

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INNOVATION
DIGITAL POLICY COMMITTEE****Working Party on Connectivity Services and Infrastructures****The 2026 OECD price basket methodology for communication services****Technical paper**

This technical paper, “The 2026 OECD price basket methodology for communication services” [DSTI/DPC/CSI(2025)4/REV2], consolidates the methodological work undertaken by the Secretariat to update the OECD price baskets for communication services in light of market and technological developments. It updates the OECD’s previous methodologies: for standalone communication services, dating back to 2017 [DSTI/CDEP/CISP(2017)4/FINAL], and bundled services introduced in 2020 [OECD Digital Economy Papers, No. 300]. The work builds on the initial discussions held at the 69th Session of the Working Party on Connectivity Services and Infrastructures (WPCSI) on 6-7 November 2024, the dedicated half-day Workshop held at the 70th Session on 4 April 2025, including written comments received in reference to the Room Document presented for discussion [DSTI/DPC/CSI/RD(2025)1], and subsequent discussions at the 71st Session on 4-5 November 2025 and 72nd Session on 6-7 May 2026. It was developed through two complementary methodological streams: the revision of the methodology for standalone communication services, presented in “The 2026 OECD price basket methodology for standalone communication services” [DSTI/DPC/CSI(2025)4/REV1], and the revision of the methodology for bundled communication services, presented in “The 2026 OECD price basket methodology for bundled communication services” [DSTI/DPC/CSI(2026)4]. The present paper brings these two streams together into a single document covering both standalone and bundled communication services and incorporates feedback received from delegates through the WPCSI discussions and written consultation since 2024. It is a technical paper presented for information and is planned for publication as a technical paper under the authority of the Secretary-General.

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The 2026 OECD price basket methodology for communication services

Communication services are essential to digital transformation, making their affordability a key policy concern. For over three decades, the OECD has provided internationally comparable benchmarks through its price basket methodologies, used by governments, regulators, and researchers. Rapid technological and market developments require periodic updates to maintain their relevance. This technical paper consolidates the 2026 OECD methodology for both standalone and bundled communication services, last updated in 2017 for standalone and 2020 for bundled. The new approach reflects the convergence of fixed, mobile, broadcasting, and over-the-top (OTT) services into integrated offers, treating standalone services as the building blocks for bundled packages. It removes outdated pricing elements, aligns speed tiers and data allowances with current market realities - including 5G, FWA, and satellite - and introduces modern features such as OTT integration. The revision builds on feedback from delegates and stakeholders of the OECD Working Party on Connectivity Services and Infrastructures (WPCSI). The updated methodology preserves analytical robustness while ensuring that the OECD communication price baskets remain relevant, transparent, and cross-country comparable for evidence-based policymaking.

Executive summary

Communication services are central to digital transformation, economic participation, and social well-being, making their affordability a key policy concern. For over three decades, the OECD has provided internationally comparable benchmarks through its communication services price basket methodologies, enabling governments, regulators, and researchers to make evidence-based policy decisions. The methodologies have been updated over time, with the latest revision for standalone communication services dating to 2017, and for bundled communication services in 2020. However, rapid technological change, such as the rise of 5G, over-the-top (OTT) services, and data-driven consumption patterns, mean that the 2017 and 2020 methodologies no longer fully reflect today's markets. The 2026 revision introduces a unified methodology for both standalone and bundled communication services, reflecting the progressive convergence of fixed, mobile, broadcasting, and OTT offers into single commercial packages.

A unified framework for a converged communication market. The 2026 revision marks a significant evolution in OECD benchmarking, consolidating the methodologies for standalone and bundled services into a single, coherent framework. Standalone communication services, namely fixed broadband and mobile voice and data, are now building blocks of bundled offers, which dominate how consumers purchase connectivity. By aligning both methodologies on a common set of general rules and updated parameters, the revised OECD methodology supports internal consistency, cross-country comparability, and a closer reflection of actual consumer purchasing behaviour.

Markets and consumer behaviour have changed profoundly since 2017. Since 2017, the communication sector has been transformed. Demand for faster fixed broadband has surged, with the share of gigabit subscriptions in total fixed broadband rising 12-fold between 2018 and 2025 (i.e. from 2% to 24%). Mobile data consumption has also risen sharply, with average usage per subscription growing 3.6-fold from 2018 to 2025 (i.e. from 4.7 GB per month to 17.5 GB) driven by 5G adoption and data-intensive applications. Bundled subscriptions have become the norm: between 2018 and 2025 they accounted for 68 to 69% of fixed broadband subscriptions in the OECD. Triple-play bundles, combining fixed broadband, fixed voice and pay TV, are the most common and are offered in 92% of OECD Member countries. With the widespread rollout of 5G, the rise of unlimited data plans, and the integration of OTT services, legacy features such as time-of-day billing and on-net/off-net distinctions have lost their relevance, calling for a modernised approach.

A simpler, better-aligned and future-proof methodology. The 2026 revision simplifies, aligns and future-proofs the OECD price basket methodology. It aims to make price comparisons more transparent for users and to make data collection sustainable over time. The revised methodology removes outdated parameters and focuses on data-driven, consumer-centric metrics, while preserving analytical depth. It rests on three components.

1. Simplification: clearer rules and fewer baskets

The methodology keeps its foundational principles, such as excluding hardware costs and comparing prices using purchasing power parities. Its general rules are now simpler and more consistent:

- **Contract duration:** reduced from 36 to 24 months, to reflect shorter consumer commitments.

- **Market coverage:** the market share threshold is harmonised at 70% for both fixed broadband and mobile services, covering the two or three main operators in each country.
- **Nationwide availability:** offers must be available across the country, with exceptions for geographically complex regions.
- **Outdated parameters removed:** time-of-day charging and on-net/off-net distinctions no longer apply.

The bundle structure is also streamlined, from 30 baskets to eight:

- **Double-play:** fixed broadband and TV (low), and fixed broadband and mobile (medium).
- **Triple-play:** fixed broadband, fixed voice and TV (medium, high and very high) and fixed broadband, fixed voice and mobile (medium).
- **Quadruple-play:** fixed broadband, fixed voice, mobile and TV (medium and high).

With clearer rules and fewer baskets, the results are easier for users to understand and the data are less demanding to collect.

2. Future-proofing: baskets that reflect real-world usage

The updated baskets reflect how people use communication services today and anticipate emerging technologies:

- **Fixed broadband:** six usage profiles, from low to very high, with speeds from 10 Mbps to 5 Gbps and unlimited data as standard in higher profiles. Three fixed wireless access profiles and one satellite basket capture emerging technologies.
- **Mobile voice and data:** five profiles, from basic to very high, reflecting the shift to data-centric plans. They include 5G speed tiers and unlimited data options, with less emphasis on voice minutes and text messages.
- **Bundles:** each of the eight baskets builds on the updated standalone parameters, with mobile data allowances ranging from 50 GB in the medium profile to unlimited in the very high profile.
- **TV services:** a minimum of 20 live linear channels replaces the previous channel counts, and premium TV profiles now include subscription video streaming services (OTTs) with the inclusion of premium OTT services (without adds), reflecting changing viewing habits.

Including fixed wireless access, satellite, 5G and OTT streaming services should help the baskets stay relevant as markets evolve, which may reduce the need for frequent overhauls.

3. Alignment: consistent international comparisons

The methodology now aligns more closely with the International Telecommunication Union (ITU) and the European Commission (EC). The basic mobile profile is aligned with the ITU's, and the medium mobile profile with the EC's profile. For bundles, four baskets correspond to EC household profiles. Closer alignment makes results easier to compare across countries and sources, giving users and policy makers a more consistent picture of communication service prices.

A forward-looking tool for evidence-based connectivity policy. The 2026 methodology positions the OECD's price basket framework as a robust, adaptable tool for the future. By updating the methodology and aligning it with international benchmarks, the OECD strengthens the sustainability, transparency, and public-good nature of its data on digital connectivity. By focusing on data-driven, consumer-centric metrics, the 2026 OECD price basket methodology of communication services supports policies that promote affordable and high-quality connectivity, which in turn underpins economic security. As the connectivity ecosystem continues to evolve, the framework is designed to keep OECD price benchmarks of communication services relevant, transparent, and actionable for policymakers worldwide.

The 2026 OECD price basket methodology for communication services

Introduction

1. Communication services are essential to modern life, underpinning digital transformation, economic participation, and social well-being. The price of these services significantly influences the cost of living, making their affordability an important issue for policy attention. Through the Working Party on Connectivity Services and Infrastructures (WPCSI), the OECD has long recognised the importance of tracking prices and, for over 30 years, has measured communication services prices, providing internationally comparable data to support evidence-based policymaking.

2. The WPCSI plays a central role in providing cross-country comparable data on the prices of communication services. Grounded in detailed and internationally agreed standards, the OECD's price basket methodologies enable meaningful comparisons and are widely used by governments, regulators, researchers, and think tanks across the world.¹ The OECD communication price baskets provide information on the range of connectivity offers available to consumers across countries over time, and account for different usage levels to reflect the heterogeneity of user profiles.

3. Since the introduction of the first OECD telecommunication price baskets in the early 1990s, the methodology has been revised periodically to keep pace with technological change and evolving consumer behaviour. Two methodological documents currently govern this work, which have been in the process of revision in 2025-2026: the OECD price basket methodology for standalone communication services of 2017 (OECD, 2017^[1]), measuring individual services such as fixed broadband (FBB) and mobile voice and data (MVD); and the OECD methodology for bundled communication services, introduced in 2020 (OECD, 2020^[2]), which measures converged offers that combine fixed broadband, fixed voice, mobile voice and data, and Pay-TV, and that now dominate how consumers purchase connectivity.

4. The 2026 revision of the OECD's standalone communication price basket methodology marks a significant step toward aligning benchmarking practices with today's data-driven, platform-centric environment and with other organisations' price baskets. This update to the methodology of standalone communication services, the first since 2017, responds to transformative changes in fixed broadband and mobile services, including the widespread rollout of 5G, the rise of unlimited data plans, and the declining relevance of legacy features like SMS and time-of-day billing. The revision process, initiated in November 2024 and refined through a Workshop in April 2025, reflects broad consensus on the need for simplification, modernisation, and enhanced international alignment.

5. The OECD introduced the bundled communication baskets in 2020 to reflect the growing prevalence of converged offers combining fixed broadband, fixed voice, mobile voice and data, and Pay-TV services (OECD, 2020^[2]). Since then, bundled offers have become more complex, data-rich, and central

to household connectivity, with significant changes in how fixed, mobile, and TV communication services are packaged and consumed, including the widespread adoption of over-the-top (OTT) services for TV. These developments now make it necessary to update the 2020 methodology to ensure it remains aligned with current market conditions and consumer behaviour.

6. This document brings together, for the first time, a single account of the 2026 revision of both methodologies. It is presented within the context of the ongoing convergence of communication services, defined here as the progressive merging of fixed, mobile, broadcasting and OTT offers into single commercial packages, which is precisely why the standalone and bundled baskets can no longer be treated as two separate exercises. It reflects the fact that they are structurally linked: the standalone methodologies for fixed broadband and mobile voice and data are the building blocks of the bundled methodology, which combines and repackages these same underlying services alongside fixed voice and television. Presenting both together, on a common set of general rules and a coherent, updated set of parameters, ensures that the OECD's benchmarking tools remain internally consistent, comparable across countries, and reflective of how consumers actually purchase communication services today, whether standalone or as part of a bundle.

7. The following is organized as follows. Section 2 sets out the background and context of the OECD price basket methodologies, tracing the key milestones since the 1990s and describing what the 2017 standalone methodology and the 2020 bundled methodology each introduced. Section 3 explains the rationale for the 2026 revision, including the technological and market developments observed since 2017 (2020 for bundled services) across fixed broadband, mobile voice and data, and bundled services. Section 4 presents the unified 2026 methodology itself, covering the general rules and the parameters adopted for fixed broadband, mobile voice and data, and bundled communication services. Section 5 concludes.

Background and context

Key milestones

8. Since the introduction of the OECD telecommunication price baskets in the early 1990s, several methodologies have been developed to capture the complexities and specificities of pricing across a wide range of communication technologies. These methodologies have addressed over time different services: fixed voice services (PSTN), leased lines, mobile voice, Internet dial-up services, fixed broadband, mobile broadband (voice and data, and data-only) and since 2020, bundled communication services.

9. The OECD conducts regular revisions of these methodologies to accommodate technological advancement and evolving consumer profiles; each generation has responded to the technological shifts and market developments of its time. Key milestones include:

- 1990: Original OECD telecommunication price baskets introduced (i.e. "T-Baskets").
- 2000: Methodological revision implemented (e.g. Dial-up Internet).
- 2002: Introduction of mobile voice baskets.
- 2005: Methodological update of the Telecommunication price baskets (i.e. PSTN, mobile voice, leased lines, Internet).
- 2009: Update in response to shifts in mobile offers, following the rise of smartphones (e.g. iPhone in 2007)
- 2012: Introduction of Fixed Broadband price baskets. and Mobile Broadband (dongle-based, data-only) price baskets.

- 2017: Consolidation and revision of all standalone methodologies into a single methodology.
- 2020: Introduction of the methodology for bundled communication services.
- November 2024: The 69th WPCSI meeting launches the formal review of the Standalone methodology and agrees to discontinue several legacy baskets (i.e. mobile “dongle” broadband, fixed voice standalone (PSTN) and leased lines).
- April 2025: A dedicated half-day Workshop at the 70th WPCSI meeting gathers delegate and stakeholder feedback on simplification, global alignment and future-proofing the OECD price basket methodology.
- November 2025: The 71st WPCSI meeting reviews the revision of standalone communication services and agrees to update the Bundled methodology in parallel, incorporating the revised standalone parameters by default.
- May 2026: The 72nd WPCSI meeting discusses and endorses the technical paper with the standalone revision and the revision of bundled communication services is presented. The meeting was followed by written comments, and 13 submissions were received and addressed. November 2026: The technical paper is presented for information at the 73rd WPCSI meeting containing the consolidated methodology for standalone and bundled communication services, “The 2026 OECD price basket methodology for communication services”.

The evolution of the methodology for standalone communication services: the 2017 and 2025 revisions

10. The 2017 methodology was an update and a consolidation of the previous Standalone methodologies developed between 1990 and 2015. It brought together, for the first time, the pricing rules for fixed voice (PSTN), leased lines, mobile voice, dial-up Internet, fixed broadband and mobile broadband services into a single, coherent methodological document, while preserving the detailed and complex pricing elements inherited from the older, service-specific methodologies. This 2017 framework has since been revised: the revision was finalised in 2025.

The evolution of the methodology for bundled communication services: the 2020 introduction and the 2026 revision

11. The OECD introduced the bundled communication price baskets in 2020 to reflect the growing prevalence of converged offers combining fixed broadband, fixed voice, mobile voice and data, and TV services (basic and premium services). The 2020 methodology was, at the time, an innovative response to a market that was shifting decisively toward bundling: it defined six basket types across five user profiles, totalling 30 basket permutations, intended to capture the full diversity of bundled offers across OECD Member countries.

12. Since 2020, bundled offers have become more complex, data-rich, and central to household connectivity, with significant changes in how fixed, mobile, and TV services are packaged and consumed, including the widespread adoption of over-the-top (OTT) services for television. These developments, combined with the sheer complexity of the original 30-permutation framework, have made it necessary to update the 2020 methodology to ensure it remains aligned with current market conditions and consumer behaviour.

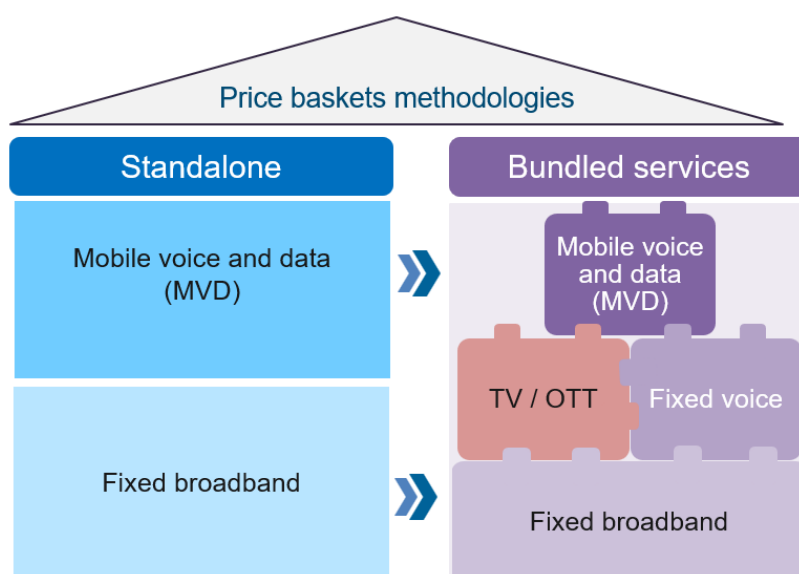
Convergence and the building blocks of the bundled methodology

13. This unified revision takes place in light of a broader, long-running trend in the communication sector: convergence. Technological convergence refers to the progressive blurring of boundaries between networks, services and industries that were historically separate: fixed and mobile telephony, Internet access, broadcasting and television, as these have moved onto shared IP-based infrastructure and increasingly merged into single commercial offers. This trend has unfolded over more than two decades, from the early convergence of voice and data networks, through the emergence of double- and triple-play bundles combining fixed broadband, telephony and television, to the more recent integration of mobile connectivity and OTT streaming media platforms into a single household subscription. For most OECD households and individuals today, “communication service” are no longer a single, standalone product but part of an integrated offer spanning fixed and mobile access as well as media consumption.

14. A central premise of this unified revision is that the standalone and bundled communication services methodologies are not independent of one another. The price baskets for standalone communication services (i.e. fixed broadband and mobile voice and data) can be understood as the building blocks of connectivity (Figure 1) they define, service-by-service, the usage profiles and pricing rules that are then combined, together with fixed voice and television and OTT, to construct the bundled communication services baskets. Bundled services, in turn, function as the engine of modern connectivity commercial offers, since the large majority of communication services across the OECD are now purchased as part of a bundle rather than on a standalone basis. This building-blocks logic is, in effect, the OECD’s methodological response to convergence: as connectivity and content continue to converge in the market, the way their prices are measured and compared must converge accordingly.

15. Because of this relationship, the two methodologies must be presented in a coordinated and sequential manner: the parameters of the standalone price baskets for fixed broadband and mobile voice and data are revised first, and the revised methodology for bundled communication services then incorporates these updated parameters directly, ensuring full consistency between what is measured on a standalone basis and what is measured within a bundle.

Figure 1. The building blocks of the Standalone and Bundled services methodologies



Source: OECD

Rationale for the 2026 revision

Drivers of the revision

16. This revision was driven by two main factors that apply to both standalone and bundled services methodologies. First, the technological advancements and market evolutions seen in the communication sector since 2017 (2020 for bundled services) have made some elements of the current methodologies obsolete. Second, there was broad consensus among stakeholders that the current methodologies are no longer fully aligned with today's communication services landscape.

17. Regarding standalone communication services, because the basket methodology was last revised in 2017 primarily to consolidate older approaches, it included outdated pricing elements that need to be reconsidered, including:

- time-of-day billing,
- on-net/off-net calls distinctions,
- SMS and call-based pricing models, which are increasingly irrelevant in today's data-centric communication environment.

18. Reflecting these widespread changes in the consumption of communication services, the price baskets for fixed voice (PSTN), leased lines, mobile voice (only), and mobile broadband (dongle-based, data-only) were discontinued from the start of 2025, following agreement at the 69th WPCSI meeting in November 2024. These legacy services are therefore no longer included in the revised methodology.

19. Concerning bundled communication services, the 2026 revision responds to the need to update a methodology that, while innovative in 2020, no longer fully reflected the rapid changes shaping the communication sector. Technological developments and shifting market dynamics had reduced the relevance of certain components of the 2020 methodology, while the emergence of new service combinations, notably the growing use of OTT services, and the diversification of pricing models had highlighted gaps in its alignment with current market realities. Stakeholders increasingly recognised that a more streamlined and flexible methodology would reduce complexity and enhance the accuracy and usefulness of international price comparisons, a recognition that this revision now delivers on.

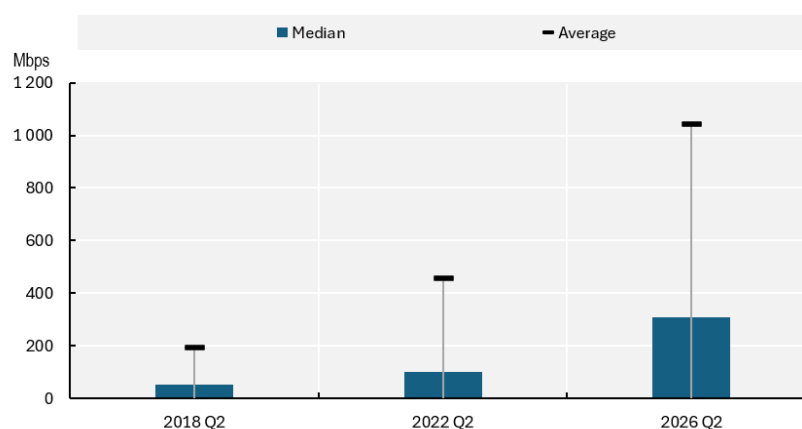
Technological and market developments

20. Recent years have seen rapid and transformative developments in communication services, driven by shifting consumer demand, technological innovation, and evolving market structures. Fixed and mobile communication services have both evolved substantially, while changes in TV consumption, notably the rise of non-linear, streaming-based viewing, have reshaped how these services are packaged together. Together, these trends underscore the need to revisit the existing benchmarking methodologies to ensure they remain aligned with current realities.

Fixed broadband

21. Fixed broadband services have evolved in several ways since 2017. One of the most prominent trends is the sharp increase in advertised download speeds across OECD Member countries (Figure 2), reflecting both technological progress and heightened consumer demand for faster and more reliable Internet access. For example, OECD countries have seen considerable increases in advertised average and median download speeds since 2018, an addition of 256 Mbps (for the median) and 848 Mbps for the average.

Figure 2. Average and median advertised download speeds of fixed broadband offers for OECD Member countries



Note: This graph illustrates trends in advertised download speeds of fixed broadband offers over time, it is not representative of actual network performance or real-world user experience. Sample sizes vary by year: approximately 800 offers were surveyed in 2018 Q2, compared to over 2 400 offers in 2022 Q2 and 2026 Q2.

Source: OECD (2026^[3]), *Communication Price Basket Benchmarking systems*, "Fixed broadband price benchmarking tool [2017-2026]" (database).

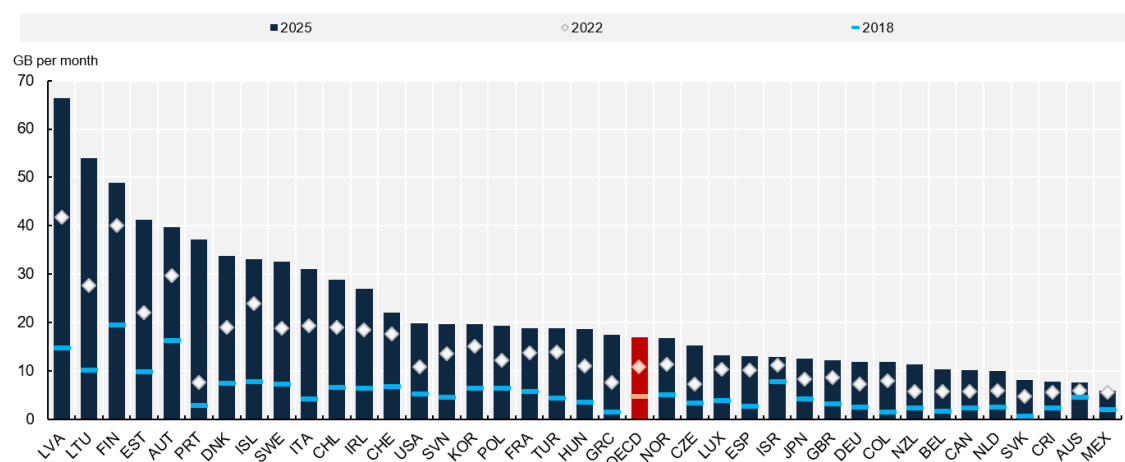
22. In parallel, maximum advertised download speeds have also surged in recent years. As of June 2026, 36 of the 38 OECD Member countries have fixed broadband plans with advertised speeds of at least 1 Gbps, up from just 20 countries in 2017, while 21 countries now have offers of 5 Gbps or more, provided by 32 operators within those countries. This major shift underscores the growing availability and affordability of high-speed Internet services. Consumer demand for high-quality broadband is rising accordingly: gigabit subscriptions grew 12-fold over 2018-2025, from 2% to 24% of all fixed broadband subscriptions in the OECD area (OECD, 2026^[4]).

Mobile voice and data

23. Mobile voice and data (MVD) services have evolved in parallel with fixed broadband. MVD offers have become more data-intensive over time, with more operators advertising "unlimited" data offers, while over-the-top (OTT) applications for voice and messaging have greatly increased in popularity, accompanied by the diminishing role of voice and SMS in MVD offers. The commercial launch of 5G networks in 2019 has accelerated this trend, bringing changes not only in speed but also in how services are structured and consumed.

24. Mobile data consumption in OECD Member countries has increased significantly since 2018: average monthly data consumption per mobile broadband subscription rose 3.6-fold, from 4.7 GB to 17.1 GB between 2018 and 2025 (Figure 3).

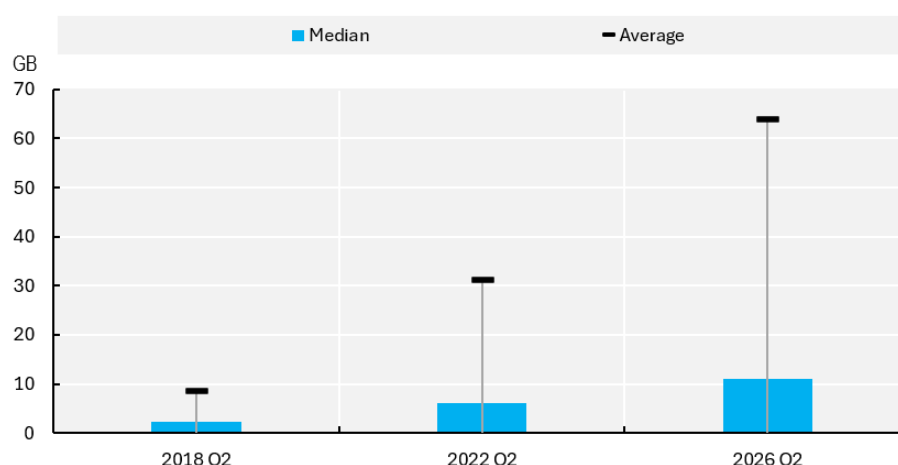
Figure 3. Mobile data usage (GB per month) in OECD Member countries in 2025



Source: (OECD, 2026^[4]), Broadband Statistics (database), <https://www.oecd.org/en/topics/sub-issues/broadband-statistics.html> (accessed on 7 October 2026).

25. This growth in demand has led to corresponding changes in service offers, with operators providing plans with larger data allowances. For example, OECD countries have seen considerable increases in mobile data allowance offers from 2018 to 2026, an addition of 9 GB (for the median) and 55 GB for the average (Figure 4). Unlimited data plans becoming more common: in Q2 2026, 32 of the 38 OECD Member countries had at least one operator offering a plan that included unlimited data.

Figure 4. Average and median advertised data allowance of mobile voice and data offers for OECD Member countries, GB/month

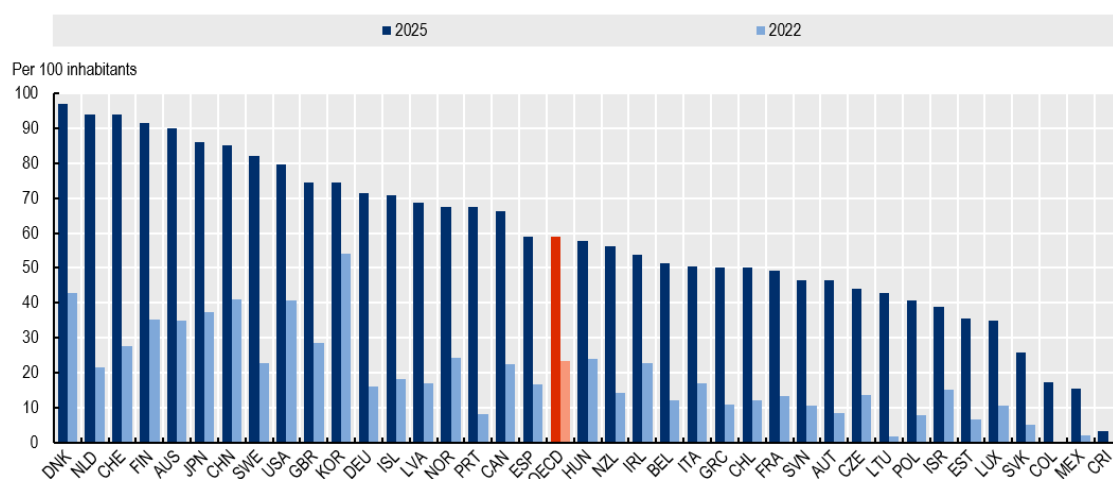


Note: This graph illustrates trends in mobile data allowance of mobile voice and data offers over time. Sample sizes vary by year: approximately 2 000 offers were surveyed in 2018 Q2 and 2022 Q2, compared to 1 300 offers in 2026 Q2.

Source: (OECD, 2026^[5]), *Communication Price Basket Benchmarking systems*, "Mobile voice and data price benchmarking tool [2017-2026]" (database).

26. A further transformative trend is the widespread introduction of 5G technology, which the 2017 standalone methodology does not account for. Since the first 5G deployments began in 2019, the technology has expanded rapidly: as of May 2026, 5G was commercially available in all OECD countries, and 5G penetration across the OECD doubled between 2022 and 2025, reaching 51 connections per 100 inhabitants by the end of 2025 (Figure 5).

Figure 5. Percentage of 5G connections per 100 inhabitants, 2022 and 2025

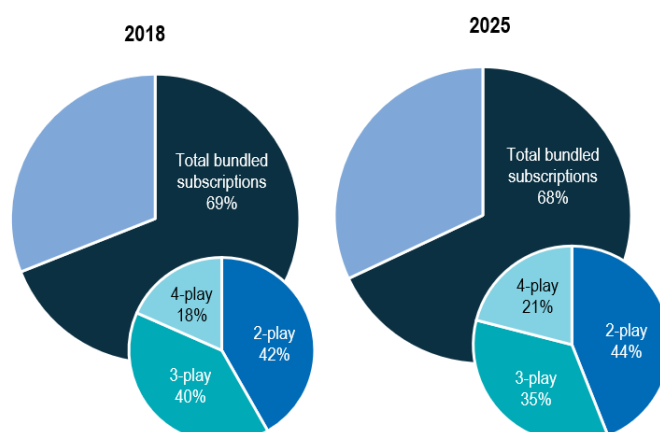


Source : (GSMA Intelligence, 2026^[6])

27. Together, these shifts in both fixed and mobile communication services signal a need to restructure basket categories and parameters to ensure they remain relevant for international benchmarking.

Bundled communication services

28. The majority of communication services across the OECD are offered as part of a bundle. This trend has stabilised in recent years, confirming that bundling remains a stable and central feature of communication service offerings: the share of bundled services within total fixed broadband subscriptions has consistently ranged between 69% and 68% over the 2018-25 period. The distribution across bundle types is similarly steady, with double-play (2-play) bundles accounting for around 42-44% of bundled subscriptions, triple-play (3-play) bundles for 35-40%, and quadruple-play (4-play) bundles for 18-21% (Figure 6).

Figure 6. Percentage of bundled communication services subscriptions in total fixed broadband

Source: OECD.

29. The specific components included in each type of bundle vary across markets. Triple-play bundles combining fixed broadband, fixed voice and television (FBB-FV-TV) are the most widely available, offered in 92% of OECD Member countries. Double-play bundles are offered in 81% of countries for fixed broadband and fixed voice (FBB-FV), 76% for fixed broadband and television (FBB-TV), and 61% for fixed broadband and mobile voice and data (FBB-MVD). When mobile voice and data (MVD) is added, either in a triple-play FBB-FV-MVD configuration or as part of a quadruple-play FBB-FV-MVD-TV bundle, availability falls to 54% and 57% respectively, though quadruple-play bundles remain an important and growing feature in several OECD markets (Table 1).

Table 1. Type of bundles available across OECD countries, 2026

	FBB-FV	FBB-TV	FBB-FV-MVD	FBB-FV-TV	FBB-FV-MVD-TV	FBB-MVD
Australia	✓		✓	✓		
Austria	✓	✓		✓		✓
Belgium	✓	✓	✓	✓	✓	✓
Canada	✓	✓		✓		✓
Chile	✓	✓		✓		
Colombia			✓	✓	✓	✓
Costa Rica	✓	✓	✓	✓	✓	
Czechia		✓		✓		✓
Denmark	✓	✓		✓		✓
Estonia	✓	✓		✓		
Finland		✓				✓
France	✓		✓	✓	✓	✓
Germany	✓		✓	✓	✓	
Greece	✓		✓	✓	✓	
Hungary	✓	✓	✓	✓	✓	✓
Iceland	✓	✓	✓	✓	✓	✓
Ireland	✓	✓	✓	✓	✓	✓
Italy	✓		✓	✓		
Japan	✓	✓		✓		
Korea	✓	✓	✓	✓	✓	✓
Latvia		✓		✓		

	FBB-FV	FBB-TV	FBB-FV-MVD	FBB-FV-TV	FBB-FV-MVD-TV	FBB-MVD
Lithuania		✓		✓	✓	
Luxembourg	✓		✓	✓	✓	
Mexico	✓	✓		✓		
Netherlands	✓	✓	✓	✓	✓	✓
New Zealand	✓		✓			✓
Norway	✓	✓		✓		✓
Poland		✓		✓	✓	✓
Portugal	✓			✓	✓	✓
Slovak Rep.	✓	✓	✓	✓	✓	✓
Slovenia		✓		✓	✓	✓
Spain	✓		✓	✓	✓	
Sweden		✓				✓
Switzerland	✓	✓	✓	✓	✓	✓
Türkiye	✓	✓		✓		
United Kingdom	✓	✓	✓	✓	✓	✓
United States	✓	✓	✓	✓	✓	✓
% countries offering the type of bundle	81%	76%	54%	92%	57%	61%

Source: OECD.

Stakeholder and workshop input

30. The WPCSI Workshop held on 4 April 2025 reinforced the need to revise the 2017 methodology for standalone services. There was strong agreement among delegates and participants that existing baskets no longer reflect actual consumer behaviour well, and broad consensus in favour of a simplified and more future-proof approach. During the Workshop, delegates and participants discussed several topics, including:

- The naming and number of baskets;
- The inclusion or exclusion of SMS;
- The integration of 5G for mobile voice and data, of fixed wireless access (FWA) and satellite for fixed broadband baskets;
- Contract lengths and depreciation periods;
- Data thresholds and the treatment of "unlimited" plans.

31. There was also interest in streamlining data collection, possibly automating parts of the process, and ensuring coherence with international organisations (ITU and EU) benchmarking frameworks. The insights from these discussions, together with written feedback received in response to the accompanying Room Document [\[DSTI/DPC/CSI/RD\(2025\)1\]](#), have guided the revisions presented in this document.

Objectives of the 2026 revision

32. The 2026 revision, covering both Standalone and Bundled communication services, ensures that the OECD's price basket methodologies continue to provide reliable, relevant, and internationally comparable measures of communication service prices, reflecting both the current structure of market offers and the actual usage patterns of consumers. The revision achieves the following key objectives:

- Reflect technological and market changes since 2017 for Standalone services and since 2020 for Bundled services, including the rollout of 5G, increasing demand for high-capacity fixed broadband, and the growing prevalence of OTT services in bundles;

- Focus on the most widely used baskets, and therefore those most relevant for policy, particularly for mobile voice and data and fixed broadband;
- Simplify the methodologies, reducing unnecessary complexity while preserving comparability and analytical depth;
- Update user profiles to align with real-world usage trends (e.g. increased data consumption, decreased use of SMS, voice and fixed voice, higher broadband speeds);
- Enhance international alignment with other benchmarking initiatives, such as those of the International Telecommunication Union (ITU) and the European Commission (EC);
- Ensure the methodologies remain forward-looking and relevant for at least the next five years.

The unified 2026 price basket methodology for communication services

33. The OECD price basket methodology, covering both standalone and bundled communication services, consists of two main components: general rules for selecting operators and collecting commercial offers, and parameters defining the structure of user profiles and the scope of services measured. These two elements together ensure that benchmarking results are robust, comparable, and reflective of real consumer experience across OECD Member countries.

34. Because bundled offers are built directly from standalone services, the two methodologies share a single, common set of general rules, and the bundled parameters for fixed broadband and mobile voice and data are drawn directly from the revised standalone parameters presented below. This section therefore sets out, in turn, the shared general rules, the standalone parameters for fixed broadband and mobile voice and data, and finally the parameters for bundled communication services, which build on the parameters of the previous two (i.e. fixed broadband and mobile voice and data).

General rules for the 2026 methodology

35. A set of general rules has underpinned the OECD's benchmarking work for years and continues to serve as the foundation for producing internationally consistent price comparisons. As part of the 2026 revision, these rules have been reviewed and, where necessary, clarified and harmonised. The following general rules apply to both the standalone and the bundled methodologies:

- Offers must be nationwide, i.e. available throughout the country. The term 'nationwide' does not cover sub-national or region-specific offers. However, in large countries with complex geography and historically fragmented communication sectors, an exemption may be applied.²
- The contract duration, or depreciation period, of the offers is 24 months (down from 36 months in the 2017 standalone methodology). The fixed connection and subscription costs are depreciated over this 24-month period.
- Flanker brands (subsidiary brands) may be included, one per main operator, if relevant.
- Operators are selected based on market share with the objective of covering at least a 70% market-share threshold (based on subscriptions) for both fixed broadband and mobile voice and data baskets. For fixed broadband baskets, the top three operators are selected, and if they do not collectively reach the 70% coverage, a fourth operator is included. For mobile voice and data baskets, the top two operators are selected, and if they do not collectively reach the 70% coverage, a third operator is included³.
- Only offers targeted at new residential customers are considered.
- Prices must be transparent, publicly available, and include all applicable taxes (e.g. VAT).

- Prices are converted using USD Purchasing Power Parity (PPP) to adjust for national price levels.
- The methodology focuses on service pricing; hardware costs (e.g. handsets, modems) are excluded from pricing calculations, unless purchase or rental is required by an operator.

36. For bundled communication services specifically, one additional rule applies: every bundled basket must include a fixed broadband subscription, with fixed broadband operators selected according to the same market-share rule described above.

Parameters for fixed broadband (FBB) services

37. The fixed broadband (FBB) usage profiles adopted in the 2026 methodology are based on speed tiers (10 Mbps, 100 Mbps, 300 Mbps, 500 Mbps, 1 Gbps, up to 5 Gbps) and may include optional data-volume thresholds, although unlimited data plans are increasingly standard. Six fixed broadband profiles are defined: low, medium-low, medium, medium-high, high and very high; together with three fixed wireless access (FWA) profiles (low, medium and high) and a low-usage profile for satellite subscriptions (non-geostationary orbit systems, at 100 Mbps) (Table 2).

Table 2. The 2026 fixed broadband price baskets based on user profiles' parameters

	Speed tiers ¹ (Mbps)	Data (GB)
Low	10	50
Medium-low	100	-
Medium	300	-
Medium-high	500	-
High	1000	-
Very high	5000	-
FWA – Low	10	50
FWA - Medium	100	100
FWA – High	500	300
Satellite (Non-geostationary orbit [NGSO] systems)	100	-

Notes :

1: Speed tiers categories apply to offers where the advertised speed is greater than or equal to the speed of the categories. If no data threshold is given, then it has an unlimited data allowance.

2 : Fixed wireless access (FWA) offers must use technologies corresponding to the following definition with three conditions: a) Includes fixed wireless technologies: LMDS, MMDS, Fixed WiMAX, stationary wireless broadband connections (e.g. via 4G (LTE) and 5G mobile technologies) other fixed-wireless transport technologies; b) does not include: Wi-Fi hotspots and mobile broadband technologies, such as dongles; c) subscriptions should be sold to a particular geographical address, and thus have a fixed point of use.

3 : Parameters from previous methodologies are available in the annex.

Source: OECD.

38. A special profile for Fixed Wireless Access has been added to reflect its growing use, particularly in areas lacking fibre infrastructure. FWA and satellite subscriptions accounted for only a small share of fixed broadband subscriptions in 2025 (6% and 1% respectively) but are growing rapidly, with a compound annual growth rate of 23.7% for FWA and 10.7% for satellite over the 2019-24 period, so maintaining separate baskets for both enables a clearer analysis of their evolving role within the fixed broadband market.

39. In the Annex, Table 5 below compares the new FBB user profile parameters with those used in the 2017 methodology, to illustrate how consumption patterns and the updated profiles reflect actual consumer offers available across OECD Member countries.

Parameters for mobile voice and data (MVD) services

40. The mobile voice and data (MVD) usage profiles adopted in the 2026 methodology are defined by typical usage combinations of voice minutes, SMS, and data volumes.⁴ These now include speed tiers (e.g. at least 4G for basic profiles, at least 5G for higher tiers), as well as distinctions between capped and unlimited data plans. Profiles range from entry-level (e.g. 1 GB, 70 minutes) to very high usage (e.g. unlimited data and voice with 5G). Five MVD profiles are defined: Basic, Low, Medium, High and Very high (Table 3).

Table 3. The 2026 mobile voice and data (MVD) price baskets based on user profiles' parameters

	Data allowance in GB	Minutes	SMS	Access technology	Speed tiers ¹ (Mbps)
Basic	1 (ITU)	70 (ITU)	50 (ITU)	-	-
Low	5	100	-	At least 4G	-
Medium	50 (EC)	600 (EC)	-	At least 4G	10 Mbps
High	100	UL	-	At least 5G	100 Mbps
Very high	UL	UL	-	At least 5G	500 Mbps

Notes: UL= unlimited. Cells with the ITU or European Commission (EC) annotations mean that OECD price basket profiles concerned are compatible with the baskets proposed by these organisations. Speed tiers categories apply to offers where the advertised speed is greater than or equal to the speed of the categories. For the Medium, High and Very high baskets, the condition to include the offer is to have an advertising of the technology (e.g. 4G/5G offers) or speed tier advertising in Mbps. Parameters from previous methodologies are available in the annex. Source: OECD.

41. This new approach balances simplicity, market relevance, and future-proofing, while maintaining continuity with past benchmarking practice. It is also comparable, for certain profiles, to the price baskets developed by other organisations: the basic profile aligns with the ITU methodology, and the medium profile aligns with the EC's baskets. Two baskets are reserved for offers that are "at least 5G", to analyse and compare how these plans are evolving across OECD countries.

Parameters for bundled communication services

Consistent with the building-block logic set out in the previous section, the bundled methodology does not define its fixed broadband and mobile voice and data parameters independently: it draws them directly from the revised parameters for standalone communication services presented, and combines them with a fixed voice indicator and a revised television component.

Overall bundle composition

42. The 2020 methodology for bundled communication services included six basket types across five user profiles, totaling 30 basket permutations, making results difficult to interpret and the data collection exercise unnecessarily complex. The 2026 methodology reduces this to eight baskets, structured as follows (Table 4):

- **Double-play baskets** (2 in total): FBB-TV (Low), and a newly added FBB-MVD (Medium) basket, which allows the methodology to remain future-proof on this developing market segment and comparable to the EC price basket.
- **Triple-play baskets** (4 in total), covering different usage levels of the most prevalent bundle configuration across the OECD: fixed broadband, fixed voice and television (FBB-FV-TV) at Medium, High and Very-high levels and a fourth triple-play basket for fixed broadband, fixed voice and mobile voice and data (FBB-FV-MVD).

- **Quadruple-play baskets** (2 in total): fixed broadband, fixed voice, mobile voice and data, and television (FBB-FV-MVD-TV) at Medium and High levels, reflecting a bundle type that remains less widely available but is increasing in prevalence.

Table 4. The 2026 bundled communication baskets based on user profiles' parameters

Basket type	No.	Basket	FBB Usage (GB)	FBB Speed (Mbps)	FV Voice	MVD Voice (mins)	MVD Data (GB)	Basic TV	Extra TV (OTT with ads)	Premium TV (OTT w/o ads)	Minimum live TV channels
2-play	1	FBB-TV (Low)	50	10				Yes	No	No	20
	2	FBB-MVD (Medium) [EC] ¹	Unlimited	300		600	50				
3-play	3	FBB-FV-TV (Medium)[EC] ²	Unlimited	300	Yes			Yes	No	No	20
	4	FBB-FV-MVD (Medium)	Unlimited	300	Yes	600	50				
	5	FBB-FV-TV (High) [EC] ³	Unlimited	1000	Yes			Yes	Yes	No	20
	6	FBB-FV-TV (Very High)	Unlimited	5000	Yes			Yes	No	Yes	20
4-play	7	FBB-FV-MVD-TV (Medium)	Unlimited	300	Yes	600	50	Yes	No	No	20
	8	FBB-FV-MVD-TV (High) [EC] ⁴	Unlimited	1000	Yes	Unlimited	100	Yes	Yes	No	20

Note: 1. EC=This basket corresponds to the European commission converged basket HH13; 2. EC=This basket corresponds to the European commission converged basket HH7; 3. EC=This basket corresponds to the European commission converged basket HH8; 4. EC=This basket corresponds to the European commission converged basket HH17. Parameters from previous methodologies are available in the annex.

Source: OECD.

The fixed broadband component of bundled communication services price baskets

43. The fixed broadband component of the bundled baskets reflects the speed tiers and data allowances defined in the revised standalone FBB methodology (see section on parameters above), applied to each of the seven bundle types.

The fixed voice component of bundled communication services price baskets

44. Fixed voice usage has continued to decline across OECD countries, reflecting both the growth of mobile-only households and the increasing reliance on OTT communication services such as WhatsApp, Zoom and Teams. Even within bundles, fixed voice or Voice over Internet Protocol (VoIP) service is typically included as a default component of the commercial offer but is infrequently used by consumers. Given this declining importance, the 2026 methodology simplifies the fixed voice component, recording only whether a fixed voice service is available within a bundle, rather than measuring its usage in detail.

The mobile voice and data component of bundled communication services price baskets

45. Changes in market trends and usage patterns for mobile voice and data have already been addressed through the revision of the standalone MVD methodology: data usage continues to rise while traditional voice calls and SMS volumes decline, with an increasing share of communication carried out through OTT services. The mobile voice and data component of the bundled baskets is transposed directly from the revised Standalone MVD parameters.

The television component of bundled communication services price baskets

46. The 2020 bundled methodology's TV component relied on minimum channel requirements ranging from 10 channels at the basic level to 150 at the very-high level, and differentiated baskets based on whether a digital video recorder (DVR) and premium movie or sports channels were included.

47. These elements are now outdated. The evolution of TV service offers, including the growth of "light bundles" (core or basic packages that emerged as offers matured and providers streamlined their advertised TV and broadband features) and the increasing integration of OTT video services, calls for an updated and more internationally comparable approach.

48. The 2026 methodology replaces channel counts, premium movies and premium sports with three simplified TV categories: "Basic TV" services, corresponding to live linear television, "Extra TV" corresponding to basic TV services plus an eligible standard OTT video subscription with advertisement and Premium TV services, corresponding to Basic TV services plus an eligible high-end OTT video subscription without advertisement. To ensure that TV baskets retain a meaningful live TV component and remain distinct from OTT-only services, all TV baskets include a minimum of twenty (20) live linear television channels, applied as a baseline criterion that does not itself differentiate between basket tiers.

49. OTT video services have become an integral component of bundles, and in most OECD markets have even replaced traditional Pay-TV services. To ensure consistency and comparability, the methodology defines eligible OTT services by reference to a clearly specified set of illustrative examples, drawn from both internationally available platforms and national or regional ones:

- Widely available international OTT platforms, such as: Netflix, Amazon Prime Video, Disney+, Apple TV+, Paramount+, Peacock, MUBI and Crunchyroll;
- Comparable OTT services that primarily target a national or regional market, such as: Canal+ (France), Crave (Canada), Stan (Australia), Naver, TVING and Wavve (Korea), Globoplay (Brazil), ViX (Mexico and Latin America), Rakuten TV (Europe), BritBox and ITVX (United Kingdom), U-Next (Japan), HBO Max (USA). These are illustrative examples only, and this is not an exhaustive list: the precise set of eligible OTT services in each OECD Member country is expected to be reviewed periodically to reflect the evolving streaming landscape.

50. These services are included because they are widely available across OECD countries, have standardised subscription tiers, and are commonly bundled with TV offers, typically at the basic advertising level. Delegates will be invited to share the relevant OTT providers in their respective countries.

51. Within the TV component, the "Basic TV" service (minimum 20 live channels) is assigned to the low and medium user profiles, while the "Extra TV" ("Basic TV" service plus an eligible OTT subscription with ads) is assigned to the high user profiles and the "Premium TV" service ("Basic TV" service plus an eligible OTT subscription without ads) is assigned to the Very-high user profiles.

Summary of the bundled revisions

52. Taken together, the following changes have been made to the 2020 bundled communication baskets methodology:

- The final basket set is reduced to eight baskets: two double-play, four triple-play and two quadruple-play baskets.
- The fixed broadband and mobile voice and data components are aligned with the revised standalone methodology.
- The fixed voice component is simplified to a binary indicator of availability.

- The TV component replaces channel counts, premium movies and premium sports with three categories: Basic TV, Extra TV and Premium TV, based on live-channel minimums and OTT eligibility.
- All TV baskets include a minimum of twenty live linear television channels.
- Eligible OTT services are defined through illustrative (non-exhaustive) examples of widely available international and national or regional platforms (e.g. Netflix, Amazon Prime Video, Disney+, Canal+, Crave, Stan).
- Basic TV service is assigned to “Low” and “Medium user” profiles, Extra TV service is assigned to “High user” profiles and Premium TV service to “Very-high” profiles.

Conclusion

53. The unified “2026 OECD price basket methodology for communication service” presented in this document offers a coherent, simplified, and future-proofed framework for benchmarking the prices of communication services across OECD Member countries, whether purchased on a standalone basis or as part of a bundle. Its central strength lies in its architecture: rather than revising the standalone and bundled methodologies as separate exercises, this revision treats them as embedded elements, with the standalone parameters for fixed broadband and mobile voice and data as the building blocks from which the methodology for bundled communication services is directly constructed. This ensures full consistency between what is measured on a standalone basis and what is measured within a bundle, while substantially reducing overall complexity: from 30 basket permutations to eight bundled baskets, and from an outdated, call-and-SMS-centric standalone framework to one built around today's speed tiers, data allowances, and 5G, FWA and satellite technologies.

54. The revised methodology also better reflects the realities of today's connectivity landscape: the rapid rise in fixed broadband speeds, the sharp growth in mobile data consumption, the commercial rollout of 5G, and the central role that OTT services now play in both mobile communication and media consumption. More fundamentally, it responds to the continued convergence of communication services, defined as the ongoing merging of fixed, mobile, broadcasting and OTT offers into single household packages, by ensuring that the OECD's benchmarking tools converge accordingly, rather than measuring standalone and bundled prices through two disconnected frameworks. By aligning selected baskets with the benchmarking frameworks of the ITU and the EC, the unified methodology also strengthens international comparability, and by internalising data collection, the OECD reinforces the long-term sustainability, transparency and public-good nature of this benchmarking activity. Together, these changes are designed to keep the methodology relevant and forward-looking for at least the next five years, even as new technologies continue to emerge.

Annex A. Annex 1.A. Parameters applying to past methodologies: The 2017 standalone and the 2020 bundled price baskets methodology

Table A A.1. Former 2017 FBB baskets parameters

Minimum download speed (Mbps)	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

Source: OECD (2017[4]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP/2017/4/FINAL\]](#).

Table A A.2. Former 2017 MVD baskets

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

Source: OECD (2017[4]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP/2017/4/FINAL\]](#).

Table A A.3. Former 2017 Overall destination and time distribution

Basket	M2F	On-net	Off-net	Voicemail	Day	Evening	Weekend
30 calls basket	15%	55%	28%	2%	46%	27%	27%
100 calls basket	15%	55%	28%	2%	46%	27%	27%
300 calls basket	15%	55%	28%	2%	46%	27%	27%
900 calls basket	15%	55%	28%	2%	46%	27%	27%

Source: OECD (2017[4]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP/2017/4/FINAL\]](#).

Table A A.4. Former 2017 Mobile voice call duration Call duration (minutes / call)

Basket	M2F	On-net	Off-net	Voicemail
30-calls basket	2.0	1.6	1.7	0.9
100-calls basket	1.4	1.9	1.8	1.0
300-calls basket	2.0	2.0	1.8	1.0
900-calls basket	1.9	2.1	1.9	1.1

Source: OECD (2017[4]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP\(2017\)4/FINAL\]](#)

Table A A.5. Former 2017 SMS distribution (Destination and Time of day)

Basket	On-net	Off-net	Peak	Off-peak
30-calls basket	53%	47%	66%	34%
100-calls basket	53%	47%	66%	34%
300-calls basket	53%	47%	66%	34%
900-calls basket	53%	47%	66%	34%

Source: OECD (2017[4]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP\(2017\)4/FINAL\]](#).

Table A A.6. Former 2020 bundled baskets

			FBB		FV	MVD		Pay TV			
		Baskets	Usage (GB)	Speed (Mbps)	Voice calls (mins)	Voice allowance (mins)	Data allowance (GB)	Nb of channels	Premium movies	Premium Sports	DVR
2 play	1	FBB-FV (Basic)	15	2	20						
	2	FBB-FV (Low)	60	25	20						
	3	FBB-FV (Medium)	120	100	60						
	4	FBB-FV (Medium)	240	250	60						
	5	FBB-FV (High)	360	600	140						
	6	FBB-FV (Very High)	900	1000	140						
	7	FBB-TV (Basic)	15	2				10	FALSE	FALSE	FALSE
	8	FBB-TV (Low)	60	25				20	FALSE	FALSE	FALSE
	9	FBB-TV (Medium Low)	120	100				30	TRUE	FALSE	FALSE
	10	FBB-TV (Medium High)	240	250				40	TRUE	FALSE	FALSE
	11	FBB-TV (High)	360	600				80	TRUE	TRUE	TRUE
	12	FBB-TV (Very High)	900	1000				150	TRUE	TRUE	TRUE
3 play	13	FBB-FV-TV (Basic)	15	2	20			10	FALSE	FALSE	FALSE
	14	FBB-FV-TV (Low)	60	25	20			20	FALSE	FALSE	FALSE
	15	FBB-FV-TV (Medium Low)	120	100	60			30	TRUE	FALSE	FALSE
	16	FBB-FV-TV (Medium High)	240	250	60			40	TRUE	FALSE	FALSE
	17	FBB-FV-TV (High)	360	600	140			80	TRUE	TRUE	TRUE
	18	FBB-FV-TV (Very High)	900	1000	140			150	TRUE	TRUE	TRUE
	19	FBB-FV-MVD (Basic)	15	2	20	70	4				

4 play	20	FBB-FV- MVD (Low)	60	25	20	60	1				
	21	FBB-FV- MVD (Medium Low)	120	100	60	200	5				
	22	FBB-FV- MVD (Medium High)	240	250	60	200	10				
	23	FBB-FV- MVD (High)	360	600	140	600	20				
	24	FBB-FV- MVD (Very High)	900	1000	140	600	30				
	25	FBB-FV- MVD-TV (Basic)	15	2	20	0	0	10	FALSE	FALSE	FALSE
	26	FBB-FV- MVD-TV (Low)	60	25	20	60	1	20	FALSE	FALSE	FALSE
	27	FBB-FV- MVD-TV (Medium Low)	120	100	60	200	5	30	TRUE	FALSE	FALSE
	28	FBB-FV- MVD-TV (Medium High)	240	250	60	200	10	40	TRUE	FALSE	FALSE
	29	FBB-FV- MVD-TV (High)	360	600	140	600	20	80	TRUE	TRUE	TRUE
	30	FBB-FV- MVD-TV (Very High)	900	1000	140	600	30	150	TRUE	TRUE	TRUE

Source: OECD (2020), "OECD bundled communication price baskets", OECD Digital Economy Papers, No. 300, OECD Publishing, Paris.

Annex B. Annex 1.B. General rules applying to all baskets of the 2017 price basket methodology and changes

55. As outlined in the 2017 methodology, several general “rules” apply to all baskets (OECD, 2017^[1]). The list below indicates proposed changes for the 2026 methodology in red font, with proposed deletions to the 2017 methodology struck out (OECD, 2017^[1]) :

- “The number of operators covered in each country is defined by each service basket.
- **If a geographical (postal) address is required to collect prices, services will reflect the offers available in the country’s main city, unless stated otherwise.** ~~Services shall reflect the offers in the main city of the country, unless otherwise specified.~~
- The range of published tariff packages presented on the operator website shall be covered, allowing the lowest cost offer to be calculated for each operator and basket.
- The tariff elements included shall allow calculation of basic end user cost as close to real costs as possible, based on the basket definitions for each service.
- Discounts shall be incorporated in the calculations of prices for each basket. Typical discounts to include are:
 - Promotional discounts on monthly rental and/or connection charges. Promotional offers shall be available for at least one month, and valid at the time of data collection.
 - Off-peak discounts on calls and messages.
 - Selective discounts to specific, selected phone numbers.
 - Usage allowances in the form of included traffic, or included usage value.
- Only tariffs presented as currently available to a new customer shall be considered.
- Combinations of basic tariff packages and add-on packages are allowed (e.g. for additional data on mobile voice tariffs).
- Devices (handset, modem, tablet etc.) shall not be included unless specified in the service basket rules.
- Only residential tariffs shall be included in published basket results, unless otherwise specified in the service basket rules. Business prices may however still be collected for the tariff database.
- Results shall reflect the prices applied to regular monthly payment for the service. Direct debit payment prices may be used. Discounts for long-term payments shall not be included.
- The value of call, message and data allowances included in the tariff package will be deducted from the usage element of the basket, up to the value of actual usage.
- ~~Call costs are calculated using the duration of $D + (\text{Unit}(\text{seconds}) - 1)/2$, based on basket call duration D converted to seconds and average per second charges. Unit is the billing unit in seconds. See Annex for further information.~~

- For each service a range of baskets are defined. It is not the intention that all of these baskets shall be used for analysis of any particular market, as some of the basket may describe usage that is clearly not relevant for that market. Please use care in applying or reporting results that are based on baskets that are inappropriate for a particular market.”

Annex C. Annex 1.C. General rules of the 2017 price basket methodology and changes that apply to fixed broadband (FBB)

Table 5. Former 2017 General rules and changes for 2026 General rules: FBB baskets

Operators	The top three providers in each country shall be covered, ranked by market share. The combined market share shall be at least 70%. ~~Providers must operate nationwide, unless the country has a wide geographical spread (e.g. Australia, Canada, the United States). In such cases, providers from different major city areas may be included. The 70% market share rule applies to the country as a whole. The geographical coverage of the providers is not considered, and in countries with wide geographical spread (e.g. United States) providers in different main city areas may be included. The 70% rule does however apply to the country as a whole.~~ ~~Discount brands offered by the covered network operators (i.e. “flanker” brands) can be included when clearly linked from the discount brand’s website to the network operator’s website and brand – one per main operator, if relevant. The discount brand is covered under the parent company.~~
Service specification	Fixed broadband services for residential users, provided over: • ADSL • Cable and fibre networks • Wimax • Fixed location LTE/5G
Depreciation	Service lifetime is ~~3~~ 2 years (i.e. 24 months). Nonrecurring charges and promotional discounts are distributed over ~~3~~ 2 years.
Type of offer	Tariffs shall describe a new installation of fixed broadband service, for a new customer.
Number of baskets	~~There are 45~~ 9 baskets, over ~~5~~ 7 speed tiers, of which 3 baskets are specifically for fixed wireless access offers. Some of the baskets have associated data allowances. If no data allowance is defined in the user profile, then it has an unlimited data allowance. ~~and 3 groups of usage:~~ ~~• Low data volume~~ ~~• Medium data volume*~~ ~~• High data volume~~ The ~~five~~ speed tiers are defined by their minimum speed. Offers with a speed equal to or above the minimum may be considered for the basket results. ~~* As most fixed broadband services offer unlimited data usage only the Medium usage volume will be included in published OECD results.~~
Usage price information	Overage data usage applied after any allowance is exhausted, per MB.
Allowances	Where an allowance or fair use limit is exceeded and the service is stopped or speed reduced until the end of the billing period, the package will not be included in the basket results.
Other fees	Where the provider, on their website, clearly identifies the existence of and need to pay an additional Access Fee to the network operator (“Incumbent Access Fee”), such fee shall also be included in the basket calculations.
Results presentation	Results are presented in USD / PPP per month, including VAT. Nominal exchange rates can be used. Business offers shall not be included in OECD results.

Note: Proposed changes to the 2017 rules are noted in red font and proposed deletions are struck out.

Source: OECD (2017^[1]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP\(2017\)4/FINAL\]](#).

¹ In Africa, see Research ICT Africa (2024), *Mobile Pricing (RAMP): Voice SMS Basket*. In Latin America, see Galperin and Ruzzier (2013), “Price elasticity of demand for broadband: Evidence from Latin America and the Caribbean”, *Telecommunications Policy*, Vol. 37/6-7, pp. 429-438. Moreover, academics analysing communication mergers often use the OECD price baskets, for example, Genakos, Valletti, and Verboven (2018), “Evaluating Market Consolidation in Mobile Communications”, *Economic Policy* 33(93): 45-100.

² For example, by allowing either the top three operators or a 70% market-share threshold for fixed broadband, and either the top two operators or a 70% threshold for mobile voice and data.

³ In large countries not covered by “nationwide” offers rule, the exemption allows for flexibility: for fixed broadband, either the top three operators or the 70% threshold must be met, while for mobile voice and data, either the top two operators or the 70% threshold applies.

⁴ A large majority of delegates requested to retain the Mobile Voice and Data (MVD) basket name rather than change it to alternatives such as “Mobile broadband”.

Annex D. Annex 1.D. General rules and basket parameters in the 2017 methodology and changes that apply to mobile voice and data

Table 6. Former 2017 General rules and changes for 2026 General rules: MVD baskets

Operators	At least the two largest network operators are covered for each country, based on subscriber numbers. The operators covered should have at least ~~50%~~ 70% of the market share between them. Discount brands offered by the covered network operators can be included ~~when clearly linked from the discount brand's website to the network operator's website and brand~~ – one per main operator, if relevant . The discount brand is covered under the parent company.
Service specification	Offers shall include 3G, 4G and 5G mobile phone services, covering Post-paid, Pre-paid and SIM only tariffs. Handsets are not included.
Depreciation	Service lifetime is ~~3~~ 2 years (i.e. 24 months). Nonrecurring charges and promotional discounts are distributed over ~~3~~ 2 years.
Type of offer	Tariffs shall describe a new connection of a single mobile phone service, for a new customer.
Number of baskets	There are ~~42~~ 5 baskets split into 3 groups: • Basic package ~~No data use~~ (2 ~~1~~ basket) • ~~Low data and~~ At least 4G access technology ~~message use~~ (5 ~~2~~ baskets) • ~~High data and~~ At least 5G access technology ~~message use~~ (5 ~~2~~ baskets) Each group includes different levels of voice calls, ~~messages (SMS)~~ and data use (GB). Some define levels of messages (SMS), speed tiers or access technology (4G or 5G). The fifth basket level in each group covers unlimited data, voice, at least 5G and 500 Mbps speed tier SMS. Speed tiers categories apply to offers where the advertised speed is greater than or equal to the speed of the categories.
Usage price information	Voice calls to: • ~~Local fixed lines~~ • ~~National fixed lines~~ • ~~On-net mobile network~~ • ~~Off-net mobile networks, weighted by market share~~ • ~~Voicemail retrieval~~ SMS messages • ~~On-net message~~ • ~~Off-net messages~~ Mobile data used on handset
Allowances	~~Voice and message allowances are deducted in the following order: Selective discounts, most restricted minute allowance, least restricted minute allowance, message allowance, value allowance. Specific volume discounts will be deducted from the total cost at the end.~~ Voice and message allowances and add-on packages for SMS and data can be included.
Results presentation	Results are presented in USD / PPP per month, including VAT. Nominal exchange rates can be used.

Note: Proposed changes to the 2017 rules are noted in red font and proposed deletions are struck out.

Source: OECD (2017^[1]), Revised OECD Telecommunication price baskets [\[DSTI/CDEP/CISP\(2017\)4/FINAL\]](#).

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