

VTKE survey on freedom of choice of terminal equipment

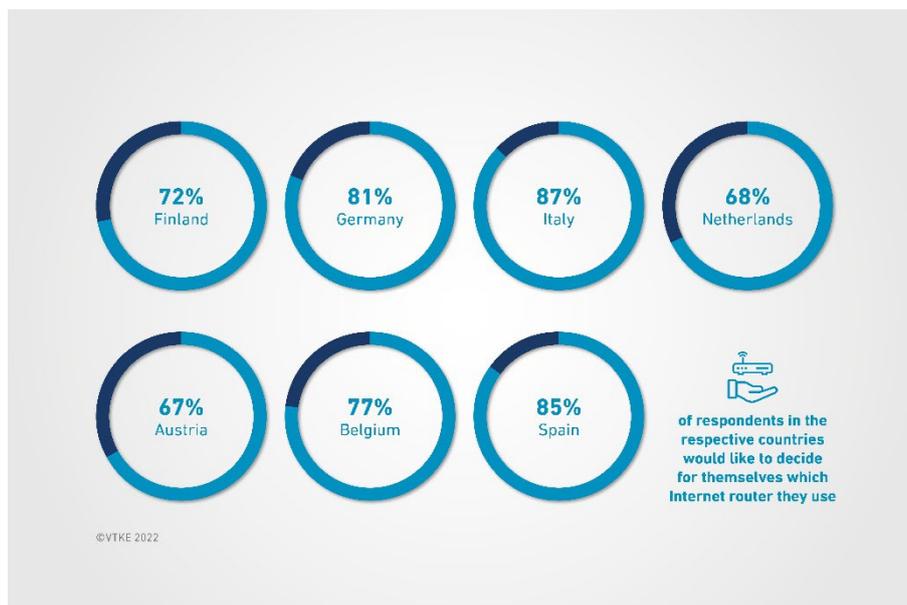
## Survey in seven EU countries: Desire for free router choice is very strong everywhere

Berlin, 29.03.2022 – Users do not want their provider to stipulate which terminal device they use at their internet connection. This was the result of a representative survey conducted by the Alliance of Telecommunications Terminal Equipment Manufacturers (VTKE) in Belgium, Germany, Finland, Italy, Netherlands, Austria and Spain. Freedom of choice over the terminal device at the internet connection is of particular importance to consumers in these seven EU countries.

The most important survey results at a glance:

- In all countries, at least two-thirds of those surveyed consider the free choice of terminal device at their internet connection to be particularly important.
- In countries where there is no regulation on the free choice of terminal equipment, a very clear majority of consumers want free choice over the terminal device they use at their internet connection.
- Where free choice of terminal equipment is already anchored in regulation, it's widely and enthusiastically used. On average, around 50 percent of those surveyed plan to purchase their own terminal device the next time they change devices.

Once again the survey results show: free choice of terminal equipment is proving to be a successful model in all countries, meeting users' wishes and at the same time ensuring future innovation through competition for the best terminal device.





Survey results from countries **with** freedom of choice of terminal equipment:

### Germany

In Germany, free choice of terminal equipment was introduced by law for all access technologies (fiber, cable, and DSL) on 1 August 2016. For example, 81 percent of respondents now consider freedom of choice over the terminal device on their broadband connection to be somewhat or very important. Half of those surveyed currently use a device they purchased themselves at home; only 45 percent rent a device from their provider.

### Finland

In Finland, free choice of terminal equipment has been in place since 2014. For 72 percent of respondents freedom of choice is somewhat or very important. 61 percent of those surveyed would choose their own device again the next time they change devices, while only 18 percent would choose a provider device.

### Italy

Since 2018, users in Italy have been able to decide for themselves about what terminal equipment they want to use thanks to a decision by the regulatory authority AGCOM. A remarkable 87 percent of respondents consider this freedom of choice and decision-making to be somewhat or very important. More than half (52 percent) plan to buy a device themselves the next time they have to get a new one. Just under a third (31 percent) want to use the device offered by their provider.

### Netherlands

In the Netherlands, the free choice of terminal device on the internet connection was only recently introduced by the regulatory authority ACM - at the end of January 2022. More than two thirds (68 percent) of those surveyed consider this freedom of choice and decision-making to be particularly important. 35 percent of consumers are currently planning on buying their own terminal device the next time they switch devices, 45 percent would choose a device from the network provider, while 20 percent are still undecided.

Survey results from countries **without** freedom of choice of terminal equipment:

### Belgium

In Belgium, it's generally not possible for most users to choose their own terminal device for their broadband connection. To date, there has been no national regulation. However, according to its working plan for 2022, the Belgian regulator BIPT plans to launch a public consultation on free choice of terminal equipment before the end of the first quarter. Here, too, a clear majority of 77 percent considers freedom of choice to be important. 24 percent use their own device on their connection if the network provider allows this, 62 percent have a provider device.

### Austria

In Austria, the new Telecommunications Act (TKG 2021), which went into effect on 1 November 2021, has given the regulatory authority RTR the power to enable freedom of choice for consumers.



However, RTR has not yet announced any concrete plans regarding this. Here, too, a majority of two thirds (67 percent) considers freedom of choice to be important. If they had the freedom to choose, 40 percent of respondents would want to buy their own terminal device the next time they switch, 30 percent would use the provider device, and 25 percent are still undecided.

## Spain

In Spain, too, it's generally not possible for end-users to use a device they've chosen themselves with their broadband connection. An overwhelming majority of 85 percent considers freedom of choice to be important. 20 percent of respondents use their own terminal device, while 75 percent got theirs from their provider. Next time, however, 39 percent would opt for their own device if they had free choice of terminal device; 47 percent would want to use the provider device.

On a country-by-country basis, users were asked whether freedom of choice over the terminal device connected to the internet is important or would be important (if they live in a country that doesn't have freedom of choice of terminal equipment). The survey also asked whether the next time they change device, it would be a device they purchase themselves or one provided by their provider. A distinction was made between countries in which the free choice of terminal equipment is already legally binding (Germany, Finland, Italy and the Netherlands) and those in which there is currently no national regulation on the free choice of terminal equipment.

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*Source: VTKE survey conducted by market research institute Kantar from 3 to 7 February 2022. Representative panel for each country, ages 16 to 65*

*Note: Irrespective of the absence of binding regulation on the free choice of terminal equipment in the countries mentioned, individual network operators in these countries already allow their customers to choose the terminal equipment on their internet connection themselves, either depending on the access technology or comprehensively.*