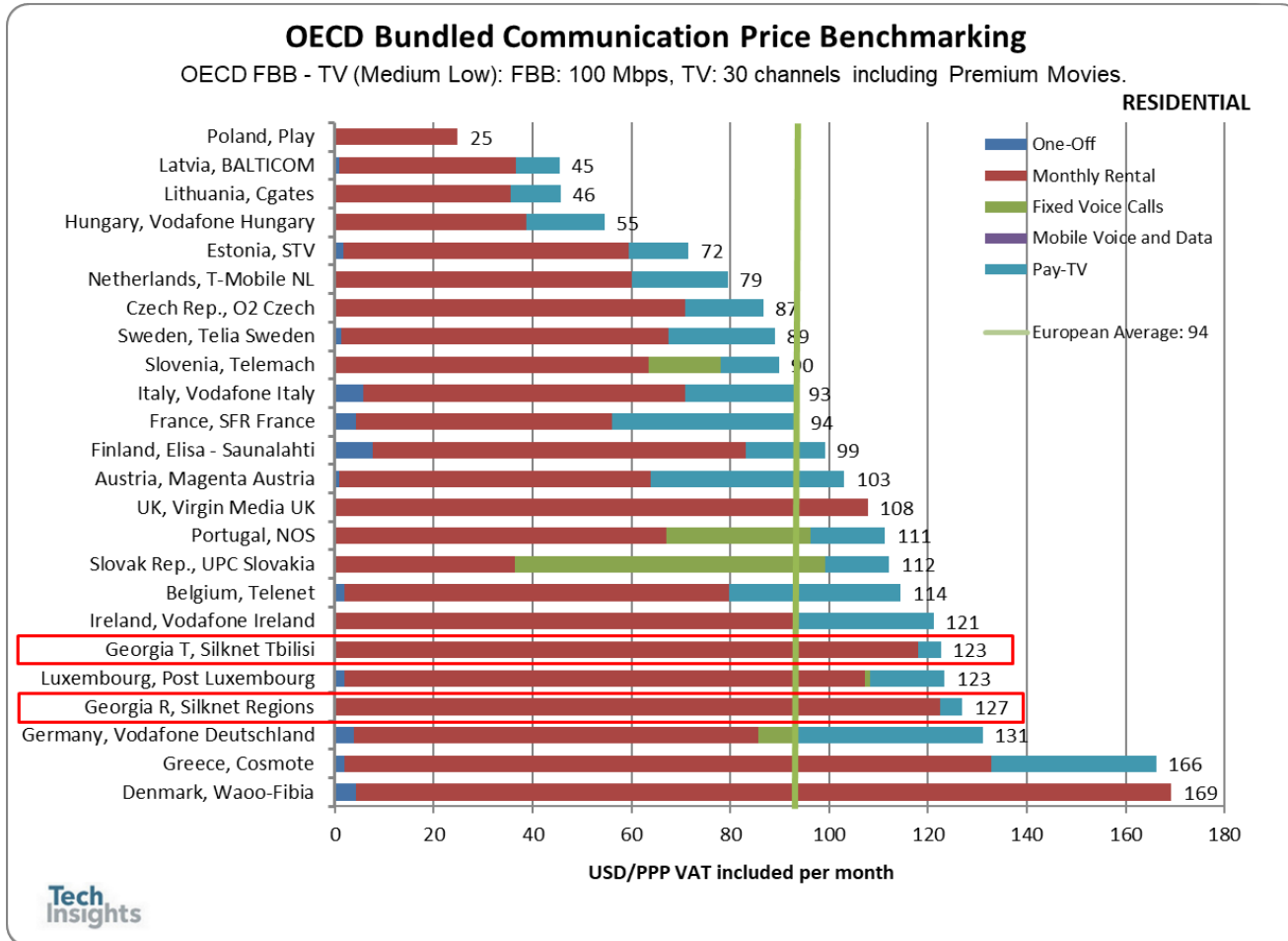
- This bundled services basket has a minimum required broadband speed of 2 Mbps, and at least 10 TV channels.
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the cheapest result from Georgia is a regional offer from Silknet, including a 25 Mbps fixed broadband service, and 190 TV channels, which ranks 5th cheapest, at a cost of USD PPP 38 per month.
- The Georgian offer from Tbilisi is also based on Silknet pricing and ranks 9th cheapest. The offer is a 25 Mbps service, with 92 TV channels.
- As the results for Georgia are based on fibre service, the costs for Georgia are identical to the all-technologies result.

FBB-TV low, 25 Mbps, 20 channels, fibre only



- This bundled services basket has a minimum required broadband speed of 25 Mbps, and at least 20 TV channels.
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the results for Georgia are identical to the previous basket, as the services fulfil the requirements of both basket.
- The cheapest result from Georgia is a regional offer from Silknet, including a 25 Mbps fixed broadband service, and 190 TV channels, which ranks 4th cheapest, at a cost of USD PPP 38 per month. The Georgian offer from Tbilisi is also based on Silknet pricing and ranks 8th cheapest. The offer is a 25 Mbps service, with 92 TV channels.
- As the results for Georgia are based on fibre service, the costs for Georgia are identical to the all-technologies result.

FBB-TV medium low, 100 Mbps, 30 channels, fibre only



- This bundled services basket has a minimum required broadband speed of 100 Mbps, and at least 30 TV channels, including premium movies
- Other services may be included in the cost for some countries, if they are the overall cheapest, or if it is not possible to separate out the cost of these services.
- For this basket, the high cost of the higher speed fixed broadband pushes the Georgian results up to among the more expensive countries. As with the other baskets, the results for Georgia are based on Silknet pricing, which is the cheapest. For this basket, however, Tbilisi pricing is cheaper than the regional pricing. Both services are based on a 100 Mbps broadband line, with 92 and 190 TV channels respectively.
- As the results for Georgia are based on fibre service, the costs for Georgia are identical to the all-technologies result.

End of report