



Communications market report

2024–2025

December 2025



Acknowledgment of country

The ACCC acknowledges the traditional owners and custodians of Country throughout Australia and recognises their continuing connection to the land, sea and community. We pay our respects to them and their cultures; and to their Elders past, present and future.

Australian Competition and Consumer Commission
Land of the Ngunnawal people
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List of acronyms

A2P SMS	application-to-person SMS
ACCC	Australian Competition and Consumer Commission
ACMA	Australian Communications and Media Authority
ADSL	asynchronous digital subscriber line
CCA	<i>Competition and Consumer Act (2010)</i>
CVC	connectivity virtual circuit
DSL	digital subscriber line
FTTC	fibre-to-the-curb
FTTP	fibre-to-the-premises
FTTN	fibre-to-the-node
GB	gigabyte
GHz	gigahertz
HFC	hybrid fibre coaxial
LEO	low Earth orbit
Mbps	megabits per second
MOCN	Multi-Operator Core Network
MNO	mobile network operator
MVNO	mobile virtual network operator
NBN	National Broadband Network
RKR	record keeping rule
RSP	retail service provider
SAU	Special Access Undertaking
SBAS	superfast broadband access service
VoIP	voice over internet protocol
WACC	weighted average cost of capital
WAPC	weighted average price control

Market snapshot

Annual advertised price changes in telecommunications services in Australia

This ACCC pricing analysis compares June 2025 advertised prices collected from retailers’ websites with June 2024 advertised prices, showing the nominal monthly advertised price excluding discounts for:

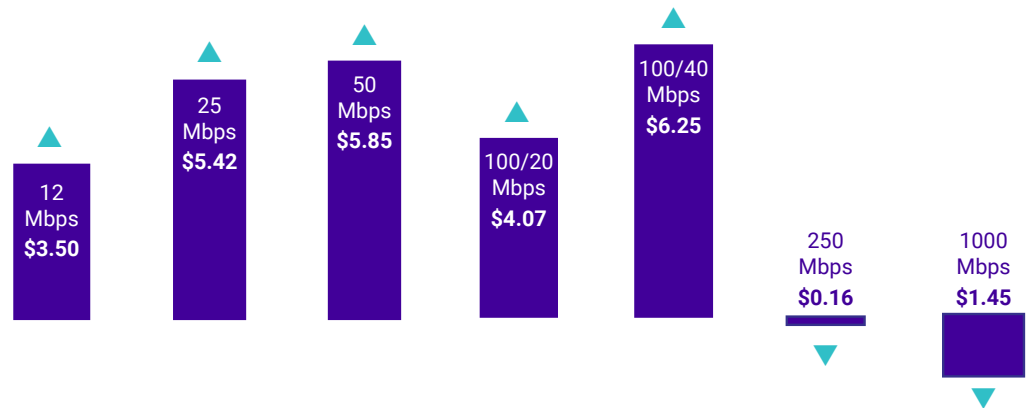
- 25th percentile (low-range price, where 25% of plans sampled are below this price)
- median (mid-range price, where this figure is middle value of our data set)
- 75th percentile (high-range price, where 75% of plans sampled are below this price).

NBN fixed broadband – all plans

Download speed	Low-range price	Mid-range price	High-range price
12/1 Mbps	\$51 ▼ 1.6%	\$60 ▲ 8.9%	\$70 ▲ 7.3%
25/5 – 10 Mbps	\$63 ▼ 2.2%	\$70 ▲ 1.4%	\$75 ▲ 5.3%
50/20 Mbps	\$80 ▲ 6.1%	\$84 ▲ 5.6%	\$89 ▲ 6.0%
100/20 Mbps	\$89 ▲ 5.0%	\$94 ▲ 5.0%	\$95 — flat
100/40 Mbps	\$99 ▲ 10.3%	\$100 ▲ 0.1%	\$105 — flat
250/25 Mbps	\$102 ▲ 2.0%	\$110 — flat	\$115 ▼ 3.8%
1000/50 Mbps	\$110 — flat	\$120 ▼ 4.8%	\$129 ▼ 0.4%

■ Most popular speed tier for NBN fixed broadband plans ([NBN Wholesale Market Indicators Report – June Quarter 2025](#)).

NBN fixed broadband – changes in comparable products, 2024 to 2025



Non-NBN fixed broadband

Download speed	Low-range price	Mid-range price	High-range price
12 Mbps	\$60 ▲ 3.0%	\$65 ▲ 7.5%	\$80 ▲ 30.4%
25 Mbps	\$64 — flat	\$69 — flat	\$75 ▲ 5.3%
50 Mbps	\$70 ▼ 3.4%	\$79 ▼ 0.6%	\$87 ▼ 2.2%
100/20 Mbps	\$89 ▲ 0.3%	\$94 ▲ 4.4%	\$99 ▼ 1.7%
100/40 Mbps	\$89 — flat	\$95 ▼ 5.0%	\$105 ▼ 1.9%
250 Mbps	\$99 — flat	\$110 — flat	\$128 ▼ 0.8%
1000 Mbps	\$99 ▼ 13.5%	\$120 ▼ 7.0%	\$150 ▲ 15.4%

Note: The prices presented in this table do not include non-NBN satellite or home wireless broadband.

Mobile phone

Brand	Low-range price	Mid-range price	High-range price
Mobile network operator – flagship	\$49 ▲ 8.9%	\$59 ▲ 7.3%	\$69 ▲ 3.0%
Mobile network operator – sub-brands	\$25 — flat	\$35 ▲ 16.7%	\$45 ▲ 12.5%
Mobile virtual network operator	\$27 ▲ 7.2%	\$35 ▲ 2.9%	\$49 — flat

Mobile broadband

Plan	Low-range price	Mid-range price	High-range price
All samples	\$25 ▲ 13.6%	\$35 ▼ 12.5%	\$55 ▼ 5.2%

Advertised price approach to price monitoring

The ACCC's analysis uses advertised pricing from the month of June to estimate prices for telecommunications products. The data on market offers is drawn annually from Critical Information Summaries, which retailers publish on their websites. This means that the prices for legacy plans that customers may still be on are not considered.

Prices used in the analysis are the ongoing price and do not include temporary discounts. Unless otherwise stated, pricing analysis does not take into account changes in product features, such as data allowances or other inclusions.

The broadband analysis in this report considers speed tiers and the network technology as major price differentiating factors. The mobiles analysis considers service provider type as the major pricing factor.

Key market developments



Network investment and technology developments have increased broadband speeds



Optus/TPG Telecom regional network sharing arrangement came into effect



Satellite is changing how customers access and use telecommunications services

Key ACCC projects



NBN replacement module application process commences



Access determination inquiries completed for several declared services



Optus and Telstra fined as compliance remains a priority



Monitoring functions expanded with the introduction of the NBN service quality and network performance RKR

Executive summary

This is the ACCC's annual report on Australian telecommunications markets for 2024–25. The report includes an overview of key market developments and identifies trends and emerging issues. It also assesses the changes in advertised prices (which we use as a proxy for charges paid by consumers) for internet and voice services, and examines competitive safeguards within the telecommunications industry.

The National Broadband Network (NBN) underwent significant change in 2024–25, as NBN Co continued to invest in the expansion and augmentation of its fibre and fixed wireless networks. The number of customers on broadband plans with higher download and upload rates continued to grow, as consumers benefitted from NBN Co's wholesale price reductions for some higher speed services. Overall, NBN Co increased its average wholesale pricing by 4.08% for 2024–25 as it sought to grow its residential average revenue per user – which rose from \$47 per month to \$50 per month over the financial year.¹

NBN Co's network upgrades also appear to be having an impact on the speed and reliability of broadband services for end-users. Over 2024–25, the ACCC's Measuring Broadband Australia Program observed improved download speeds for NBN fixed wireless plans, and recorded results where average busy hours download speeds for NBN fixed-line connections exceeded 100% of plan speeds for the first time in the program's history.² However, the Measuring Broadband Australia reports found that FTTN connections continued to underperform in terms of download speeds, while record keeping rule data showed that FTTN and FTTC services consistently experienced the most dropouts among connection types for 2024–25.³

During 2024–25, the increasing utilisation of low Earth orbit (LEO) satellite technology continued to influence the direction of both the broadband and mobile markets. Starlink sustained growth in its Australian customer base for fixed broadband services, while Amazon progressed towards a planned mid-2026 launch of its Amazon Leo (formerly known as Project Kuiper)⁴ satellite service as a prospective competitor in the market. The announcement of NBN Co's commercial agreement with Amazon to deliver NBN wholesale satellite services over Amazon Leo highlights the role LEO satellites are set to play in providing fixed broadband connectivity to less densely populated areas of Australia going forward.⁵

LEO satellite technology also continues to impact the future delivery of mobile services in Australia. Telstra launched the first LEO satellite direct-to-device SMS service in June 2025, while other mobile network operators are expected to commence direct-to-device offerings in the near future which will provide outdoor mobile services to locations outside the terrestrial network. In February 2025, the Australian Government announced plans to establish a Universal Outdoor Mobile Obligation, which would leverage the adoption of LEO satellite technology to ensure access to outdoor mobile voice and SMS services for consumers across Australia.⁶

1 NBN Co, SAU Price Control Model FY25–FY27, 1 May 2024; and NBN Co, ['Annual Report 2025'](#), 5 September 2025, p 95, accessed 1 December 2025.

2 ACCC, ['Measuring Broadband Australia – Report 29 – June 2025'](#), 27 June 2025, accessed 1 December 2025.

3 ACCC, ['Service quality and network performance record keeping rule for superfast broadband networks'](#), 22 August 2025, accessed 1 December 2025.

4 Amazon, ['Project Kuiper is now Amazon Leo'](#), 13 November 2025, accessed 1 December 2025.

5 NBN Co, ['NBN Co selects Amazon's Project Kuiper to bring Low Earth Orbit \(LEO\) satellite broadband to Australia'](#), 5 August 2025, accessed 1 December 2025.

6 Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts, ['Albanese Labor Government building Australia's mobile future'](#) [media release], 25 February 2025, accessed 1 December 2025.

The ACCC collects information on key telecommunications markets through its record keeping rules and provider websites. Over 2024–25, the ACCC observed in the data that it collects that although the 4 largest wholesale access seekers continue to dominate NBN connections, their combined market share decreased for the sixth consecutive year, which reflects price and product-based competition from smaller retailers, both incumbent and new. The median advertised price for NBN fixed-line broadband services increased across 2024–25, while NBN Co's changes to wholesale pricing were reflected in lower price points for higher speed tiers and increasing price points for lower speed tiers.

Telstra, Optus and TPG Telecom continued to dominate the retail market for mobile services during 2024–25. The 3 national mobile network operators and their sub-brands held a collective market share of 87%, while challenger mobile virtual network operators maintained incremental gains over recent years to reach a combined market share of 13%. Mobile consumers faced persistent price increases from the major flagship brands, as Telstra, Optus and TPG Telecom raised the monthly prices for their entry-level post-paid mobile plans by 7.7%, 5.8% and 8.1%, respectively.

There were notable developments in telecommunications infrastructure over 2024–25, as some service providers sought to reposition themselves or focus on particular market segments. After the ACCC announced in September 2024 it would not oppose the proposal, Optus and TPG Telecom launched a regional network sharing arrangement in January 2025. This arrangement allows Optus to use TPG Telecom spectrum in certain regions, in exchange for providing TPG Telecom with access to the Optus network in these areas.⁷ In March 2025, the ACCC announced it would not oppose Vocus Group's proposed acquisition of TPG Telecom's enterprise, government and wholesale business.⁸ In deciding not to oppose the acquisition, the ACCC concluded that the transfer of assets to Vocus was not likely to substantially lessen competition in any relevant market.

Telecommunications, as an essential service, remains an enforcement and compliance priority for the ACCC. In October 2024, the ACCC commenced Federal Court proceedings alleging that Optus engaged in unconscionable conduct in contravention of the Australian Consumer Law when selling telecommunications goods and services to vulnerable consumers that they often did not want or need. In September 2025, the Federal Court imposed a \$100 million penalty, while Optus provided the ACCC with an undertaking to compensate impacted consumers and improve its internal systems.⁹ Following proceedings initiated by the ACCC in 2022, the Federal Court found in February 2025 that Telstra made false or misleading representations relating to the upload speed of residential broadband internet services supplied to some of its Belong customers in late 2020.¹⁰ In October 2025, the Federal Court imposed an \$18 million penalty on Telstra.

The ACCC also undertook a broad range of telecommunications regulatory work in 2024–25. These projects included conducting public inquiries into access determinations for a number of telecommunications services, consulting on the replacement module for NBN Co's next regulatory cycle under its Special Access Undertaking, and updating and developing appropriate record keeping rules in order to support effective monitoring and transparency across markets, among others.

7 ACCC, '[Optus Mobile Pty Ltd and TPG Telecom Limited proposed network and spectrum sharing](#)', 5 September 2024, accessed 1 December 2025.

8 ACCC, '[Vocus' proposed acquisition of TPG enterprise, government and wholesale business not opposed](#)', 20 March 2025, accessed 1 December 2025.

9 ACCC, '[Federal Court orders Optus to pay \\$100m penalty for unconscionable conduct](#)', 24 September 2025, accessed 1 December 2025.

10 ACCC, '[Telstra found to have misled nearly 9,000 Belong customers over broadband speed claims](#)', 21 February 2025, accessed 1 December 2025.

1. Introduction

The ACCC releases the Communications market report every year. It details competitive safeguard activities in the Australian telecommunications industry and reports on the prices paid by consumers (using advertised prices as a proxy) for telecommunications services, as required by the *Competition and Consumer Act 2010* (CCA).

The report details the work undertaken by the ACCC over the past 12 months. The ACCC's role is to promote competition and protect consumers. In the telecommunications sector, this includes economic regulation through access and pricing functions, monitoring and reporting, and compliance and enforcement activities under the CCA and other telecommunications specific legislation.

The structure of this report is as follows:

- Chapter 2 highlights key developments from the last year that have influenced telecommunications markets and the ACCC's work in those markets.
- Chapter 3 sets out the retail pricing and consumer trends for the 2024–25 financial year, using advertised pricing from the month of June to estimate prices.
- Chapter 4 reviews the ACCC's engagement in the sector and outlines ACCC actions that have been taken to safeguard both competition and consumers.

2. Key market developments

2.1 A year of transition for the National Broadband Network

NBN Co continued to invest heavily in the expansion and augmentation of its fixed wireless and fibre networks in 2024–25, delivering faster speeds and more reliable services for end-users on these access technologies.

In contrast, services delivered on NBN Co's copper-based technologies, especially fibre to the node, continued to lag in terms of reliability and speed, while broad scale investment in HFC networks, which are used in capital cities, was avoided.

Wholesale pricing structures were further simplified during the year, with CVC charges reducing ahead of their removal from all fixed-line and fixed wireless services by the end of FY2026. Total access revenues still grew driven by uptake of higher yielding, very high-speed services combined with an average price increase in line with the change in the consumer price index.

Total NBN services in operation remained steady across the year, as compared to a moderate growth that had been forecast. The number of fibre services in operation grew by close to 500,000 as households and businesses migrated away from copper-based connections, and some additional premises were connected.

On the other hand, the number of NBN fixed wireless and satellite services reduced with LEO satellites providing an alternative form of access to high-speed broadband. Significant improvements to NBN Co's fixed wireless network and its decision to transition wholesale services from its Sky Muster geostationary satellite network to the Amazon Leo satellite network are expected to provide faster and more reliable broadband for regional, rural and remote communities, and may provide greater options for fixed voice services in the most remote areas of Australia.

Although the 4 largest wholesale access seekers continue to dominate NBN connections, their combined market share decreased for the sixth consecutive year, which reflects price and product-based competition from smaller retailers, both incumbent and new.

2.1.1 NBN Co increases wholesale prices as it continues to move towards efficient cost recovery

Under its weighted average price control (WAPC) applying to price regulated products under its special access undertaking with the ACCC, NBN Co was permitted to increase these prices by no more than 4.10%¹¹ on average in 2024–25. In submitting its Tariff List for 2024–25 in May 2024, NBN Co specified an average price increase of 4.08% for the year.¹²

As permitted under the operation of the WAPC and within the bounds of additional individual price controls applying to residential grade products, NBN Co increased a number of its lower speed residential products by more than the average increase of 4.08% and a number of its higher speed

11 The change in CPI between the December quarter 2023 and the December quarter 2024.

12 NBN Co, SAU Price Control Model FY25–FY27, 1 May 2024.

residential products by less than this average increase, including some instances where it reduced prices.¹³

NBN removed monthly usage (CVC) charges on most 100 Mbps and above residential grade services in 2023–24 and has committed to removing CVC charges on most lower speed residential grade services by 1 July 2026. In 2024–25 the monthly CVC charge for lower speed residential grade products (excluding satellite) was \$4.50 per Mbps, down from \$5.50 per Mbps for 2023–24.¹⁴

Accompanying NBN Co's individual product price changes between 2023–24 and 2024–25, there was an increase in the share of higher speed services sold compared to lower speed services over this time. This contributed to NBN Co's residential average revenue per user (ARPU) increasing from \$47 per month in June 2024 to \$50 per month in June 2025.¹⁵

This trend towards higher speed services is likely to continue following NBN Co's commencement of its 'Accelerate Great' initiative in September 2025. The program introduces additional value for very high-speed services in FTTP and HFC areas, including increasing the wholesale speed of NBN Co's Home Fast 100/20 Mbps plan to 500/50 Mbps at no extra charge.¹⁶

As retailers purchase a different mix of wholesale services, they will have experienced different changes in their costs of accessing the NBN. We would therefore expect to see differences in impacts on retail pricing with a resulting effect on competition in the retail market. As a likely reflection of this, there was an increase in the overall market share of smaller retailers, that tend to compete more strongly in the market for higher speed services. These services have tended to have smaller wholesale price rises than lower speed services and also been a beneficiary of NBN Co's network and speed upgrades (see below).

2.1.2 NBN Co continues to upgrade its network to improve broadband performance and revenue opportunities

NBN Co has continued to upgrade its network to improve service quality and meet the anticipated future needs of end-users. NBN Co considers there to be increased demand for faster internet speeds among homes and businesses across Australia and is continuing to invest in the network to meet future demand.

NBN Co's recent initiatives to improve its network and uptake of very high-speed broadband have included:

- FTTN/FTTP Program – By the end of calendar year 2025, NBN Co aims to expand eligibility and availability for around 3.5 million premises served by Fibre to the Node (FTTN) and 1.5 million premises served by Fibre to the Curb (FTTC) to upgrade to Fibre to the Premises (FTTP). NBN Co expects that by the end of 2030, more than 95% of the remaining approximately 622,000 FTTN premises will be eligible for a full fibre upgrade.¹⁷ NBN Co estimates that the cost of upgrading the remaining 622,000 FTTN premises to full fibre will be around \$5 billion over a 15-year period.¹⁸

13 NBN Co, SAU Price Control Model FY25–FY27, 1 May 2024. The key individual price controls applying to NBN Co in 2024–25 were the change in CPI for the entry level product (25/5 Mbps) and the higher of the change in CPI or 5% for other residential grade products.

14 NBN Co, '[NBN Co Special Access Undertaking](#)', 13 December 2013, p 241, accessed 1 December 2025.

15 NBN Co, '[Annual Report 2025](#)', 5 September 2025, p 95, accessed 1 December 2025.

16 NBN Co, '[NBN Co to accelerate higher speed tiers and launch multi-gigabit speeds in September 2025](#)' [media release], 5 September 2024, accessed 1 December 2025.

17 NBN Co, '[Momentum builds as work commences on the final stage of fibre to the node upgrade program](#)' [media release], 5 September 2025, accessed 1 December 2025.

18 Hon Anika Wells MP, Minister for Communications, '[Special Access Undertaking \(NBN Transformation Projects\) Government Policy Project Notice 2025](#)', 12 November 2025, accessed 1 December 2025.

- Increasing the reach of higher download speeds over its fibre to the premises (FTTP) and hybrid fibre coaxial (HFC) networks, with the number of services acquired with a wholesale speed tier of close to 1 Gbps almost doubling over the year from a low base.¹⁹
- Accelerate Great Program – Launched in September 2025, this program intends to significantly enhance broadband speeds by upgrading selected existing higher speed tiers while maintaining the same monthly charge and introducing new multi-gigabit options on the FTTP and Hybrid Fibre Coaxial (HFC) networks.²⁰
- Fixed Wireless Upgrade Program – NBN Co has undertaken a significant upgrade of the NBN Fixed Wireless network by increasing both its capacity and coverage to help improve broadband services across regional Australia. The program, which concluded in December 2024, saw the total number of cells in the network increase nearly 4-fold, from 23,000 to approximately 92,000.²¹ NBN Co completed this upgrade in December 2024, choosing to exceed its forecast capital budget of \$750 million with a view to meeting its longer-term forecasts of demand for network capacity and higher speed products. The Australian Government provided a \$480 million grant towards the cost of this upgrade.²²

These network upgrades are intended to both support the introduction of higher broadband speed offers across the relevant access technologies, as well as improve busy hour speeds, reliability and other quality indicators important to customers. NBN Co forecasts that these changes will encourage households and businesses to upgrade to higher speed tier services, and increase its revenue per user.

However, we note from NBN Co's FY2025 expenditure report:

- HFC network capital expenditure is lower than budgeted. This reduction is primarily due to revised deployment of Distributed Access Architecture (DAA) Upgrades adopting a just in time strategy.²³ Consequently, NBN Co underspent its HFC and transit capital expenditure forecasts by 56% and 27% respectively, consistent with its capital management initiatives to defer HFC and transit capacity investments into a later period.²⁴
- NBN Co's total capital expenditure to complete the Fixed Wireless upgrade program exceeded budget by \$153 million.²⁵ Further, while overall network capacity and performance has materially improved (as discussed in section 4.6.3 of this report), a number of homes and businesses have not experienced the expected benefits of the upgrade program due to shortfalls in geographic coverage and a temporary reduction in the availability of the highest speed tier (Fixed Wireless Superfast).²⁶
- The number of NBN Co's active services for FY2025 (~8.8 million) was around 171,000 or 2% below its forecast for the year.²⁷ This reflects that the number of active TC-4 services remained largely unchanged between June 2024 and June 2025.²⁸

19 ACCC, '[Wholesale Market Indicators Reports](#)', June 2024 and June 2025, accessed 1 December 2025.

20 NBN Co, '[NBN's biggest internet upgrade: Faster speeds for more Australian homes and businesses](#)' [media release], 16 September 2025, accessed 1 December 2025.

21 NBN Co, '[NBN Co maintains strong customer focus with annual service improvement plan](#)' [media release], 23 July 2025, accessed 1 December 2025; and ACCC, '[Service quality and network performance record keeping rule for superfast broadband networks](#)', 27 November 2025, accessed 1 December 2025.

22 NBN Co, '[NBN Fixed Wireless upgrade program completed for 800k homes and businesses](#)' [media release], 14 February 2025, accessed 1 December 2025; and NBN Co, '[Special Access Undertaking Annual Expenditure Report for the year ended 30 June 2025 \(public version\)](#)', 28 November 2025, p 17, accessed 1 December 2025.

23 NBN Co, '[NBN Co's replacement module application, Chapter 8 – Expenditure in the current regulatory cycle](#)', p 29, accessed 1 December 2025.

24 NBN Co, '[SAU Annual Expenditure Report for the year ended 30 June 2025](#)', Table D, pp 15–18, accessed 1 December 2025.

25 NBN Co, '[SAU Annual Expenditure Report for the year ended 30 June 2025](#)', Table D, p 15, accessed 1 December 2025.

26 NBN Co, Operations Bulletin, 24 September 2025, p 1.

27 NBN Co, '[SAU Annual Expenditure Report for the year ended 30 June 2025](#)', Table B1, p 12, accessed 1 December 2025.

28 NBN Co, '[SAU Annual Expenditure Report for the year ended 30 June 2025](#)', Table B1, p 12, accessed 1 December 2025.

2.1.3 Upgraded NBN fixed wireless network delivers faster internet speeds, while FTTN connections continue to underperform

NBN Co completed a \$750 million Fixed Wireless and Satellite Upgrade Program in February 2025,²⁹ increasing capacity on its fixed wireless network and expanding the footprint to enable more than 120,000 former satellite-only eligible premises to access NBN fixed wireless services. The upgrade has enabled NBN Co to introduce faster fixed wireless wholesale speeds, including an uplift to its Fixed Wireless Plus plan (from 75/10 Mbps to 100/20 Mbps), and the introduction of two new higher speed plans: Fixed Wireless Home Fast (200–250/8–20 Mbps) and Fixed Wireless Superfast (400 Mbps/10–40 Mbps).

The ACCC's Measuring Broadband Australia Program has identified performance improvements on NBN fixed wireless services following the completion of the upgrade program. This includes increases in the average busy hour download and upload speeds measured on the NBN Fixed Wireless Plus plan, as identified in the March 2025 report (see section 4.6.3 of this report for further findings from the ACCC's Measuring Broadband Australia reports).³⁰

NBN Co has reported improved average busy period downlink and uplink performance across its fixed wireless network in the quarterly reports provided as part of the NBN service quality and network performance RKR.³¹ During the month of June 2025, over 90% of fixed wireless services achieved average busy period downlink speeds exceeding 100 Mbps.³²

In relation to households with a fibre to the node (FTTN) NBN connection, the ACCC's Measuring Broadband Australia Program has found that FTTN connections are more likely to experience underperforming download speeds than any other fixed-line connection type.³³ In particular, there still remains a cohort of households with FTTN connections that rarely, if ever, achieve download speeds close to their plan's download speed. The ACCC's 30th Measuring Broadband Australia report identified that FTTN connections with plan download speeds of 50 or 100 Mbps accounted for 86% of all underperforming connections based on data measurements taken from 1 May to 31 May 2025.³⁴

According to data from the NBN service quality and network performance record keeping rule, services on FTTN and FTTC connections experienced the highest number of dropouts per 1,000 services consistently across the last 12 months, with FTTP connections performing the best.³⁵

2.1.4 Wholesale speed upgrades and pricing structures flowing through to access seekers and retail offerings

The gradual withdrawal of CVC pricing has improved competition by providing wholesale access seekers with greater certainty of costs and removed the need to manage costs by moderating the quality of services during the busy hours.

29 NBN Co, '[nbn Fixed Wireless upgrade program completed for 800k homes and businesses](#)', 15 February 2025, accessed 1 December 2025.

30 ACCC, '[Measuring Broadband Australia – Report 28 – March 2025](#)', 20 March 2025, accessed 1 December 2025.

31 ACCC, '[Service quality and network performance record keeping rule for superfast broadband networks](#)', 4 March 2025 and 22 August 2025, accessed 1 December 2025.

32 ACCC, '[Service quality and network performance record keeping rule for superfast broadband networks](#)', 22 August 2025, accessed 1 December 2025.

33 ACCC, '[Fibre to the node trails all other NBN connection types for download speeds](#)' [media release], 4 September 2025, accessed 1 December 2025.

34 ACCC, '[Measuring Broadband Australia – Report 30 – September 2025](#)', 4 September 2025, accessed 1 December 2025.

35 ACCC, '[Service quality and network performance record keeping rule for superfast broadband networks](#)', 22 August 2025, accessed 1 December 2025; ACCC, '[Service quality and network performance record keeping rule for superfast broadband networks](#)', 4 March 2025, 31 March 2025, 30 Jun 2025, 22 August 2025, accessed 1 December 2025.

Many retailers launched new or revised plans in higher speed tiers leading up to and after the launch of NBN Co's Accelerate Great Program in September. Challenger retailers have so far successfully competed on price in these tiers compared to larger incumbent retailers. NBN Co's program to upgrade FTTC (approximately 10.3% market share at June 2025) and FTTN (27.7%) connections, to FTTP (30.9%) has also meant more households have become eligible to upgrade their connection to support higher speed services.³⁶

Introductory discounts are commonly available at various price points, and a range of services are available bundled with a new NBN plan. These include streaming and entertainment app inclusions, and discounted mobile, electricity and gas services.

At the same time, some add-on services such as email and home gateways (modems and routers), are increasingly unbundled from an NBN service. The latter appears to support a rise in consumer interest in bringing their own (BYO) devices to use with a new service.

2.2 LEO satellite services continue growth, direct-to-device services launched

Low Earth orbit (LEO) satellites are those that circle around the Earth at much lower altitudes (around 160 km to 2,000 km) than other satellites. A constellation of LEO satellites is required to provide continuous coverage of an area or for full coverage of Earth.

By orbiting closer to Earth, LEO satellites allow for higher data speeds and lower latency than traditional geostationary satellites. They may also provide a lower cost alternative to providing mobile coverage in regional and remote areas compared to terrestrial networks.

During 2024–25, developments in LEO satellite technology continued as we have observed changes in how consumers currently access telecommunications services now and into the future.

In the fixed broadband market, Starlink has continued to grow its Australian customer base, after launching here in 2021. Starlink reported over 250,000 Australian customers as of July 2024.³⁷ Latest figures reported by Starlink to the ACCC show its Australian customer count has grown to 375,000 retail customers.³⁸ Amazon's LEO satellite service, Amazon Leo, expects to launch in Australia in mid-2026 and will provide fixed broadband services in direct competition with Starlink.

NBN Co has announced it will phase out its Sky Muster service which had been due to reach its end of life in 2032. In August 2025, NBN Co announced that it had reached a commercial agreement with Amazon to use its satellite technology to offer wholesale services to the more than 300,000 premises in regional and remote areas of Australia that lie outside the NBN terrestrial network.³⁹ Vocus has also reached an agreement with Starlink to purchase a Layer 2 wholesale satellite service enabling Vocus to offer its own retail services over the network directed at enterprise and government end-users.⁴⁰

36 ACCC, '[Wholesale market indicators report – June 2025](#)', 22 August 2025, accessed 1 December 2025.

37 Starlink, @Starlink, '[Starlink now serves high-speed internet to more than a quarter million active Aussie customers, connecting ~2.5% of homes across Australia](#)', [X post], 27 July 2024, accessed 1 December 2025.

38 ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025.

39 NBN Co, '[NBN Co selects Amazon's Project Kuiper to bring Low Earth Orbit \(LEO\) Satellite broadband to Australia](#)', 5 August 2025, accessed 1 December 2025.

40 Vocus, '[Vocus creates Australian first "private highway" over Starlink for secure enterprise connections](#)', 16 June 2025, accessed 1 December 2025.

In the mobile services market, Telstra, in collaboration with SpaceX's Starlink, became the first national mobile network operator to offer a LEO satellite direct-to-device service to its customers. In June 2025, Telstra announced the launch of its satellite messaging service to consumer and small business customers on eligible plans with compatible devices. The service will allow users to send and receive text messages from an outdoor location outside the coverage reach of its terrestrial network.⁴¹ Telstra reported that in the first week of the service launching over 1 million text messages were sent or received.⁴²

TPG Telecom completed its first successful direct-to-device SMS trial with Lynk Global in May 2025, with further SMS trials planned throughout 2025.⁴³ These trials follow a partnership announcement between TPG Telecom and Lynk Global in August 2024.⁴⁴

In July 2023, Optus announced a partnership with SpaceX to trial the integration of LEO satellites with its terrestrial mobile network to provide direct-to-device services.⁴⁵ However, Optus' plan to launch direct-to-device services in late 2024, initially with SMS, were delayed due to SpaceX reportedly facing US regulatory delays.⁴⁶ Optus has not announced a revised timeline for the launch of these services.

In February 2025, the Australian Government announced it will establish a Universal Outdoor Mobile Obligation leveraging direct-to-device LEO satellite services as part of a modernised universal services framework. The policy aims to ensure mobile voice and SMS services are reasonably available across Australia by adding up to 5-million square kilometres of outdoor mobile coverage. Legislation to enable the Universal Outdoor Mobile Obligation policy was introduced in November 2025, with the default commencement of these obligations in late 2027.⁴⁷

2.3 Persistent price increases in the mobile market

Consistent with pricing trends observed in recent years, the national mobile network operators increased the prices of their post-paid flagship brand mobile plans again during 2024–25:

- In May 2025, Telstra announced that it would be increasing the price of some of its post-paid plans by \$5 a month from 1 July 2025. Telstra increased the monthly price of its entry-level post-paid plan to \$70 (7.7% increase), its mid-range plan price jumped 6.7% to \$80 per month, while its highest priced post-paid plan remained unchanged at \$99 per month.⁴⁸ These price increases were not accompanied by higher data allowances.
- TPG Telecom announced in June 2025 that it would be increasing the monthly price of flagship Vodafone brand's post-paid plans by \$4 from July 2025. This change resulted in monthly increases of 8.1%, 6.8% and 5.8% respectively for its cheapest, mid-range and most expensive plans. Data allowances on the affected plans were increased by between 10 and 40GB per month.⁴⁹

41 Telstra, '[It's landed – Australia's first satellite to mobile text messaging product for eligible mobile customers](#)', 7 June 2025, accessed 1 December 2025.

42 Telstra, '[Six days ago, I posted about the launch of Telstra Satellite Messaging and since then there's already been over 1 MILLION text messages sent or received](#)', [Facebook post], 13 June 2025, accessed 1 December 2025.

43 TelcoTitans, '[Australia's TPG completes first D2D satellite trials with Lynk](#)', 9 May 2025, accessed 1 December 2025.

44 Finder, '[TPG strikes satellite deal to erase mobile dead zones – a rural rescue or Optus rivalry?](#)', 28 August 2024, accessed 1 December 2025.

45 Optus, '[Together Optus and SpaceX Plan to Cover 100% of Australia](#)', 12 July 2023, accessed 1 December 2025.

46 EFTM, '[Exclusive: Optus' plans for 100% mobile coverage of Australia delayed by SpaceX and US Regulators](#)', 7 September 2024, accessed 1 December 2025.

47 Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts, '[Albanese Labor Government building Australia's mobile future](#)', [media release], 25 February 2025, accessed 1 December 2025.

48 Telstra, '[We've made some changes to our plan prices](#)', May 2025, accessed 1 December 2025.

49 WhistleOut, '[Vodafone's mobile plans just got more expensive](#)', 10 July 2025, accessed 1 December 2025.

- In April 2025, Optus flagged a \$3 per month price increase across its post-paid mobile plans, effective from 4 June 2025. The monthly price rises were between 3.7% for the most expensive post-paid plan (now \$85) and 5.8% for the cheapest post-paid plan (now \$55). Data allowances for these plans were increased by 20GB and 40GB per month, respectively.⁵⁰

Optus also increased the prices of its pre-paid mobile plans in 2024–25, with an accompanying increase in data allowances for all affected plans.⁵¹ However, the higher data allowances continue to be well above the average monthly data usage for retail pre-paid customers (9 GB).⁵²

There were also price increases with respect to sub-brands offered by the mobile network operators, such as Belong, and services offered by some mobile virtual network operators, such as Dodo and Everyday Mobile (Woolworths).⁵³

The persistent, year-on-year price increases in the mobile market continue to have a substantial impact on consumers because 87% of end-users have a post-paid or pre-paid plan with one of the national mobile network operators (such as Telstra, Optus or Vodafone).

As outlined in Chapter 3, since 2023–24, the median advertised price for mobile phone services across all sampled providers increased by 6.4% per month (or \$2.40).

Similar to observations made in previous years' reports, it is unclear the extent to which consumers value the higher data allowances which have been offered in return for higher plan prices in many cases. The data allowances offered by the national mobile network operators, even on the lowest priced plans, are well above the average monthly reported post-paid and pre-paid data usage. The data allowances offered on the low-range price post-paid plan for all 3 mobile network operators are now either 50GB or 60GB per month.⁵⁴ For the 3-months ending June 2025, the average monthly data usage for retail post-paid customers was 18.9 GB.⁵⁵

2.4 Infrastructure developments

2.4.1 Optus and TPG Telecom launch regional network sharing arrangement

In 2024, Optus and TPG Telecom entered into 3 interrelated agreements as part of a regional network sharing arrangement. The parties sought informal clearance from the ACCC with respect to this proposed arrangement in mid-2024. In September 2024, the ACCC announced that it would not oppose the proposed arrangement on the basis that it would not substantially lessen competition in the mobile services market.⁵⁶

In January 2025, Optus and TPG Telecom launched their regional network sharing arrangement. As a result of the arrangement, Optus can use certain TPG Telecom spectrum in regional areas to supply mobile services, while Optus provides TPG Telecom with access to its network in these areas.

50 Canstar Blue, '[Optus mobile price rise: Will you pay more?](#)', 15 April 2025, accessed 1 December 2025.

51 WhistleOut, '[Optus prepaid plans are getting a price rise and a data boost in April](#)', 4 March 2025, accessed 1 December 2025.

52 ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025.

53 Belong, '[Changes to our mobile plans](#)', May 2025, accessed 1 December 2025; WhistleOut, '[Dodo mobile refresh adds 5G, axes cheapest plan](#)', 2 October 2024, accessed 1 December 2025; Everyday Mobile, '[Changes to our \\$25 Everyday Mobile Postpaid plan](#)', October 2024, accessed 1 December 2025.

54 As at 6 August 2025.

55 ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025.

56 ACCC, '[Optus Mobile Pty Ltd and TPG Telecom Limited proposed network and spectrum sharing](#)', 5 September 2024, accessed 1 December 2025.

Access to a greater quantity of spectrum will enable Optus to provide additional capacity and coverage in regional areas. The arrangement also means Optus will likely be able to accelerate its 5G network rollout, bringing forward the completion of its regional 5G network to the end of 2030 instead of 2032.

TPG Telecom can now access Optus' network in the relevant regional areas to offer 4G and 5G retail and wholesale services. TPG Telecom's flagship mobile brand, Vodafone, has claimed expanded nationwide coverage from around 400,000 to 1 million square kilometres as result of the arrangement.⁵⁷

The impact of the Optus and TPG Telecom regional network sharing agreement on competition in the mobile market remains to be seen. In the short term, the arrangement has not deterred price increases from the national mobile network operators, as noted in section 2.3 of this report.

2.4.2 Vocus acquisition of TPG Telecom fixed networks

In October 2024, Vocus announced its proposal to acquire TPG Telecom's fixed-line business, enterprise and government and wholesale customer base as well as its fibre and transmission networks. The ACCC decided not to oppose the acquisition as it considered the acquisition was not likely to substantially lessen competition in any relevant market. More information about the ACCC's assessment is provided in Chapter 4 of this report. Vocus completed the acquisition on 30 July 2025.⁵⁸

57 Vodafone, '[We've doubled our network coverage](#)', January 2025, accessed 1 December 2025.

58 Vocus, '[Vocus completes acquisition of TPG Telecom's EGW fixed business and fibre assets](#)', 30 July 2025, accessed 1 December 2025.

3. Pricing and consumer trends

The ACCC's analysis in this chapter uses advertised pricing from the month of June, drawn annually from Critical Information Summaries, to estimate prices for telecommunications products. This means that the prices of legacy plans that customers may still be on are not considered.

Prices used in the analysis refer to the ongoing price and do not include temporary discounts. Unless otherwise stated, pricing analysis does not take into account changes in product features, such as data allowances or other inclusions.

The prices in this chapter include the Goods and Services Tax (GST).

3.1 Retail NBN fixed broadband services

Fixed broadband services are internet services provided to a fixed location.

This section focuses on NBN services that are provided over fibre-based and other fixed networks, with some limited analysis on NBN satellite services.⁵⁹

3.1.1 Services in operation

Over 2024–25, NBN Co reported a 0.13% increase in the number of wholesale consumer fixed-line and fixed wireless services in operation to 8.726 million services.⁶⁰ Reporting by major retailers under the ACCC's Internet Activity Report covers 7.219 million retail NBN broadband services as at June 2025, or approximately 82% of NBN services (fixed-line and fixed wireless).⁶¹ This indicates that a portion of NBN services (approximately 1.502 million) were on-sold by NBN access seekers to the NBN reseller market, or were supplied by NBN Co to smaller retailers not covered by the ACCC's Internet Activity reporting.

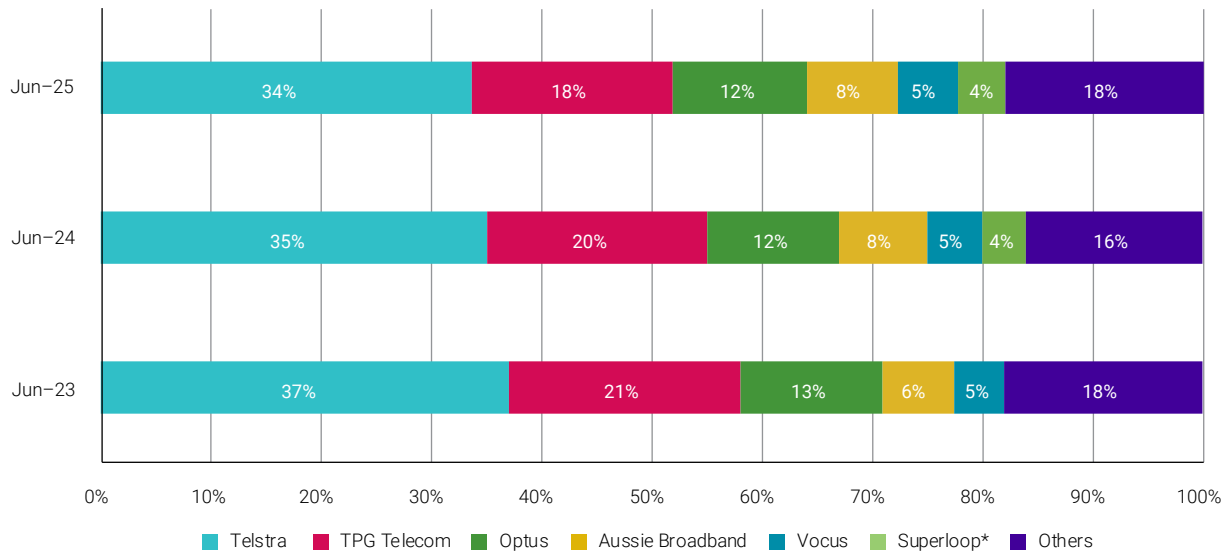
In June 2025, Telstra had the largest market share of NBN fixed broadband services (34%), followed by TPG Telecom (18%) and Optus (12%). Despite these retailers holding the largest market share, this represents a decrease of approximately 3% of the total consumer NBN market from 2023–24. Competing retailers Aussie Broadband, Vocus and Superloop have seen their share slightly increase to the previous financial year, from just above 16% to approximately 18% collectively. As shown in Figure 1, smaller retailers not captured by the Internet Activity record keeping rule have increased their share by 1.5% or approximately 132,000 services between 2022–23 and 2024–25.

⁵⁹ NBN fixed wireless has been included in the analysis of fixed broadband services due to the functional similarity between fixed wireless and other fixed access technologies.

⁶⁰ ACCC, '[NBN Wholesale Market Indicators Report – June quarter 2025 report](#)', 22 August 2025, accessed 1 December 2025; ACCC, '[NBN Wholesale Market Indicators Report – June quarter 2024 report](#)', 27 August 2024, accessed 1 December 2025. Excludes NBN wholesale satellite services.

⁶¹ ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025. See section (4)(1) for major retailers in ACCC, '[Internet Activity Record Keeping and Reporting Rules – September 2024](#)', 25 September 2024, accessed 1 December 2025.

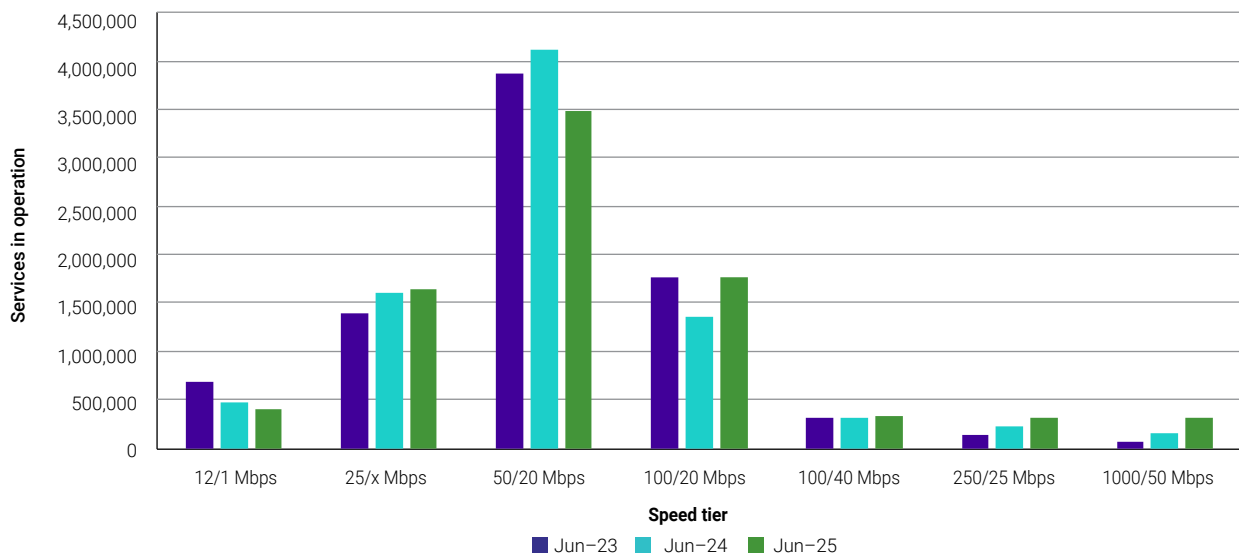
Figure 1: Retail NBN market share (major retailers only), 2022–23 to 2024–25



Note: Superloop is included in the Others category for 2023.
Source: ACCC Internet Activity Reports and NBN Wholesale Market Indicators Reports.

Figure 2 illustrates that the 50 Mbps download/20 Mbps upload speed tier remains the most popular choice for consumers of NBN fixed-line broadband. However, consumer preferences do appear to be shifting towards the 100/20 Mbps tier. As highlighted in Section 2.1.2, consumers on FTTP and HFC technologies and subscribed to the 100/20 tier were all upgraded to 500/50 Mbps services, which will likely change the distribution of customers for future years.

Figure 2: NBN fixed-line broadband wholesale services by speed tier, 2022–23 to 2024–25

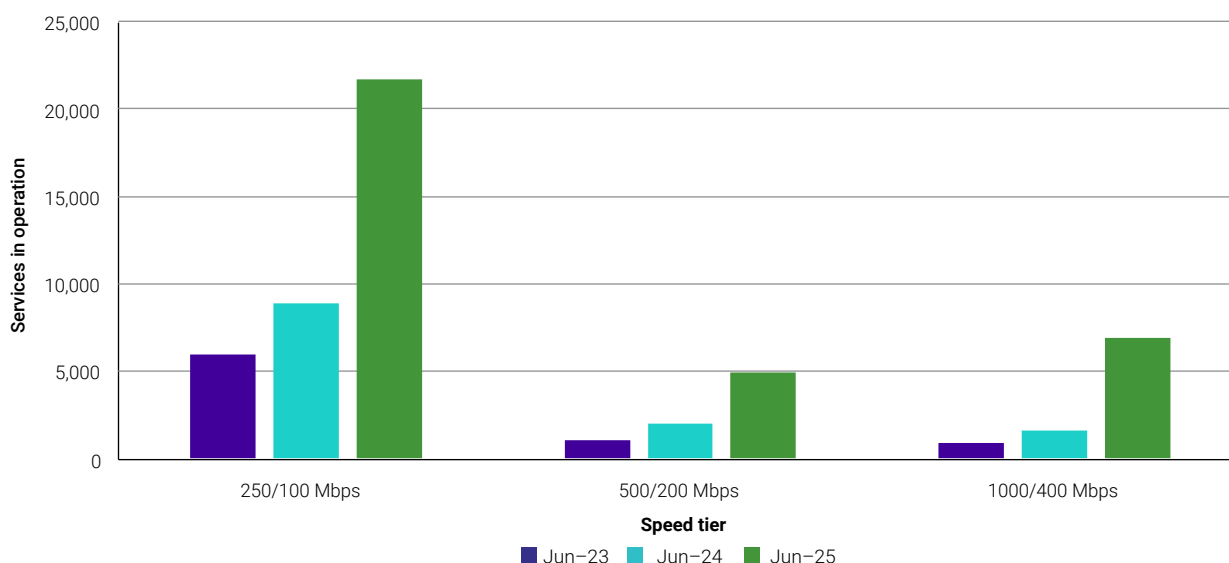


Note: 25/5 Mbps and 25/10 Mbps speed tiers are combined as retailers tend to offer one of the 2 plans, rather than both.
Source: [NBN Wholesale Market Indicators Report – June quarter 2025 report](#).

The 250/25 Mbps and 1000/50 Mbps speed tiers have continued to see customer growth, in line with reduced wholesale prices for the higher speed tiers. The market share of 250 Mbps and above NBN fixed-line services has tripled, from 2.7% to 8.2%, between 2022–23 and 2024–25. In line with previous trends, consumers were also less frequently choosing the 12/1 Mbps tier, which had a 13% decrease in services, and unlike previous years, this was not accompanied by a similar increase in 25 Mbps services.

As shown in Figure 3, 2024–25 also saw large increases in the number of consumers choosing high upload speed plans. This increase corresponds to significant decreases in retail prices, enabled by decreased wholesale costs that began in the 2024–25 financial year. As a likely result of the wholesale pricing changes, more retailers are offering these plans to residential consumers, where previously they were typically only marketed to business consumers.

Figure 3: NBN fixed-line broadband wholesale services for high upload speed plans, 2022–23 to 2024–25

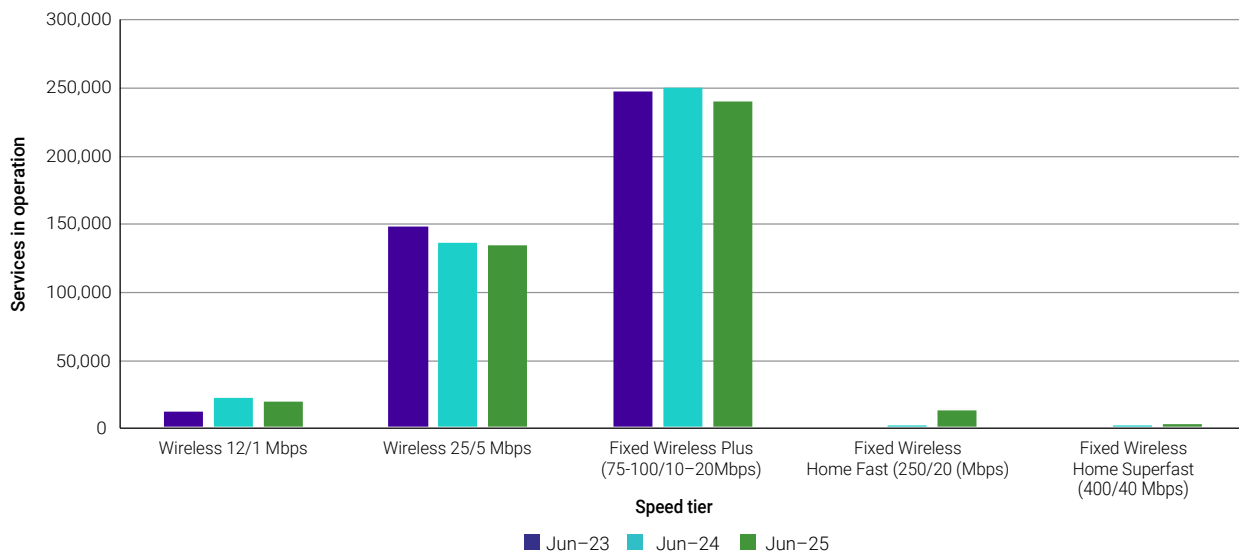


Source: [NBN Wholesale Market Indicators Report – June quarter 2025 report](#).

Figure 4 shows that high-speed fixed wireless plans have also seen some take-up in the 2024–25 financial year, although these plans are not available to all fixed wireless customers. In particular, Telstra and TPG Telecom (which respectively supply around 50% and 11% of retail NBN fixed wireless services) have not yet commenced selling high-speed fixed-wireless plans. Additionally, NBN Co has temporarily reduced the availability of the highest speed tier (Fixed Wireless Superfast).⁶² During a period where NBN Co has been increasing its fixed wireless footprint and upgrading the network, the number of active fixed wireless services has plateaued at approximately 404,000 services from September 2024 to June 2025.

⁶² NBN Co, Operations Bulletin, 24 September 2025, p 1.

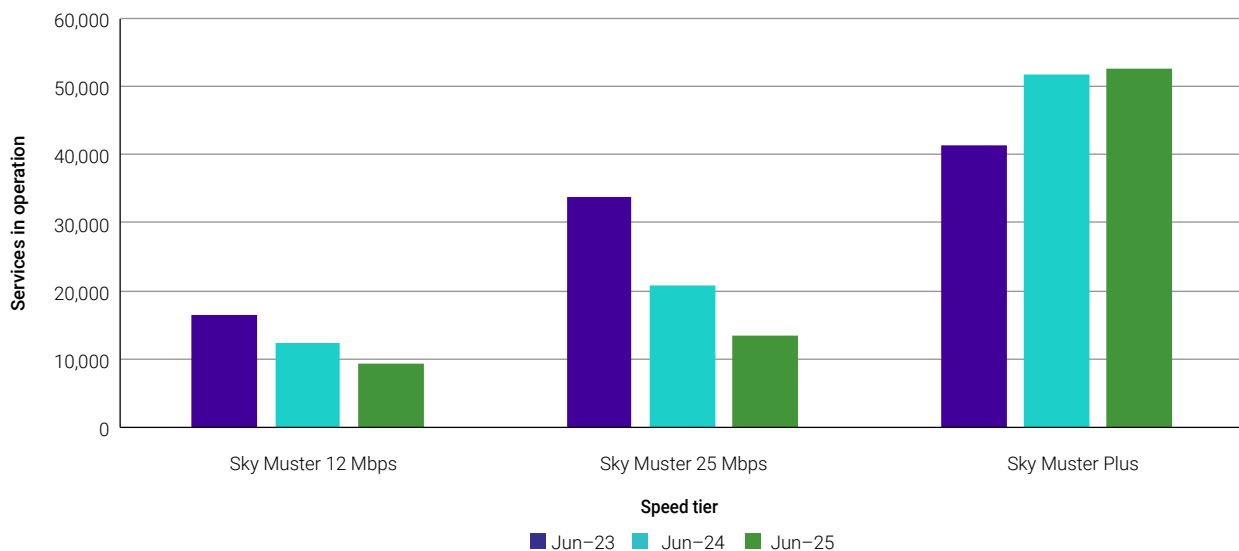
Figure 4: NBN fixed wireless wholesale services by speed tier, 2022–23 to 2024–25



Source: [NBN Wholesale Market Indicators Report – June quarter 2025 report](#).

The total number of NBN Sky Muster satellite services continued to decline, as seen in Figure 5, and only the Sky Muster Plus product saw an increase in services. Based on data from the NBN service quality and network performance record keeping rule, during the 6-month period ending June 2025, 3,029 NBN Sky Muster satellite customers migrated to an NBN fixed wireless service, benefitting from the increased fixed wireless network footprint.⁶³

Figure 5: NBN satellite broadband wholesale services by speed tier, 2022–23 to 2024–25



Source: [NBN Wholesale Market Indicators Report – June quarter 2025 report](#).

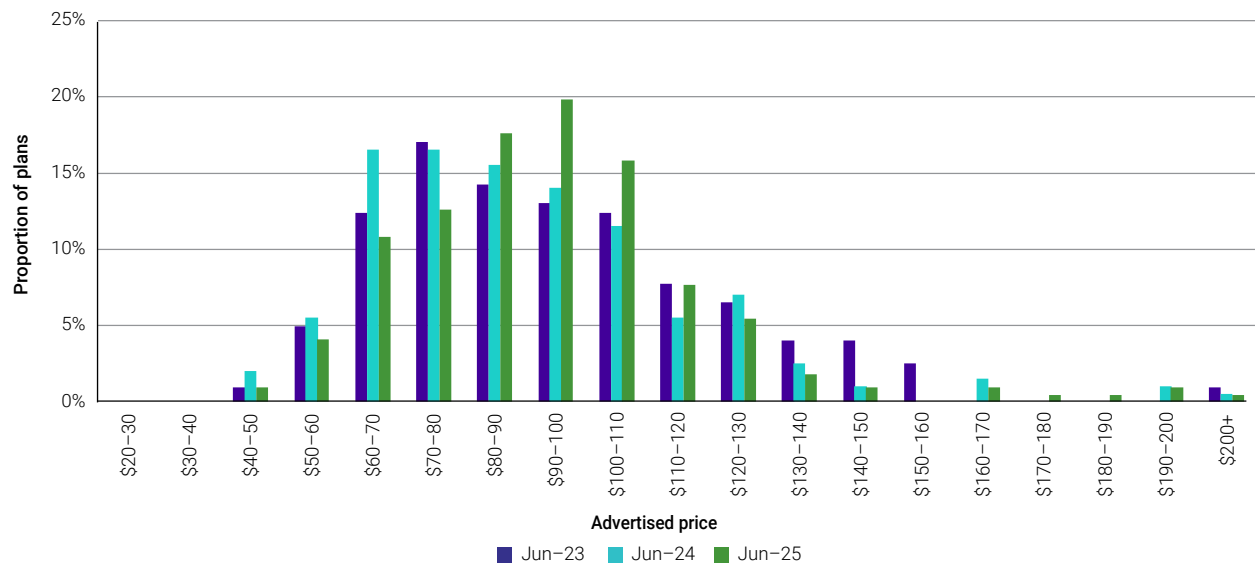
⁶³ ACCC, [Service quality and network performance record keeping rule for superfast broadband networks – June quarter 2025 data](#), 22 August 2025, accessed 1 December 2025.

3.1.2 Pricing

Range of plans available

Fixed broadband retailers offer plans at various price points, and the number and variety of plans available varies between these price points.⁶⁴ Figure 6 shows the proportions of NBN retail fixed broadband plans at various price points over the last 3 years. For example, the \$50–60 per month price point captures retail service plans that are greater than \$50 and less than or equal to \$60 per month.

Figure 6: Percentage of NBN fixed-line broadband plans at various monthly price points, 2022–23 to 2024–25



Note: Prices are in nominal terms.

Source: ACCC estimates based on information from service provider websites.

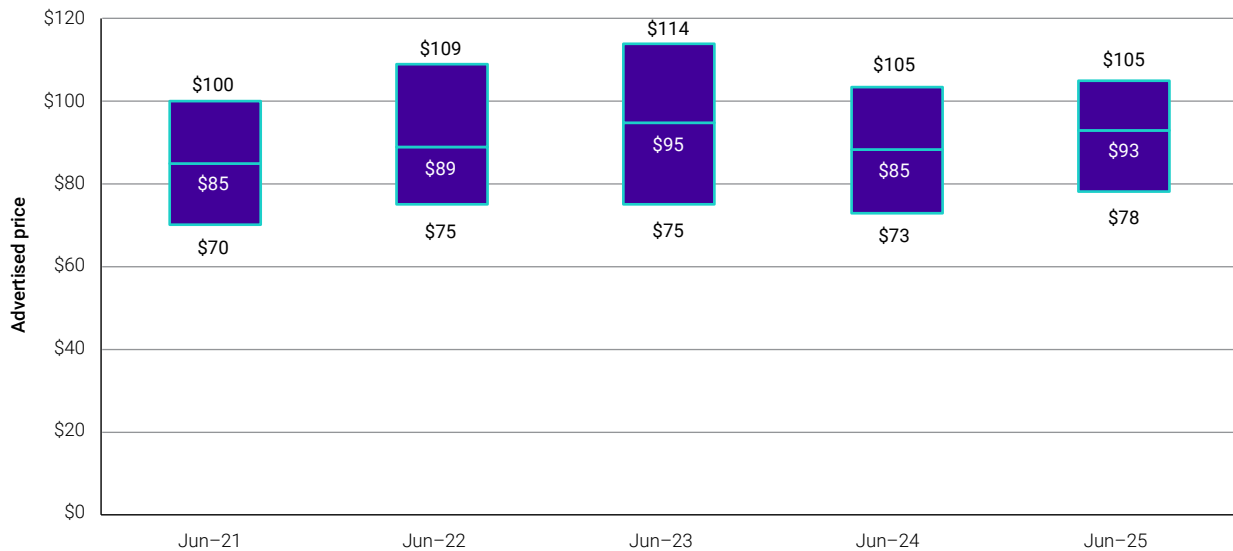
Over recent years, there has been an increase in the number of higher priced plans offered by retailers. As previously noted, changes in recent years to NBN wholesale pricing have brought the higher speed tiers to lower price points, while lower speed tiers had increasing price points. This approach by NBN Co has led to a narrow distribution in the prices of plans, while also shifting the majority of plans towards a higher price point, between \$90–100 per month.

As shown in Figure 7, advertised prices for NBN fixed-line broadband services generally increased in 2024–25 across all plans sampled, with only the upper quartile showing no change. From 2024 to 2025, per month retail prices (exclusive of discounts):

- on low-range plans (25th percentile) increased by 7% (or by \$5) to \$78 per month
- at the mid-range (median) price point increased by 9% (or by \$8) to \$93 per month
- on the higher-range plans (75th percentile) maintained a similar pricing level of \$105 per month.

⁶⁴ Data on retailers' market offers are drawn annually from Critical Information Summaries, which retailers must publish on their website. Prices in the Critical Information Summaries may not reflect prices predominantly advertised on the website of service providers due to temporary discounting.

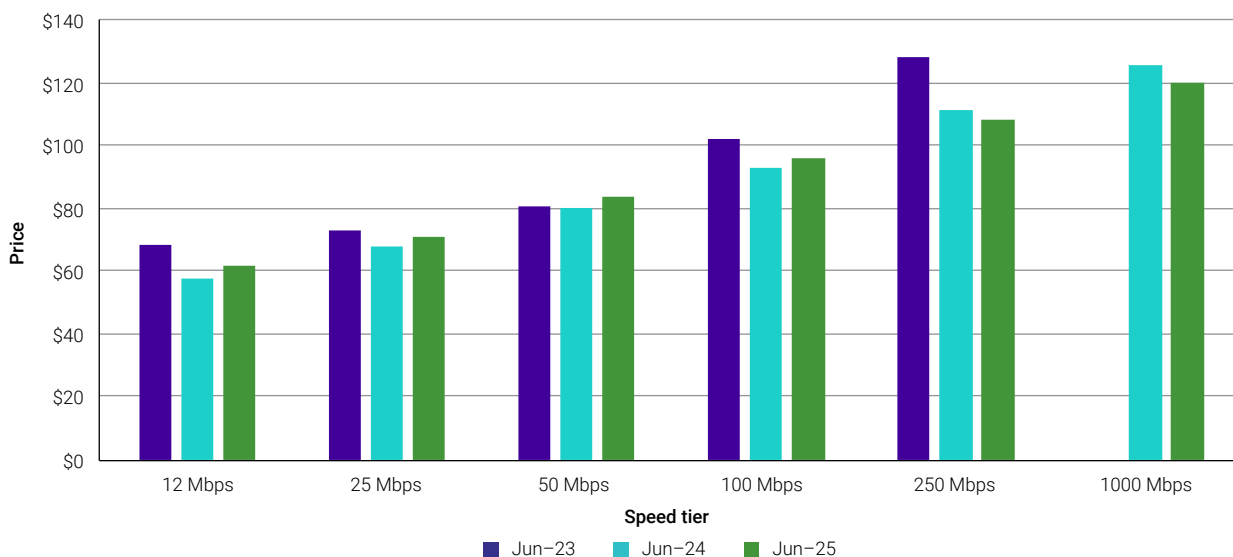
Figure 7: Median monthly advertised price and interquartile range for NBN fixed services, 2020–21 to 2024–25



Note: Prices are in nominal terms, across all plans sampled.
Source: ACCC estimates based on information from service provider websites.

Figure 8 shows that the price increases on the available low-range and mid-range plans were also reflected across the average price of plans sampled by the ACCC, up to 100 Mbps, seeing an increase in average price in 2025. Conversely, 250 Mbps and 1000 Mbps plans saw a small decrease in average price, consistent with a push towards moving consumers to higher speed tiers.

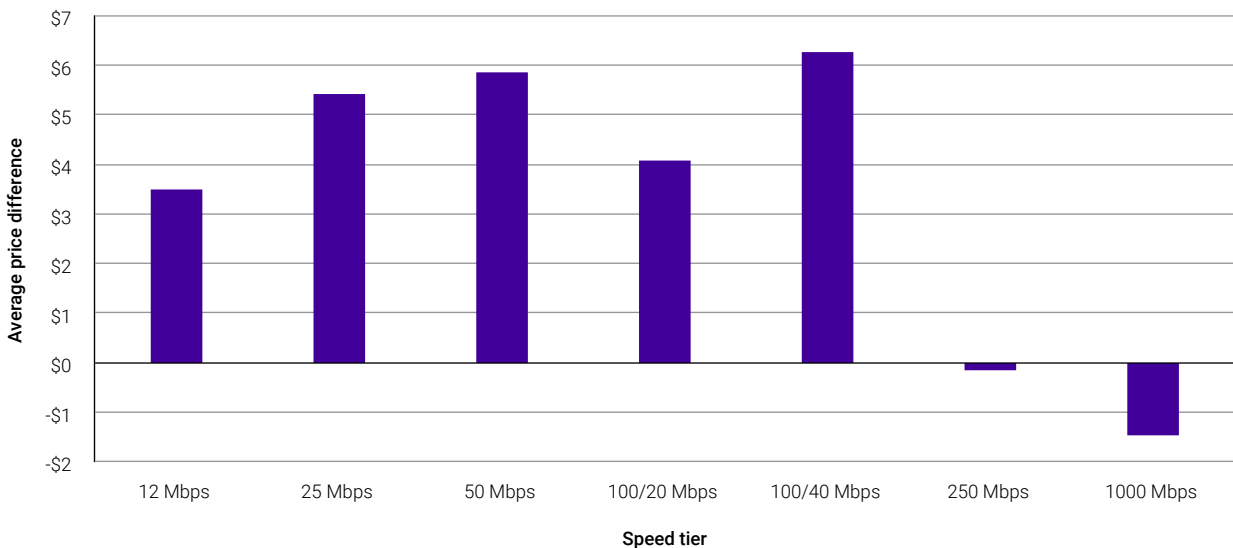
Figure 8: Average NBN fixed-line broadband advertised prices by download speed, 2022–23 to 2024–25



Notes: Prices are in nominal terms. The ACCC began collecting prices for 1000 Mbps services in 2023–24.
Source: ACCC estimates based on information from service provider websites.

As set out in Figure 9, the ACCC examined a narrower, standard set of comparable products between 2024 and 2025, to more accurately compare prices on the same products between years.⁶⁵ In this analysis, prices increased across all of the common speed tiers, and should more closely reflect the changes experienced by most consumers.

Figure 9: Average monthly price changes across simplified NBN fixed-line broadband plans of major retailers, 2023–24 to 2024–25



Note: Only major retailers and a simplified list of comparable plans was used to demonstrate these price changes.
Source: ACCC estimates based on information from service provider websites.

Under this simplified price comparison, the retail price of major retailers’ 1000 Mbps plans had small average price decreases in 2025 (around \$1.45 per month). Conversely, the 100 Mbps or lower plans all incurred increased prices between \$3–7 per month, largely in line with the latest wholesale pricing. Prices for the 250 Mbps plans remained relatively consistent.

Customer weighted prices

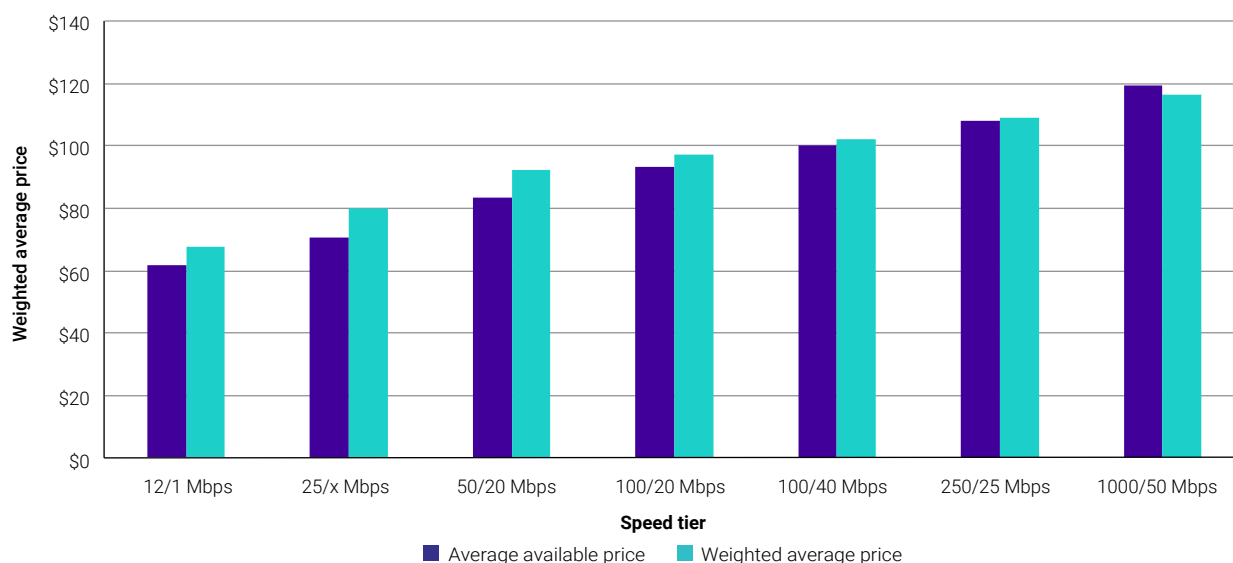
Weighting the available NBN broadband plan prices with the number of NBN customers with major retailers, as per the NBN Wholesale Market Indicators Report figures, provides a closer estimate of what consumers are paying for NBN broadband.

Figure 10 below shows average available (i.e. advertised) prices for NBN fixed-line broadband plans and average prices when weighted according to the number of customers on each major retailers’ plans. For example, a retailer with a large number of customers and a price above the average available price will contribute to a higher weighted average price.

As shown in Figure 10, a continuing trend of weighted average pricing exceeding the average available price was consistent across all the common speed tiers, other than the 1000/50 Mbps speed tier. The difference between weighted average prices and average available prices was largest for the 25 Mbps and 50 Mbps tiers, where consumers were, on average, choosing plans that were \$9.00 and \$8.69 more expensive than the average available plan. With speed tiers of 100 Mbps and greater, the difference in weighted average and average available price reduced with increasing speed, with consumers that choose 1000 Mbps speeds generally opting for plans that are lower cost. This highlights a relationship between consumers seeking higher speeds and being more price sensitive.

65 This subset of plans was based on data from 14 of the 32 NBN service providers surveyed, comprised of the major retailers that cover the majority of the NBN market share.

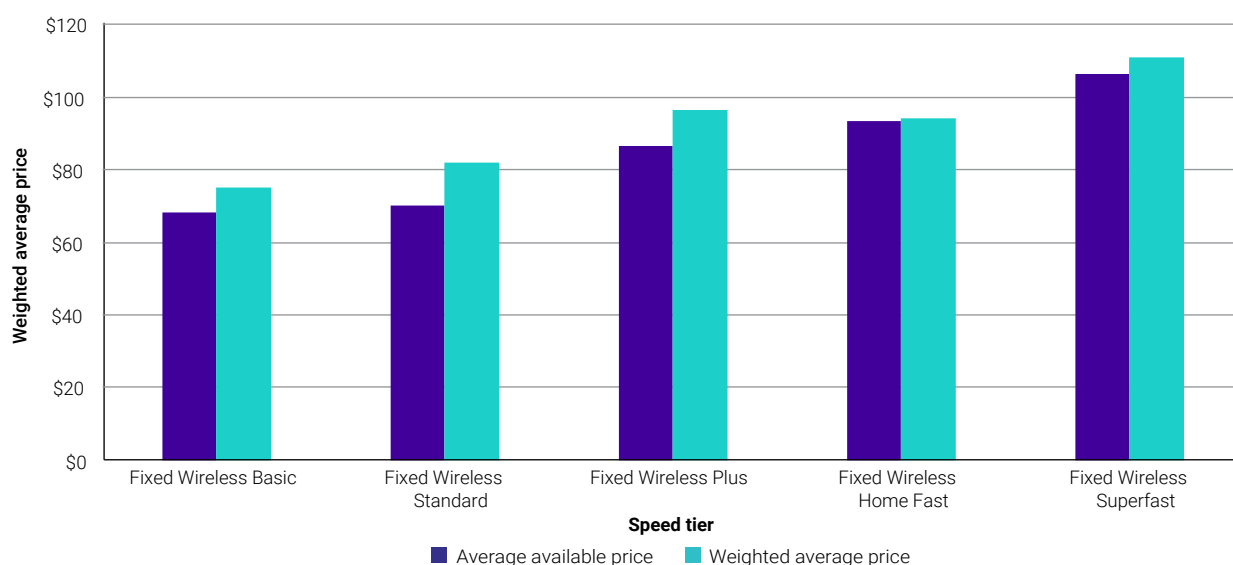
Figure 10: Average monthly price for NBN fixed-line broadband weighted by available plans and number of retailers' customers, 2024–25



Source: NBN Wholesale Market Indicators Reports and ACCC estimates based on information from service provider websites.

As illustrated in Figure 11, customers using fixed wireless services were, on average, paying more than the average available price across all speed tiers when weighted. The customers on Fixed Wireless Home Fast were typically paying prices closest to the average available price, and were typically paying less than users on the slower Fixed Wireless Plus product. This is likely because Telstra, which has the highest NBN fixed wireless market share at approximately 50%,⁶⁶ typically charges higher retail prices than other RSPs and has not yet commenced selling Fixed Wireless Home Fast or Fixed Wireless Superfast, with the majority of its customers on Fixed Wireless Plus.

Figure 11: Average monthly price for NBN fixed wireless broadband weighted by available plans and number of retailers' customers, 2024–25



Source: NBN Wholesale Market Indicators Reports and ACCC estimates based on information from service provider websites.

⁶⁶ ACCC, 'Wholesale Market Indicators Reports', June 2024 and June 2025, accessed 1 December 2025.

3.1.3 Speed tier capability

Figure 12 illustrates how many concurrent full high definition (FHD) and ultra-high definition (UHD) streams a household could reliably stream at once on various NBN speed tiers, during busy hours (7pm to 11pm, Monday to Friday) in May 2025. It illustrates that lower cost 25 Mbps or 50 Mbps speed tiers are likely to be appropriate for many consumers and households, and that it's possible some consumers opting for a 100 Mbps or higher service may be paying more for a speed tier above their needs.

Figure 12: Streaming reliability for various NBN speed tiers during busy hours, May 2025

NBN plan speed	% that can reliably stream FHD & UHD videos from Netflix									
25									4–5	Concurrent FHD video streams
	100.0%	100.0%	98.9%	97.7%	75.0%	0.0%	0.0%	0.0%		
50									0–1	Concurrent UHD video streams
	98.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
100									7+	Concurrent FHD video streams
	100.0%	100.0%	99.7%	99.4%	98.8%	97.0%	92.7%	87.5%		
250									2–3	Concurrent UHD video streams
	99.7%	97.0%	82.6%	0.0%	0.0%	0.0%	0.0%	0.0%		
Fixed Wireless Plus									5–6	Concurrent UHD video streams
	100.0%	99.2%	98.3%	95.6%	91.4%	82.3%	42.1%	0.0%		
Fixed Wireless Plus									7+	Concurrent UHD video streams
	99.4%	98.8%	98.1%	96.9%	95.6%	94.4%	92.5%	91.2%		
Fixed Wireless Plus									2–3	Concurrent UHD video streams
	96.5%	77.6%	61.2%	47.1%	38.8%	27.1%	20.0%	15.3%		

Source: [Measuring Broadband Australia – Report 30](#), as prepared by SamKnows (part of Cisco).

3.2 Retail non-NBN services

3.2.1 Services in operation

Non-NBN fixed broadband services are provided over networks owned by service providers other than NBN Co. Historically, these services have been mostly delivered over Telstra's copper network, the Optus and Telstra hybrid fibre coaxial (HFC) networks, and small fibre networks in apartment complexes, regional cities and new housing estates. Some of these networks have been transferred to NBN Co or other carriers in recent years, while Optus' HFC network has been decommissioned and Telstra's copper network continues to be decommissioned within the NBN fixed-line footprint.

Outside the NBN fixed-line footprint, Telstra is required to maintain its copper network, which is capable of providing access to digital subscriber line (DSL) broadband services.⁶⁷ However, many retail service providers no longer offer new legacy ADSL services, including Telstra, which now only maintains the service for existing ADSL customers. Telstra continues to offer the service wholesale to

⁶⁷ Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts, ['Universal Service Guarantee – fact sheet'](#), 3 September 2021, accessed 1 December 2025.

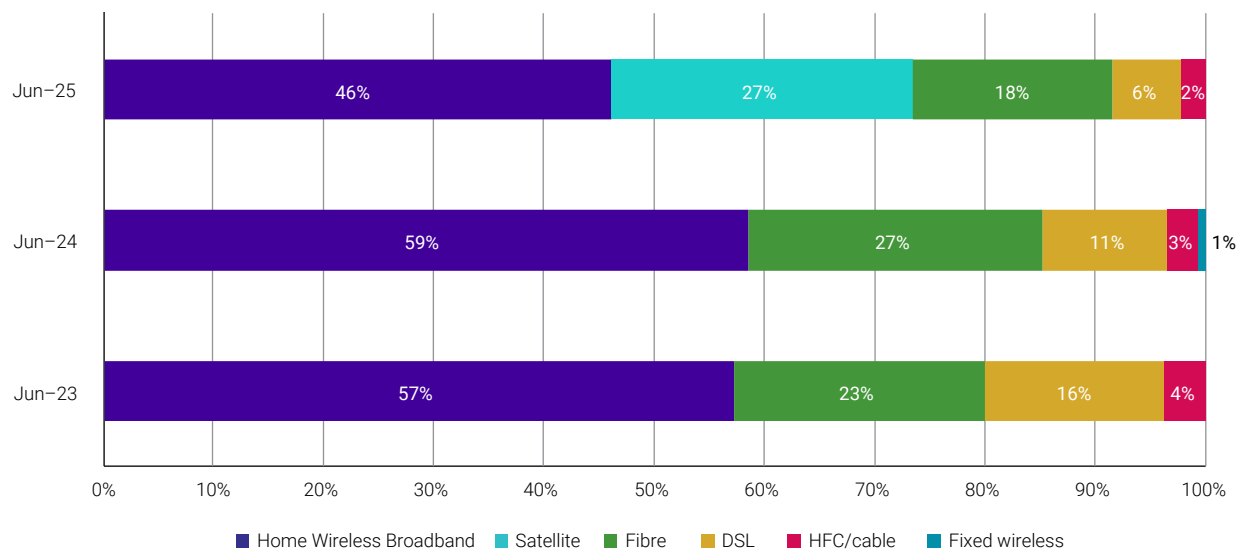
other retailers. Some consumers may also have the choice of receiving fixed wireless (including from regional wireless internet service providers) or satellite broadband services in these areas.

The other major change to the non-NBN market has been the introduction of LEO satellite broadband through Starlink. On 25 September 2024, the ACCC amended the Internet Activity record keeping rules to add Starlink as a record keeper.

Home wireless broadband is different from home Wi-Fi that is connected to a fixed-line broadband service. It uses 4G & 5G mobile networks, is only available in selected (usually metropolitan) areas, and is currently only offered by mobile network operators or mobile virtual network operators.

The number of reported non-NBN broadband services (excluding satellite) has been increasing since 2022, by 6% in 2023, 16% in 2024 and 9% in 2025, driven almost entirely by home wireless broadband services. The ACCC’s Internet Activity Report for June 2025 shows that, as of June 2025, there were around 654,000 home wireless broadband services in operation. This represents an increase of 18% from June 2024 – continuing the significant growth trend from previous years where increases of 18% and 36% were observed in 2023–24 and 2022–23, respectively.

Figure 13: Proportion of retail non-NBN services in operation by access technology, 2022–23 to 2024–25



Notes: The market shares above cover most, but not all, of the retail market for non-NBN broadband services. Excludes non-NBN fixed satellite access technologies for the June 2023 and June 2024 reference periods.

Source: ACCC Internet Activity Reports. Starlink was added as a record keeper in September 2024.

From December 2024, Starlink has also been required to report to the ACCC on the number of its satellite services in operation. In June 2025, Starlink reported 375,000 retail services, which was significant growth over its publicly reported number of 250,000 in July 2024. This now represents 27% of the total non-NBN retail services reported to the ACCC.

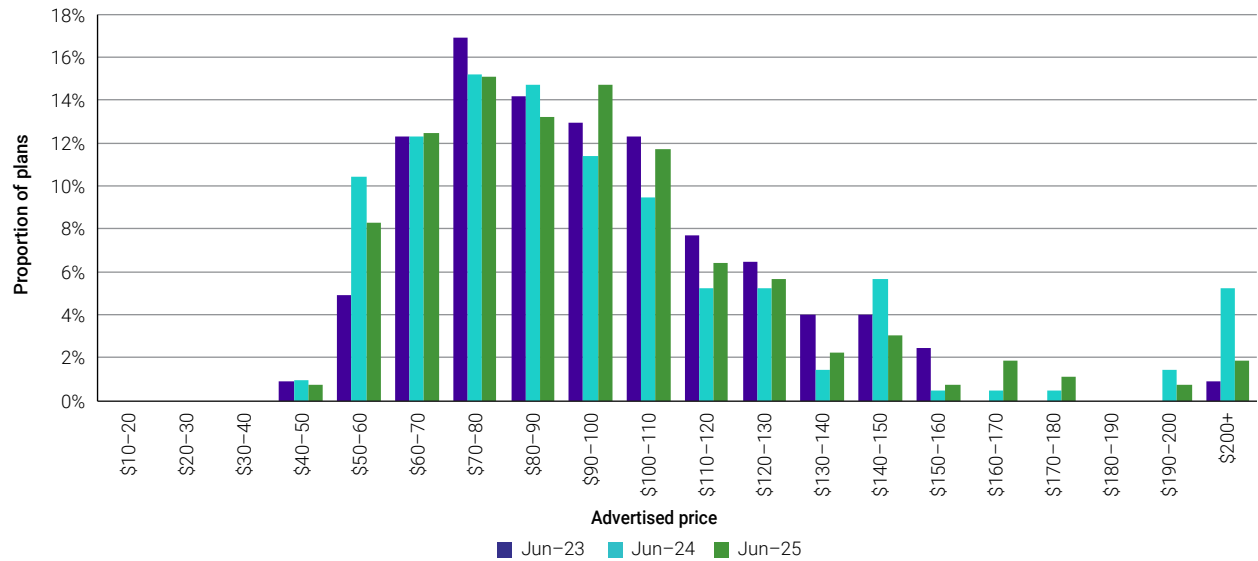
Non-NBN Fibre and HFC services remained at similar levels to 2024, totalling 256,000 and 28,000, respectively. The number of DSL services continued to decrease, down to 89,000 services. This is a smaller decrease from previous years in both relative and total services terms, with a 20% reduction in services in 2023–24, compared to 17% for 2024–25.

3.2.2 Pricing

Range of plans available

Figure 14 shows that in 2025, the greatest proportion of non-NBN fixed broadband plans were in the \$50–\$110 per month price range, accounting for more than 75% of all plans on offer. Overall, the distribution of non-NBN broadband prices does seem to have shifted to higher price points, with a notable rise in \$90–\$110 per month plans.

Figure 14: Percentage of non-NBN fixed broadband plans at various monthly price points, 2022–23 to 2024–25

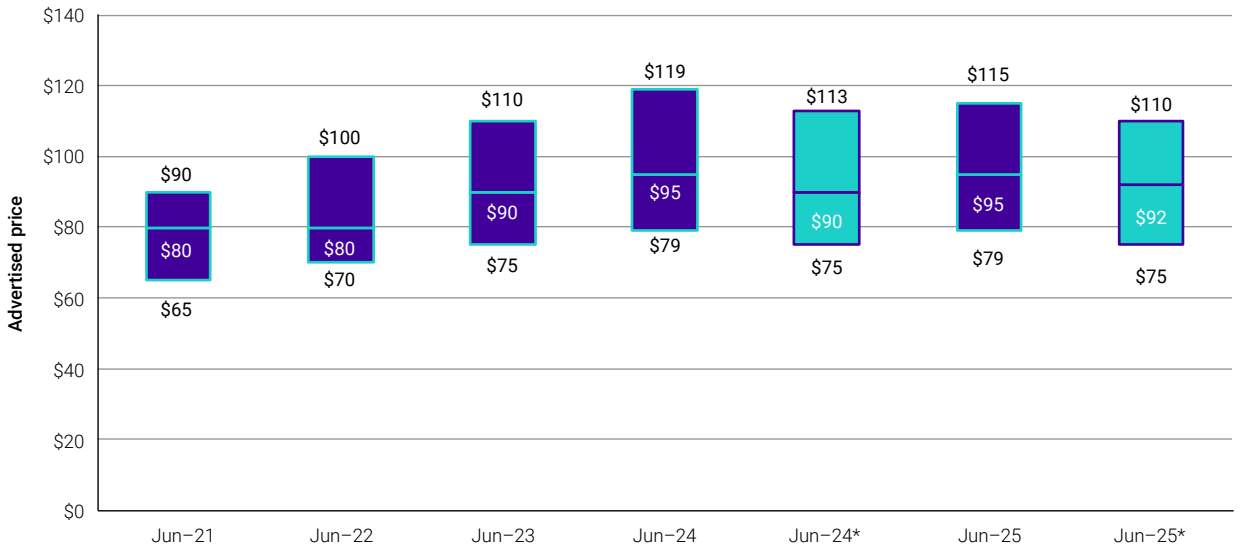


Note: Prices are in nominal terms.

Source: ACCC estimates based on information from service provider websites.

In 2024–25, the advertised prices for non-NBN fixed broadband services stayed relatively consistent, with some decrease in the price of high-range plans, as shown in Figure 15. The lower quartile of prices and median remained at 2024 levels while the upper quartile prices decreased due to lower availability of plans in the \$200+ per month range.

Figure 15: Median monthly advertised price and interquartile range for non-NBN fixed services, 2020–21 to 2024–25



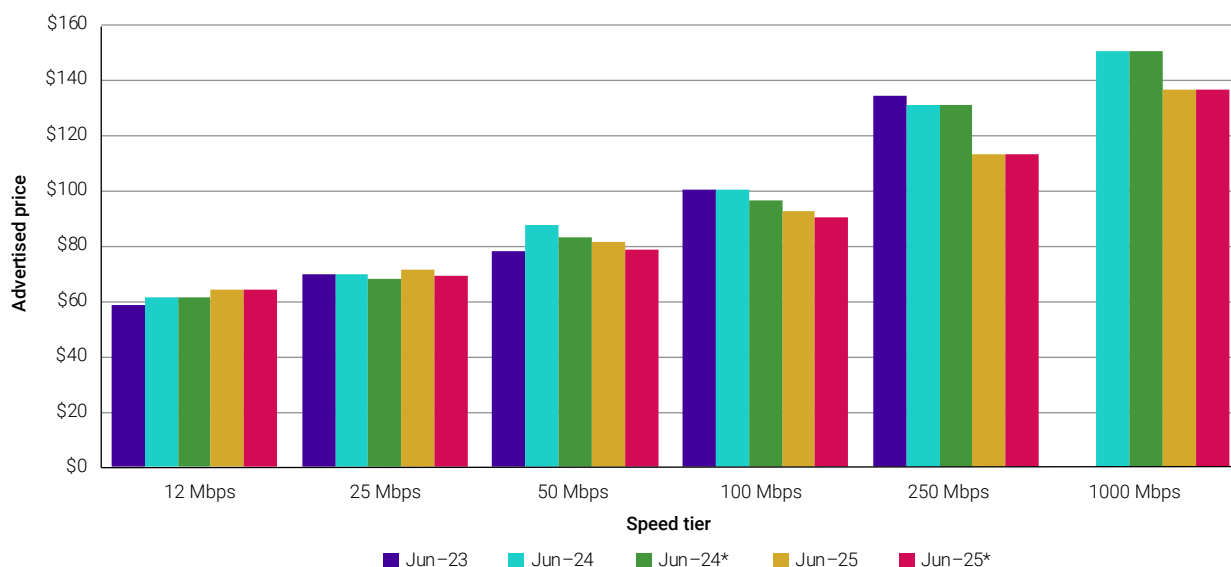
Notes: Prices are in nominal terms across all plans sampled. *Home Wireless Broadband included.
Source: ACCC estimates based on information from service provider websites.

Including home wireless broadband plans in the pricing analysis reduces the price of each quartile of available plans, bringing them closer to the available plan prices for NBN services. This highlights the price competitiveness of home wireless broadband that is likely driving consumers who can access these services towards this product type.

The proportion of retail plans on offer with download speeds of 50 Mbps or less continued to decline down to approximately 28% of plans, while a greater number of higher speed plans became available.

Non-NBN pricing at the 12 Mbps and 25 Mbps speed tiers saw a small increase for the 2024–25 financial year, while plans at higher speed tiers saw significant price reductions, as illustrated in Figure 16. This did bring the high-speed non-NBN plans into closer alignment with high-speed NBN plans. Without an understanding of the switching behaviour of consumers and available networks, it is difficult to definitively determine what has driven this change. It is possible that non-NBN networks are facing some competitive constraint on pricing by the home wireless broadband products or even the comparable NBN plans, despite them not competing for the same internet users.

Figure 16: Changes in average non-NBN fixed broadband monthly advertised prices by plan download speed, 2022–23 to 2024–25



Note: Prices are in nominal terms. Plans with different speed tiers are excluded. *Home Wireless Broadband included.

Source: ACCC estimates based on information from service provider websites.

Some technologies, such as home wireless broadband and LEO satellite, are increasingly offering uncapped speed plans, which are not presented in Figure 16. The price, speed and data allowance of home wireless broadband plans are comparable to fixed broadband plans such as those supplied over the NBN. As such, home wireless broadband services are becoming increasingly attractive to consumers in some areas as an alternative to fixed-line services.

The current key home wireless broadband monthly price and speed offerings (excluding discounts) are shown in Table 1. Prices for home wireless broadband have stayed relatively consistent, in contrast to other products that use the mobile network (see Sections 3.4 and 3.5). This may occur due to the increased competition home wireless broadband faces from other broadband networks, including the NBN.

Table 1: Advertised monthly prices and typical speeds for 5G home wireless broadband, flagship mobile network operator brands, 2024 to 2025

Retailer	2024 monthly price	2025 monthly price	2024 typical evening download speed	2025 typical evening download speed
Telstra	\$85	\$85	30–633 Mbps ⁶⁸	30–570 Mbps ⁶⁹
Optus	\$69	\$69	45 Mbps	45 Mbps
Optus	\$79	\$79	87 Mbps	87 Mbps
Optus	\$99	\$99	210 Mbps	210 Mbps
Vodafone	\$60	\$60	20 Mbps	20 Mbps
Vodafone	\$65	\$65	50 Mbps	50 Mbps
Vodafone	\$70	\$75	100 Mbps	100 Mbps

Source: Retailers' websites as at 2 June 2024 and 2025.

⁶⁸ Average busy period (7–11pm) download speed was 317 Mbps as at 11 October 2024.

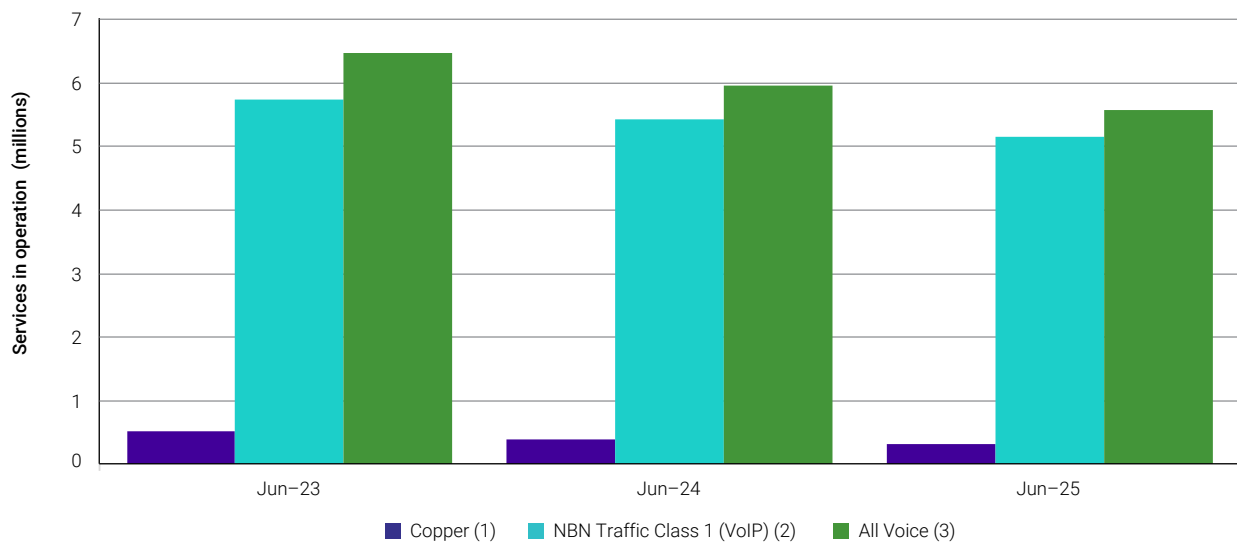
⁶⁹ Average busy period (7–11pm) download speed was 300 Mbps.

3.3 Fixed voice services

3.3.1 Services in operation

The number of fixed voice services in operation reported to the ACCC, including both legacy copper and VoIP-based services (such as NBN), continued to decline in 2025. As shown in Figure 17, the number of fixed voice services reduced from 6.5 million in June 2023 to just below 5.6 million in June 2025.

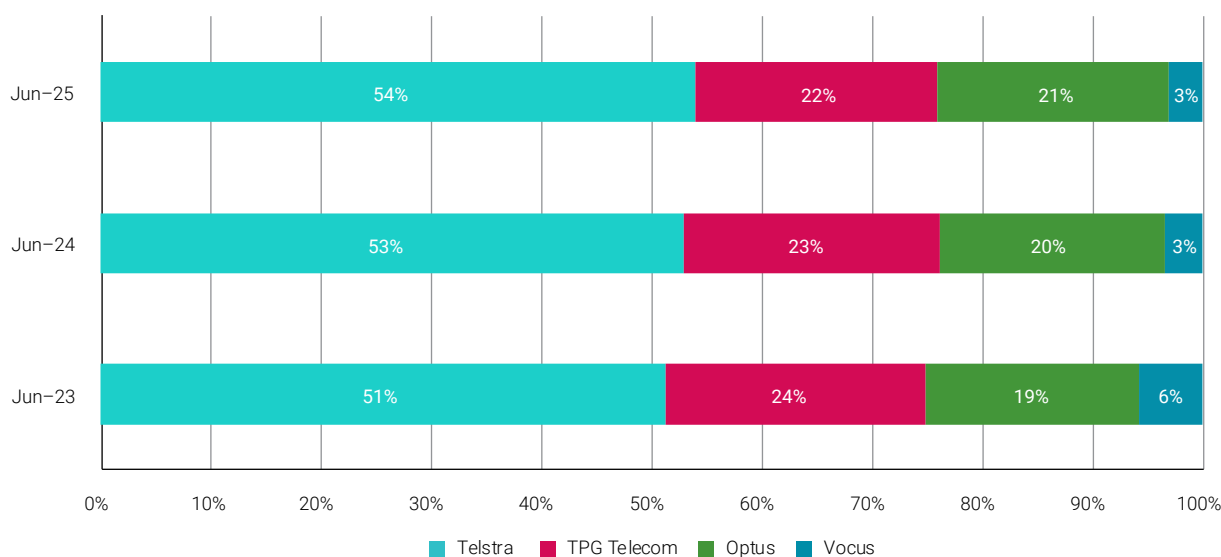
Figure 17: Fixed voice services in operation, 2022–23 to 2024–25



Source: (1) Quarterly snapshots of Telstra's customer access network, (2) NBN Wholesale Market Indicators Reports and (3) ACCC Division 12 record keeping rule.

Figure 18 shows that the market shares of fixed voice services in operation have fluctuated over the last 3 years, although Telstra has consistently retained the highest market share of fixed voice services.

Figure 18: Retail market share for fixed voice services, 2022–23 to 2024–25



Source: ACCC [Division 12 record keeping rule](#).

Range of legacy voice only plans available

Only a few standalone voice plans were available in June 2025 for fixed voice services over the legacy copper network. These were usually offered in regional and rural areas outside the NBN fixed-line footprint. Plans with no usage charges for local, national and mobile calls typically ranged from \$50–60 per month, while plans with some usage charges cost in the range of \$25–40 per month.⁷⁰

3.4 Retail mobile phone services

Telstra, Optus and TPG Telecom continue to dominate the retail market for mobile services. The 3 national mobile network operators operate large vertically integrated telecommunications businesses, offering a range of pre-paid and post-paid retail products. These services include:

- mobile phone plans (consisting of voice, messaging and data services)
- standalone mobile broadband services
- home wireless services (4G and 5G) capable of delivering broadband to fixed addresses at home and small business premises.

In addition to the national mobile network operators, there are also mobile virtual network operators that acquire wholesale mobile services to provide retail services to consumers. Other than the mobile network operators' flagship retail brands (Telstra, Optus and TPG Telecom's Vodafone), they also operate sub-brands that compete more directly with the mobile virtual network operators for the more price-sensitive segment of the retail market. These mobile network operator sub-brands include Belong, Felix and Amaysim.

Mobile phone services remain the most common form of access to both the internet and voice services in Australia. As at 30 June 2025, there were 30.4 million mobile phone services in operation, compared to the Australian population of 27.5 million.⁷¹ Approximately 60% or 18.1 million of the

⁷⁰ ACCC estimates based on information from service provider websites.

⁷¹ ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025; Australian Bureau of Statistics, '[National, state and territory population, March 2025](#)', 18 September 2025, accessed 1 December 2025.

services were post-paid services, with pre-paid services accounting for the remainder. Between 30 June 2024 and 30 June 2025, the total number of post-paid mobile phone services in operation has reduced marginally by 1.0%. However, the total number of pre-paid mobile phone services has grown by 3.6% over the same period.⁷² We have previously heard that pre-paid plans are considered more affordable in the short-term if a consumer has a low or unreliable income, so this trend continues to reflect the likely increasing financial pressures for some consumers.⁷³

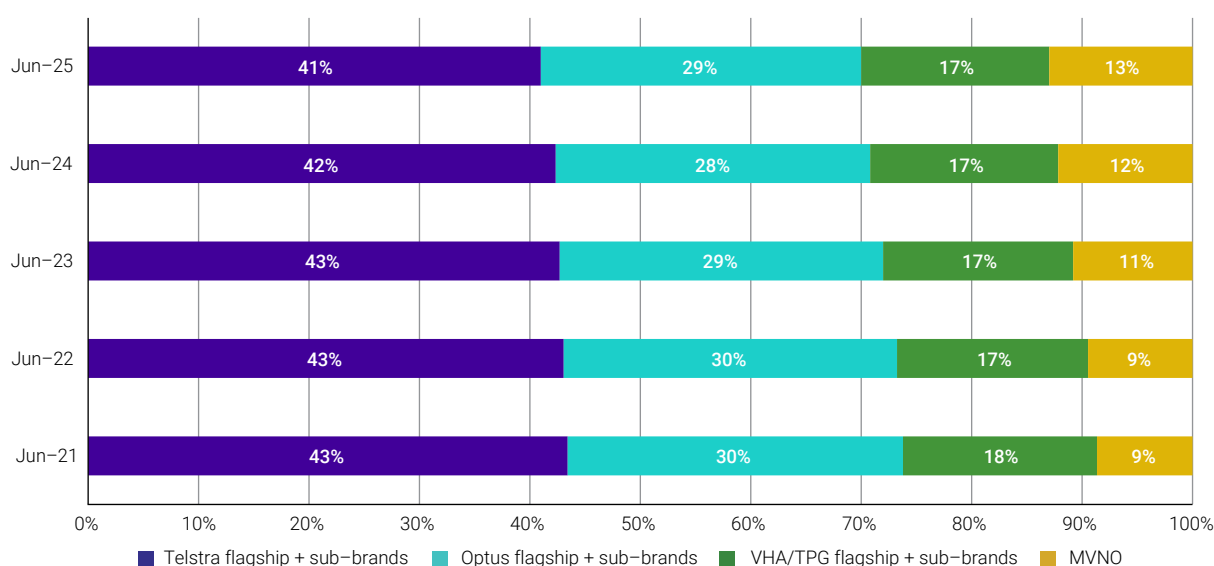
The functional distinction between post-paid and pre-paid mobile phone services has diminished in recent years, with pricing and data inclusions on pre-paid plans gradually converging to those on post-paid plans. Additionally, some retailers provide both a pre-paid and post-paid option on the same plan.

3.4.1 Services in operation

Figure 19 shows that retail market shares for mobile phone services have remained steady over at least the last 4 years, heavily concentrated in retail brands operated by the mobile network operators including related sub-brands.

As at 30 June 2025, the 3 mobile network operators' collective market share (inclusive of sub-brands) was significant at 87%. Telstra continued to lead with 41%, followed by Optus (29%) and TPG Telecom (17%). The remaining 13% market share belongs to mobile virtual network operators. The collective market share of mobile virtual network operators has grown in the last 4 years, up from 9% in 2020–21.

Figure 19: Retail market share for mobile phone services – mobile network operators vs mobile virtual network operators, 2020–21 to 2024–25



Source: [ACCC Internet Activity Reports](#).

⁷² ACCC, 'Internet Activity Record Keeping Rule – June 2025 Report', December 2025.

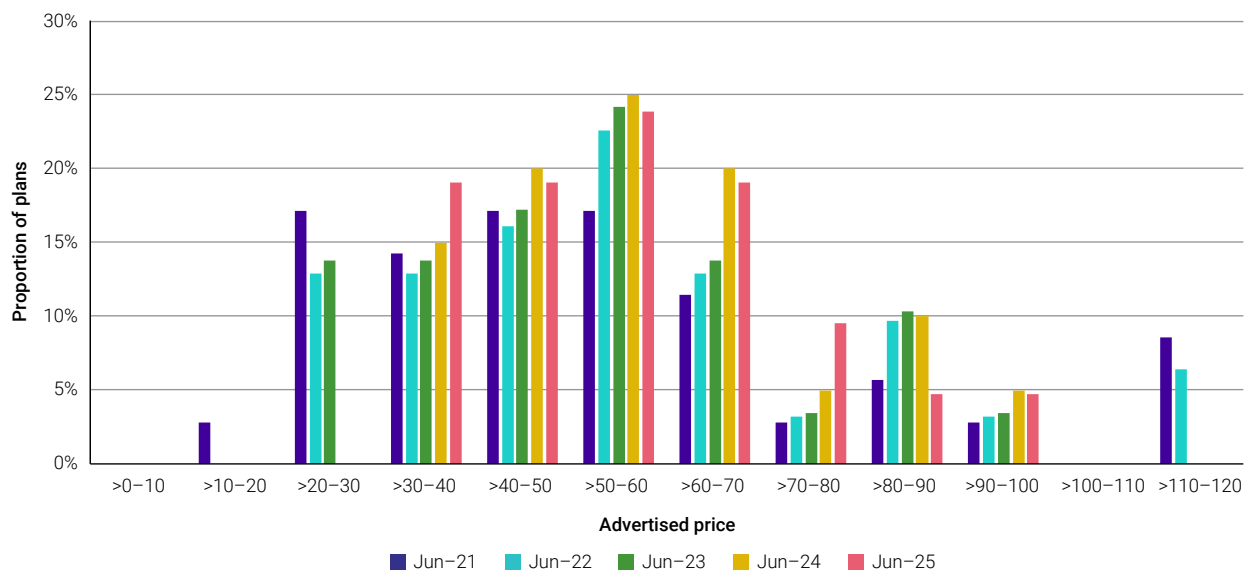
⁷³ ACCC, 'Regional Mobile Infrastructure Inquiry final report', July 2023, p 15, accessed 1 December 2025.

3.4.2 Range of plans available

Figure 20 illustrates the range of plans available for the mobile network operators' flagship brands from 2020–21 to 2024–25.

In 2024–25, the most popular price point for these plans was \$50–\$60 per month, unchanged from previous years. The number of plans included within the sample increased by one in 2024–25. However, the overall number of plans available has reduced from 35 in 2020–21 to 21 plans in 2024–25, suggesting the mobile network operators are moving towards a consolidated number of service offerings, often by removing lower priced plans.

Figure 20: Percentage of mobile network operator flagship mobile phone plans at various monthly price points, 2020–21 to 2024–25



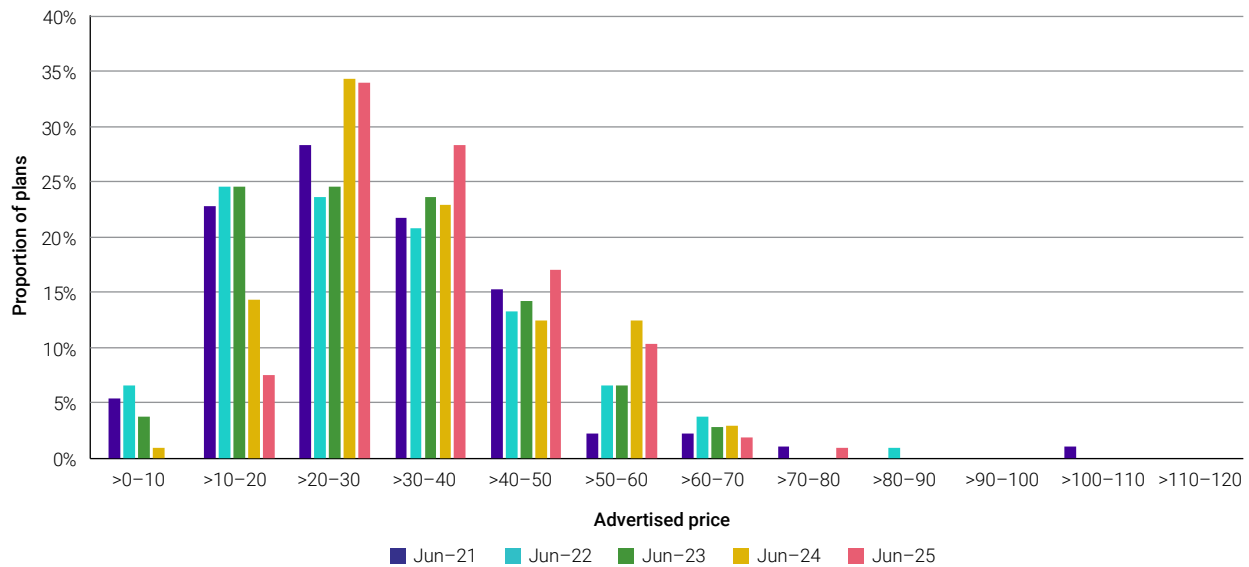
Source: ACCC estimates based on information from service provider websites.

Conversely, for non-mobile network operator flagship plans the most popular price point was \$20–\$30 per month, as shown in Figure 21.⁷⁴ In part, this appears to be driven by a reduction in plans between \$0–\$20 per month and suggests a genuine price increase.

The spread of price points for non-mobile network operator flagship plans has increased for 2024–25, with a notable increase in \$30–\$40 per month and \$40–\$50 per month plans compared to previous years – suggesting a gradual upward shift in plan choices. However, the most popular price point in 2024–25 (\$20–\$30 per month) is still well below that of the mobile network operator flagship plans (\$50–\$60 per month).

⁷⁴ Non-mobile network operator means sub-brands and mobile virtual network operators.

Figure 21: Percentage of non-mobile network operator flagship mobile phone plans at various monthly price points, 2020–21 to 2024–25



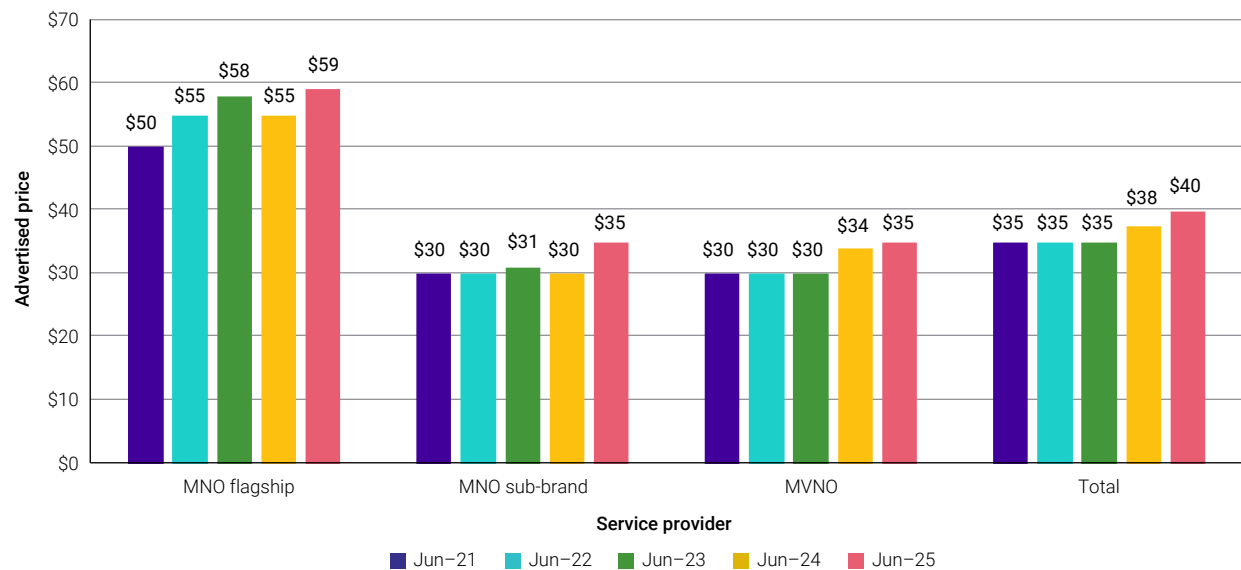
Note: Non-mobile network operator flagship refers to mobile network operator sub-brands and mobile virtual network operators.

Source: ACCC estimates based on information from service provider websites.

3.4.3 Price changes

Figure 22 highlights the divergence in the median advertised prices for the mobile network operators' flagship brands compared to prices for the mobile network operators' sub-brands and the mobile virtual network operators' products. Figure 22 draws on data for both pre-paid and post-paid plans.

Figure 22: Median advertised monthly price for mobile network operator flagship, sub-brand and mobile virtual network operator mobile phone plans, 2020–21 to 2024–25



Source: ACCC estimates based on information from service provider websites.

Figure 22 shows that, overall, the median advertised price for mobile phone services across all sampled providers has increased by 6.4% (or \$2.40 per month) since 2023–24.

The median advertised price for the mobile network operators’ flagship brands has increased by 7.3% from \$55 per month in 2023–24 to \$59 per month in 2024–25, returning to the increasing trend observed from 2020–21 to 2022–23.

The median advertised price for mobile network operator sub-brands increased by 16.7% between 2023–24 and 2024–25, from \$30 to \$35 per month. This is a significant increase compared to previous years where median prices had remained largely flat.

The median monthly advertised price for mobile virtual network operators’ plans increased by 2.9% (or \$1) between 2023–24 and 2024–25.

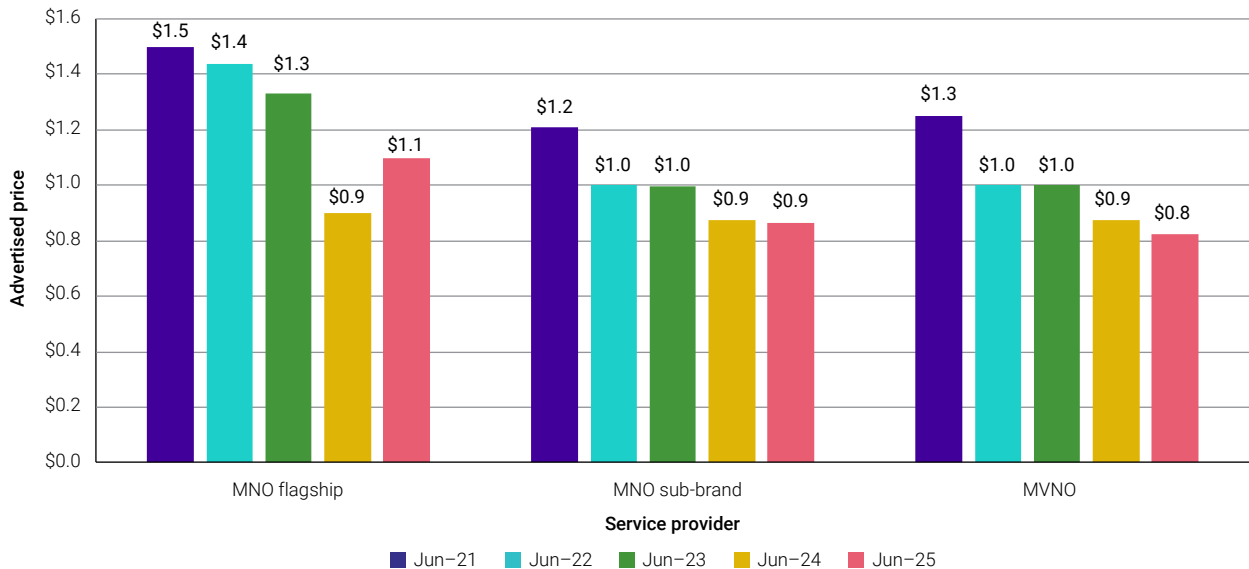
Overall, the median monthly advertised prices for the mobile network operators’ flagship brands have been significantly higher than the median advertised prices of their sub-brands and the mobile virtual network operators’ plans for at least the last 5 years.

3.4.4 Data allowances

The price increases observed in mobile plans over recent years are often, though not always, accompanied by significant increases in data allowances. While this suggests the higher price of such plans might be offset by greater quantities of included data, many consumers may not value having a greater data allowance.

Figure 23 shows the median monthly advertised cost per gigabyte of data across different groups of service providers. Between 2023–24 and 2024–25, the median advertised cost per gigabyte of data remained unchanged for the mobile network operators’ sub-brands and decreased slightly for mobile virtual network operators plans. Meanwhile, for mobile network operators’ flagship plans, the advertised cost per gigabyte rose from \$0.90 to \$1.10 per month during the same period, reversing the downward trend observed in previous years. This is driven by increases in the prices of some the mobile network operators’ flagship mobile plans that were not accompanied with higher data allowances, as noted in Chapter 2.

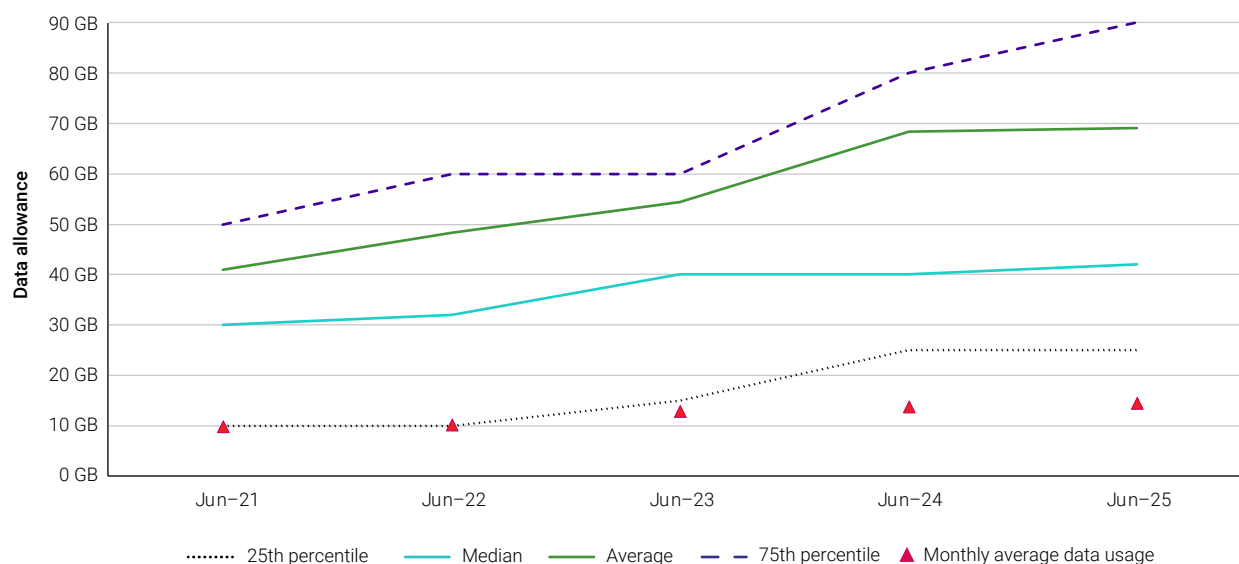
Figure 23: Median monthly advertised cost per gigabyte of data for mobile phone plans, 2020–21 to 2024–25



Source: ACCC estimates based on information from service provider websites.

Consistent with the trends observed in previous reports, average monthly data usage for mobile phone plans has been consistently well below the median and average advertised data allowances from 2020–21 to 2024–25. Figure 24 shows that the median advertised data allowance across all service providers in 2024–25 was 42 GB per month, up from 30 GB per month in 2020–21, representing a 40% increase.

Figure 24: Average, median, 25th percentile and 75th percentile monthly data allowance for mobile phone services, 2020–21 to 2024–25



Source: ACCC estimates based on information from service provider websites and [ACCC Internet Activity Reports](#).

In 2024–25, the ACCC estimates that the average advertised data allowance for plans (pre-paid and post-paid) across all service providers was 69GB per month. However, the monthly average data usage reported to the ACCC was only 14.5GB per user, up from 9.8 GB in 2020–21. This suggests that, on average, despite increased usage in recent years consumers do not use the higher data allowances that have been offered over time and may instead prefer lower data allowances for a lower price.

3.5 Retail mobile broadband services

Mobile broadband is an internet connection that provides a short range, high data rate connection between a mobile data device and access points connected to a network. Examples include 4G/5G accessed through a laptop, USB/Wi-Fi modem or tablet.

3.5.1 Services in operation

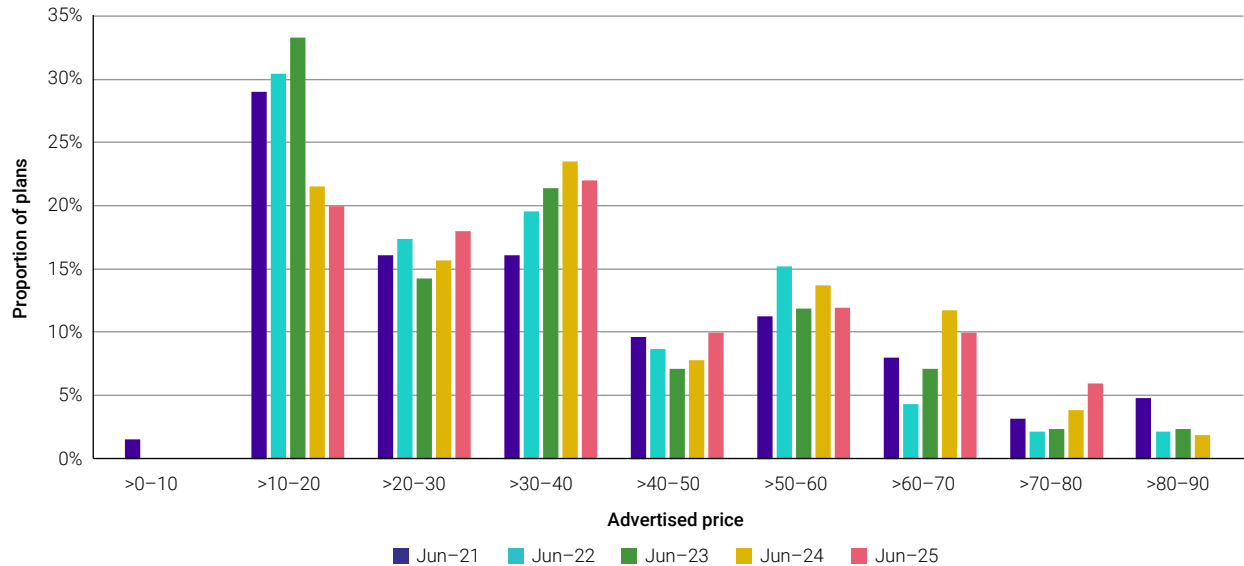
As at 30 June 2025, there were approximately 4.0 million mobile broadband services in operation.⁷⁵ Retail market shares for mobile broadband services have remained steady over at least the last 5 years, almost exclusively concentrated in retail brands operated by the mobile network operators.

⁷⁵ ACCC, '[Internet Activity Record Keeping Rule – June 2025 Report](#)', December 2025.

3.5.2 Range of plans available

Figure 25 shows that in 2024–25 the most popular price point for mobile broadband plans remained at \$30–40 per month. Prior to the decrease in 2024–25, this advertised price category was the only category to experience an increasing proportion of plans every year since 2020–21. Since 2022–23, there has been a reduction in the proportion of plans in the cheapest and most expensive categories (\$10–\$20 per month and \$80–\$90 per month).

Figure 25: Percentage of mobile broadband plans at various monthly price points, 2020–21 to 2024–25



Source: ACCC estimates based on information from service provider websites.

3.5.3 Price changes

Since 2020–21, the median advertised price for mobile broadband plans has varied from between around \$35 per month to around \$40 per month. As shown in Figure 26, the median price returned to \$35 per month in 2024–25, while the interquartile range reduced to \$30 per month.

Figure 26: Median monthly advertised price and interquartile range for mobile broadband services, 2020–21 to 2024–25



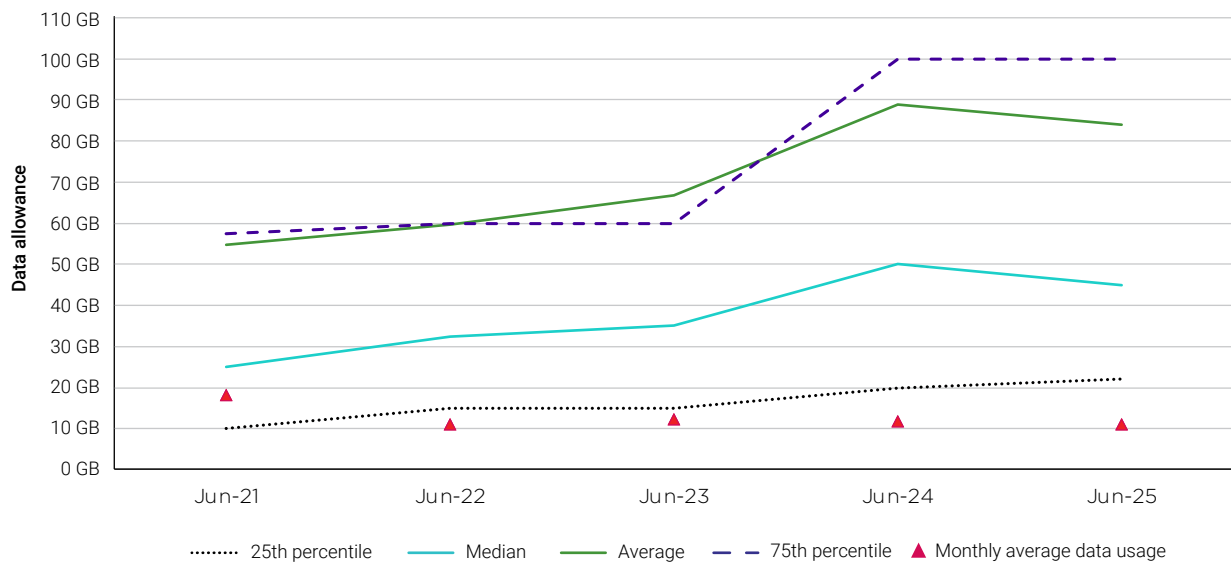
Source: ACCC estimates based on information from service provider websites.

3.5.4 Data allowances

The median advertised data allowance for mobile broadband plans in 2024–25 was 45 GB per month, up from 25 GB per month in 2020–21. This represents an 80% increase from 2020–21 overall, but a 10% reduction since 2023–24. Over the same period, the monthly average reported data usage has decreased by 39% to 11.1 GB per month (down from 18.3 GB per month in 2020–21), as shown in Figure 27.

This decline in average usage in recent years suggests that, on average, consumers do not use the higher data allowances that have been offered over time and may instead prefer lower data allowances on a lower-priced plan.

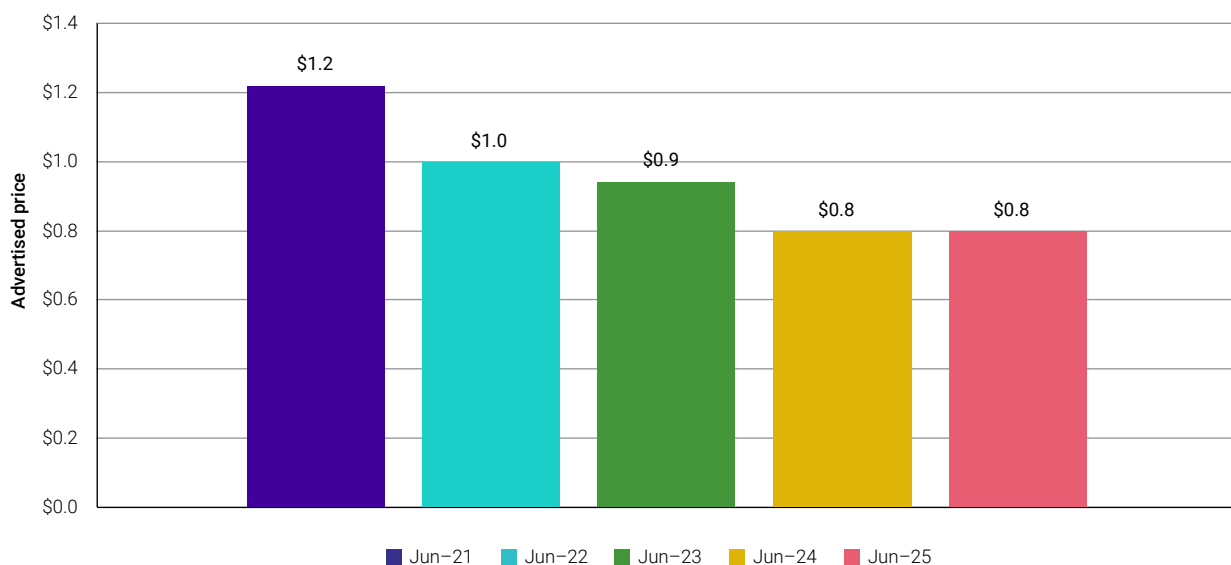
Figure 27: Average, median, 25th percentile and 75th percentile monthly data allowance for mobile broadband services, 2020–21 to 2024–25



Source: ACCC estimates based on information from service provider websites and [ACCC Internet Activity Reports](#).

Figure 28 shows that the advertised price per gigabyte for mobile broadband plans has been declining gradually over the last 5 years, from \$1.20 per month in 2020–21 to \$0.80 per month in 2024–25. The trend seems have stabilised from last year, staying at the same price point since 2023–24.

Figure 28: Median monthly advertised cost per gigabyte of data for mobile broadband plans, 2020–21 to 2024–25



4. ACCC Activities

4.1 Regulated access to telecommunications

4.1.1 NBN Co Special Access Undertaking

NBN Co continued to implement the commitments that it provided in its August 2023 variation to the SAU, with the first accounting separation report provided under the SAU. This completes the new reporting that was agreed to in the variation, complementing the varied SAU's expenditure and price control compliance reporting.

In August 2025, the ACCC commenced consultation on NBN Co's proposed replacement module for the next regulatory cycle under NBN Co's SAU.⁷⁶ The ACCC intends to make a draft determination regarding the proposed replacement module in March 2026 and a final determination in June 2026.

Regulatory cycles allow for the access terms and conditions which apply to NBN Co in each regulatory cycle to be periodically updated through a replacement module process. Replacement modules ensure regulatory settings remain effective in promoting the long-term interests of end-users throughout each regulatory cycle.

The ACCC's replacement module determination will establish important regulatory settings for the upcoming regulatory cycle, including:

- regulatory cycle length – under the SAU, regulatory cycles must be either 3, 4 or 5 years in duration
- benchmark service standards and rebates
- input values for NBN Co's financial building block model, including values for expenditures, depreciation expenses, the regulated asset base and the weighted average cost of capital
- the speed tiers to which entry level price controls will apply
- any re-categorisation of products and services from core to competitive.

SAU replacement module application

In July 2024, the ACCC issued NBN Co a notice requiring it to submit its replacement module application for the next regulatory cycle by 2 July 2025.⁷⁷ The ACCC also requested NBN Co provide information and documents in support of its application.⁷⁸ This is the first time the ACCC has initiated the replacement module process, as previous regulatory settings were fixed under the SAU.

The 2023 variation to the SAU introduced a requirement for NBN Co to consult with access seekers and consumer advocacy groups before lodging a replacement module application.⁷⁹ Between

76 ACCC, '[Consultation on replacement module and weighted average cost of capital methodology](#)', 22 August 2025, accessed 1 December 2025.

77 ACCC, '[NBN Co Special Access Undertaking 2013 - Notice under subclauses 5.2\(b\) & \(c\)](#)', 1 July 2024, accessed 1 December 2025.

78 ACCC, '[Letter to NBN Co - Notice of due date and information request](#)', 1 July 2024, accessed 1 December 2025. The information request covered topics including products and pricing, revenue, expenditure, service standards and governance.

79 NBN Co, '[NBN Co Special Access Undertaking](#)', 13 December 2013, clause 5.7(a), p 8, accessed 1 December 2025.

October 2024 and April 2025, NBN Co sought input from consumer advocates, RSPs and customers on topics including service standards, its entry level offers, and proposed expenditure.⁸⁰

NBN Co submitted its replacement module application and supporting information and documents to the ACCC on 2 July 2025.⁸¹ NBN Co's application proposed that the next regulatory cycle run for 3 years and that:

- additional benchmark service standards, and improvements to some existing standards, take effect progressively over this period
- it would make significant additional investment in its networks and systems, mainly through network upgrades that extend its fibre footprint and introduce LEO satellite services for locations not served by its terrestrial networks, while reducing its operating expenditures
- the weighted average cost of capital, which is used to calculate NBN Co's annual revenue requirement, be reduced
- the NBN entry level price control continue to apply to the 25/5 speed tier broadband access product.

These are the default settings that would take effect should the ACCC decide not to issue a replacement module determination.⁸²

The ACCC is currently considering NBN Co's proposal in light of stakeholder feedback. The ACCC intends to release its draft replacement module determination in March 2026 and after considering further submissions, release its final decision in June 2026.

4.1.2 Resale fixed-line final access determination

On 16 December 2024, the ACCC concluded a public inquiry into access determinations for 3 resale fixed-line services:

- Wholesale Line Rental
- Local Carriage Service
- Wholesale ADSL.⁸³

The final determinations, effective from 17 December 2024 to 30 June 2029, establish regulated price and non-price terms where no commercial agreement exists.

In accordance with section 152BCA of the *Competition and Consumer Act 2010*, and informed by stakeholder submissions, the ACCC has rolled over the previous nominal price terms and retained the existing non-price terms from the prior determinations.

4.1.3 Domestic transmission capacity service final access determination

The ACCC published a final decision report on the domestic transmission capacity service access determination inquiry on 10 June 2025.⁸⁴ The ACCC decided to maintain the current non-price terms and conditions and roll over the existing price terms with minor amendments to account for the

80 NBN Co, [Replacement Module Application - Chapter 3 Engagement with stakeholders](#), 2 July 2025, p 6, accessed 1 December 2025.

81 ACCC, '[NBN Co's replacement module application](#)', 2 July 2025, accessed 1 December 2025.

82 NBN Co, '[NBN Co Special Access Undertaking](#)', 13 December 2013, clause 5.9(d), p 10, accessed 1 December 2025.

83 ACCC, '[Resale fixed-line services access determination inquiry](#)', 13 December 2024, accessed 1 December 2025.

84 ACCC, '[Domestic transmission capacity service final access determination inquiry - Final report](#)', 10 June 2025, accessed 1 December 2025.

new service description which came into effect 1 December 2025. The final access determination will expire on 31 March 2029, to align with the expiry date of the declared domestic transmission capacity service.

4.1.4 Voice interconnection final access determination

In June 2024, the ACCC commenced a combined public inquiry into making new access determinations for the voice interconnection services, which include the mobile terminating access service (MTAS), the fixed terminating access service (FTAS), and the fixed originating access service (FOAS).⁸⁵ These are wholesale services that enable subscribers from different networks to make calls to each other.

The ACCC intends to release a final report setting out the price and non-price terms of access to these services in December 2025.

4.1.5 Superfast broadband access service (SBAS) access determination inquiry and Binding Rules of Conduct

On 19 December 2024, the ACCC issued [binding rules of conduct](#) that specified additional regulated terms of access for the superfast broadband access service (SBAS) supplied by Uniti Group Pty Ltd and its related corporate entities (Uniti Group).

The ACCC issued the binding rules of conduct in response to industry concerns regarding the interconnection arrangements that Uniti Group had specified for retailers wanting to access its SBAS. The binding rules of conduct were intended to provide a temporary remedy, with a maximum duration of 12 months, by setting interim terms of access until new terms were determined through a public inquiry, which the ACCC commenced on 15 January 2025.

Following its public inquiry, the ACCC varied the SBAS access determination on 22 September 2025.⁸⁶ The varied SBAS access determination:

- incorporates additional access terms relating to the number and location of the points at which access seekers can be required to interconnect with an SBAS network
- includes additional safeguards to protect against the imposition of unreasonable access terms or conditions that would prevent access seekers from accessing the regulated terms
- requires SBAS providers to publish their standard wholesale pricing and access terms
- exempts Vision Network from the obligation to offer a centralised point of interconnection for its services in Mildura, Victoria.

4.1.6 ACCC review of Weighted Average Cost of Capital Methodology

In 2025, the ACCC has undertaken a review of its approach to the estimation of the weighted average cost of capital (WACC), which is used as an input to various regulatory determinations including those in relation to the telecommunications services regulated by the ACCC.

⁸⁵ ACCC, '[Voice interconnection services access determination inquiry](#)', 21 June 2024, accessed 1 December 2025.

⁸⁶ ACCC, '[Public inquiry to vary the final access determination for the superfast broadband access service](#)', 22 September 2025, accessed 1 December 2025.

As part of this review, we retained Cambridge Economic Policy Associates (CEPA) to advise on suitable methods for estimating the WACC, and to recommend methods that the ACCC should adopt in the telecommunications sector and other relevant industries regulated by the ACCC.

The ACCC consulted on CEPA's proposed methods as part of the voice interconnection services access determinations inquiry and the NBN Co replacement module process. As part of these processes, we also invited submissions from stakeholders in other sectors the ACCC regulates.

Following this review, on 28 November 2025, the ACCC published a statement setting out the methods for estimating the WACC that we will generally consider appropriate when performing our economic regulatory functions, including our regulatory processes in the telecommunications sector.⁸⁷

The ACCC will use the general methods set out in the statement as a starting point and consult on their application in future regulatory processes. The ACCC will consider whether to amend or depart from some or all of the methods in any of our regulatory processes, having regarded the particular circumstances and submissions received at the time.

The ACCC also intends to regularly review and update the statement while having regard to how it has been applied in regulatory processes, or in response to developments or changes in prevailing circumstances.

4.2 Carrier separation rules

The ACCC is responsible for administering the carrier separation rules in Part 8 of the *Telecommunications Act 1997* (Telecommunications Act).⁸⁸ These rules are intended to promote retail competition and choice for consumers on alternative fixed-line broadband networks, usually where the NBN is not available. The rules require superfast fixed-line residential broadband networks to be operated on a wholesale-only basis unless the network operator obtains an exemption from the ACCC. To obtain an exemption, the operator can either elect to be bound by the ACCC's class exemption (for network operators with no more than 12,000 residential customers) or give the ACCC a functional separation undertaking. This means that a company that controls a superfast broadband network cannot supply retail services over it unless an exemption applies.

In all instances, fixed-line network operators must offer wholesale services on an open access and non-discriminatory basis. Network operators that are subject to the ACCC's class exemption must also comply with the ACCC's superfast broadband access service final access determination, which sets maximum wholesale prices and other important terms and conditions for retailers to access their wholesale services (see section 4.1.5 for more information).

The ACCC can issue infringement notices or take action in the Federal Court seeking pecuniary penalties for non-compliance with the carrier separation rules, such as a network operator favouring its own retail operations. Legislative amendments in May 2024 have increased the penalty the Federal Court can impose to up to \$10 million per contravention.⁸⁹

The ACCC took its first enforcement action for an alleged contravention of the carrier separation rules in March 2025. TPG Telecom Limited paid \$75,120 in penalties after the ACCC issued it with four infringement notices for alleged contraventions of the Telecommunications Act by failing to comply with its joint functional separation undertaking⁹⁰ (see section 4.5.3 for more information).

87 ACCC, '[ACCC WACC Review](#)', 28 November 2025, accessed 1 December 2025.

88 ACCC, '[Industry guidance on the carrier separation rules](#)', 14 October 2022, accessed 1 December 2025.

89 See Schedule 5 of the [Telecommunications Legislation Amendment \(Enhancing Consumer Safeguards and Other Measures\) Act 2024](#).

90 ACCC, '[TPG pays penalties for alleged non-compliance with its Functional Separation Undertaking](#)', 26 March 2025, accessed 1 December 2025.

4.2.1 ACCC telecommunications infringement notice guidelines

On 3 June 2024, amendments to the Telecommunications Act came into force that, among other things, enable the ACCC to make guidelines for the issuing of infringement notices for certain alleged contraventions of the Telecommunications Act.

The ACCC subsequently made the *ACCC Telecommunications (Infringement Notices) Guidelines 2024*, which came into effect on 31 August 2024.⁹¹ The guidelines inform the ACCC's decision making in relation to exercising its infringement notices power for contraventions of civil penalty provisions relating to Part 8 of the Telecommunications Act. They also provide guidance to industry on the ACCC's approach to the discretionary matters that it may consider when deciding whether to give an infringement notice.

4.2.2 New class exemption instrument

In August 2020, the ACCC made a class exemption instrument, the Telecommunications (Superfast Broadband Network Class Exemption) Determination 2020 (the 2020 Determination). Smaller network operators with no more than 12,000 residential customers could elect to be bound by the 2020 Determination to be exempt from the wholesale-only requirement.

As the original class exemption instrument was due to expire on 26 August 2025, the ACCC proposed to make a new instrument implementing a replacement class exemption to ensure service continuity for residential customers served by network operators that have elected to be bound by the 2020 Determination.

On 29 April 2025, the ACCC issued a consultation paper seeking views from stakeholders on the draft replacement Telecommunications (Superfast Broadband Network Class Exemption) Determination 2025. The ACCC received one submission, from Superloop.⁹²

The ACCC subsequently made the Telecommunications (Superfast Broadband Network Class Exemption) Determination 2025 on 11 July 2025, which came into effect on 27 August 2025.⁹³ The exemption is designed to reduce the cost burden on smaller network operators in participating in superfast broadband markets and to encourage investment in new broadband infrastructure.

The list of network operators electing to be bound by the class exemption is available on the ACCC's [class exemption notices register 2025](#).

4.3 Telecommunications complaints data

4.3.1 Complaints to the ACCC

Consumers and small businesses contact the ACCC about a wide range of matters, including issues relating to telecommunications services. While the ACCC is not a complaint-handling body and does not resolve individuals' complaints, we use complaint information as a means to monitor market conduct, and to help identify issues for further investigation. The ACCC focuses on situations that may impact vulnerable consumers, harm the competitive process, or result in widespread consumer

91 ACCC, '[ACCC Telecommunications \(Infringement Notices\) Guidelines 2024](#)', 4 September 2024, accessed 1 December 2025.

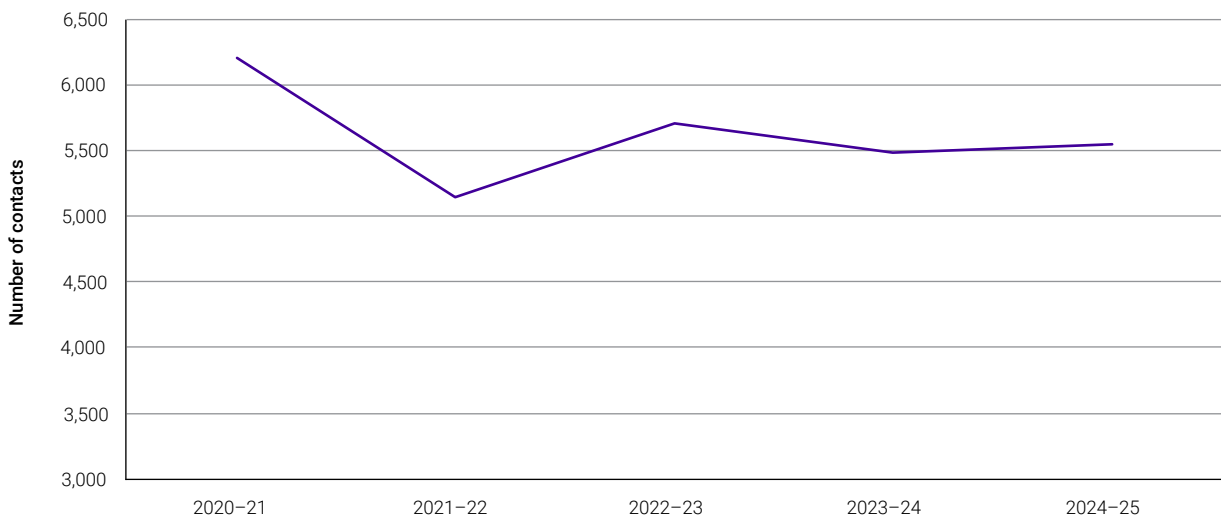
92 ACCC, '[Proposal to make a new superfast broadband network class exemption](#)', 29 April 2025, accessed 1 December 2025; Superloop, '[Submission on Draft Telecommunications \(Superfast Broadband Network Class Exemption\) Determination 2025](#)', 26 May 2025, accessed 1 December 2025.

93 ACCC, '[Superfast broadband network class exemption and deemed functional separation undertaking](#)', 11 July 2025, accessed 1 December 2025.

or small business detriment. Individuals may be referred to dispute-handling organisations, such as the Telecommunications Industry Ombudsman, that are better placed to assist.

During 2024–25, the ACCC received a total of 5,547 complaints relating to telecommunications matters, which is a small increase from 5,488 in 2023–24. Figure 28 illustrates the trend over recent years.

Figure 29: Telecommunications-related complaints to the ACCC, 2020–21 to 2024–25



The ACCC categorises complaints received by the alleged conduct(s) applicable under Schedule 2 of the *Competition and Consumer Act 2010* (The Australian Consumer Law). As shown in Table 2, complaints made to the ACCC in recent years have most often related to the ‘Misleading and deceptive conduct’ and ‘Guarantee as to acceptable quality’ categories. Approximately 60% of complaints in 2024–25 were referred to other agencies – mainly to the Telecommunications Industry Ombudsman and state-based agencies that are tasked with resolving consumer complaints and investigating issues outside of the ACCC’s remit.

Table 2: Telecommunications-related complaints to the ACCC by alleged conduct type, 2023–24 to 2024–25

Type of conduct under The Australian Consumer Law	2023–24	2024–25
18 – Misleading or deceptive conduct	2,416	2,265
54 – Guarantee as to acceptable quality	1,821	1,873
General – not covered by The Australian Consumer Law	916	559
36 – Wrongly accepting payment	419	476
60 – Guarantee as to due care and skill	203	276
29(1)(b) – False representations (service standard, quality, value or grade)	121	222
29(1)(m) – False representations (exclusion or effect of any condition, warranty, guarantee, right or remedy)	221	158
56–57 – Guarantee relating to the supply of goods by description, sample or demonstration	77	142
55 – Guarantee as to fitness for any disclosed purpose etc.	51	113
29(1)(i) – False representations (price)	86	108

Notes: Table includes the top 10 conducts for 2024–25 only. Figures for 2023–24 may differ from last year’s report due to contact updates or categorisation changes.

Table 3 shows that telecommunications complaints received by the ACCC are generally dominated by the largest providers by market share – Telstra, Optus and TPG Telecom. Between 2023–24 and 2024–25, the number of complaints relating to Telstra brands remained steady, while complaints relating to Optus and TPG brands decreased by around 10% each.

Table 3: Telecommunications-related complaints to the ACCC by provider, 2023–24 to 2024–25

Telecommunications provider	2023–24	2024–25
Telstra (includes Belong and Boost)	663	669
Optus (includes Amaysim)	672	602
TPG Telecom (includes iiNet, Internode and Vodafone)	478	432
Superloop (includes Exetel)	55	62
Vocus (includes Dodo and iPrimus)	68	61
Opticomm	31	38
Tangerine Telecom	32	36
Spintel	16	20
Southern Phone	11	19
Aussie Broadband	22	16

Notes: Table includes the top 10 providers for 2024–25 only. Figures for 2023–24 may differ from last year’s report due to contact updates or categorisation changes.

Table 3 does not account for the number of customers or service types for each provider, so the relative ranking may not be a full indicator of providers’ complaints performance.

For other telecommunications complaints data, see the Australian Communications and Media Authority's [Telco complaints-handling performance](#) and the Telecommunications Industry Ombudsman's [Annual Report 2024–25](#).

4.4 Mergers and authorisations

4.4.1 Vocus acquisition of TPG Telecom's fibre assets and Enterprise, Government and Wholesale fixed business

The ACCC commenced an informal review of Vocus Group Limited's proposed acquisition of TPG Telecom Limited's fixed-line business, enterprise government and wholesale customer base as well as its fibre and transmission networks on 18 November 2024.

Vocus' proposed acquisition included TPG Telecom Limited's network assets (fibre network, metropolitan, domestic, inter-capital and international subsea cable systems, and data centres), Vision Network and its wholesale, government and enterprise products and services.

Following a period of informal review and assessment, the ACCC announced on 20 March 2025 that it would not oppose Vocus Group Limited's proposed acquisition of TPG Telecom Limited's enterprise, government and wholesale business.⁹⁴

In not opposing the proposed acquisition, the ACCC concluded that the acquisition would not likely result in a substantial lessening of competition in any relevant market. The ACCC found that Vocus concentrates on supplying large enterprise and government customers, whereas TPG Telecom focuses on the small and medium enterprise segment of the market.

The ACCC also found that after the acquisition, Vocus will continue to face strong competitors including Telstra, Optus, Aussie Broadband, Superloop and managed service providers in supplying government, large enterprise, and small- and medium-enterprise customers.

As part of the review, the ACCC also considered the impact of the acquisition in the supply of fixed-line voice services, NBN wholesale aggregation services, and data centre, cloud and security services, and found that the acquisition would not likely result in a substantial lessening of competition in any of these markets.

4.5 Compliance and enforcement

4.5.1 Optus penalised for unconscionable conduct

In October 2024 the ACCC announced that it had commenced proceedings in the Federal Court alleging that Optus engaged in unconscionable conduct in contravention of the Australian Consumer Law when selling telecommunications goods and services to hundreds of consumers, that they often did not want or need, and in some cases then pursuing those consumers for debts resulting from these sales.⁹⁵ Optus' conduct impacted over 400 customers and occurred at 16 Optus stores between August 2019 and July 2023. Many of the impacted consumers were First Nations Australians from regional and remote areas or people from culturally and linguistically diverse backgrounds.

⁹⁴ ACCC, '[Vocus' proposed acquisition of TPG enterprise, government and wholesale business not opposed](#)' [media release], 20 March 2025, accessed 1 December 2025.

⁹⁵ ACCC, '[Optus in court for alleged unconscionable sales and debt collection](#)' [media release], 31 October 2024, accessed 1 December 2025.

In June 2025, the ACCC and Optus jointly asked the Federal Court to impose a total penalty of \$100 million.⁹⁶ On 24 September 2025, the Federal Court imposed a \$100 million penalty. In addition to the financial penalty, Optus also provided the ACCC with a five-year court-enforceable undertaking that it will compensate impacted consumers and improve its internal systems.⁹⁷

4.5.2 Telstra found to have misled nearly 9,000 Belong customers over broadband speed claims

In February 2025, the Federal Court found that Telstra made false or misleading representations relating to the upload speed of residential broadband internet services supplied to some of its Belong customers when it moved almost 9,000 customers to a lower speed plan in October and November 2020 without telling them.⁹⁸ In October 2025, the Federal Court ordered Telstra to pay a penalty of \$18 million. In addition to the penalty, under a court-enforceable undertaking all affected customers have been, or will be, remediated by Telstra with a credit or payment of \$15 for each month the customer had been on the lower upload speed plan.⁹⁹

4.5.3 TPG Telecom infringement notices for alleged non-compliance with its Functional Separation Undertaking

On 26 March 2025, the ACCC announced that TPG Telecom Limited paid \$75,120 in penalties after the ACCC issued it with 4 infringement notices for alleged contraventions of the Telecommunications Act by failing to comply with its joint functional separation undertaking.¹⁰⁰

TPG Telecom's undertaking included obligations designed to ensure separation of wholesale and retail functions as required by the carrier separation rules in the Telecommunications Act.

The ACCC alleged that TPG Telecom failed to have measures in place to prevent staff of its wholesale and retail businesses from accessing the other's premises unless accompanied to the extent practicable while on the premises, as required in the undertaking. The ACCC further alleged that on 4 occasions a senior TPG Telecom wholesale staff member worked unaccompanied in offices where TPG Telecom retail staff were located without any physical or other security barriers separating the respective staff.

The ACCC was concerned that the alleged conduct had the potential to affect competition in relation to the supply of retail broadband services to a significant number of consumers.

This is the first time the ACCC issued infringement notices for alleged contraventions of the Telecommunications Act and follows the ACCC's decision to make the *ACCC Telecommunications (Infringement Notices) Guidelines 2024*, which came into effect on 31 August 2024.¹⁰¹

96 ACCC, '[Optus agrees to \\$100m penalty, subject to court approval, for unconscionable conduct](#)' [media release], 18 June 2025, accessed 1 December 2025.

97 ACCC, '[Federal Court orders Optus to pay \\$100m penalty for unconscionable conduct](#)' [media release], 24 September 2025, accessed 1 December 2025.

98 ACCC, '[Telstra found to have misled nearly 9,000 Belong customers over broadband speed claims](#)' [media release], 21 February 2025, accessed 1 December 2025.

99 ACCC, '[Telstra fined \\$18 million for misleading Belong customers over broadband speed claims](#)' [media release], 3 October 2025, accessed 1 December 2025.

100 ACCC, '[TPG pays penalties for alleged non-compliance with its Functional Separation Undertaking](#)' [media release], 26 March 2025, accessed 1 December 2025.

101 ACCC, '[ACCC Telecommunications \(Infringement Notices\) Guidelines 2024](#)', 4 September 2024, accessed 1 December 2025.

4.6 Monitoring and reporting

4.6.1 Monitoring of application-to-person SMS markets

During the ACCC's combined declaration inquiry regarding 9 telecommunications services in 2023–24, we considered whether to regulate application-to-person SMS (A2P SMS) termination service as part of the mobile terminating access service. A2P SMS is used by businesses and government organisations to communicate with mobile consumers for a variety of purposes, including multi-factor authentication, appointment reminder, order or delivery tracking and marketing. The ACCC examined this issue due to concerns that increasing prices for A2P SMS termination services between the mobile network operators, which are used as an input to downstream A2P SMS services, may reduce competition and lead to higher prices in the wholesale and retail markets.

At the time, the ACCC decided to not regulate A2P SMS terminating services. However, the ACCC considered that there was potential for mobile network operators to raise wholesale prices which would be passed onto businesses and government users of SMS. The ACCC also considered it was unclear whether alternatives to A2P SMS, such as over-the-top messaging applications, dedicated mobile apps and emails, would constrain the ability of the mobile network operators to increase prices. The ACCC therefore committed to continue monitor how prices change over time and how potential substitutes to A2P SMS develop.

In June 2025, the ACCC conducted market inquiries with respect to key market participants, including mobile network operators, SMS aggregators and retail providers, and business and government users of A2P SMS. We sought information relating to developments in prices and the use of alternative communications methods to A2P SMS since the ACCC's declaration inquiry concluded in June 2024.

The market inquiries revealed that some SMS aggregators and retail providers are now experiencing increases in the wholesale prices charged by the mobile network operators. Notwithstanding this, the business and government users of SMS continued to have access to competitive SMS prices at the retail level. Business respondents noted they continue to heavily rely on SMS, and their demand for the service has grown. Business and government adoption of alternatives to SMS remained low, however many are considering potential alternatives to best meet their customers' needs.

Based on the information collected, the ACCC considers there is some evidence that wholesale prices are starting to increase for some SMS aggregators and retail providers, although the broader impact on the wholesale market at this stage is unclear. There is otherwise no evidence that any wholesale price increases have been materially impacting the retail market. On the other hand, there appears to be no significant development in the uptake of alternative communications methods. While many businesses have multiple ways of communicating with their customers, their reliance on A2P SMS is likely to continue, particularly for time-critical use cases.

The ACCC considers that continued monitoring of the A2P SMS markets is required to ensure we can respond appropriately to any competition issues arising in the markets. In particular, given the complexity of the pricing construct for this service, the ACCC requires better visibility over the wholesale prices charged by the mobile network operators to their customers on an ongoing basis to properly assess pricing development in this market. As such, the ACCC is exploring a record-keeping rule that requires the mobile network operators to report their wholesale prices on an ongoing basis.

4.6.2 Mobile Infrastructure Report

The Mobile Infrastructure Report is an annual publication that provides analysis on changes in mobile infrastructure and coverage. The analysis is based on information collected from Optus, Telstra and TPG Telecom under the Audit of telecommunications infrastructure assets record keeping rule.

The Mobile Infrastructure Report is typically published alongside disclosure of the underlining data provided by the mobile network operators.

This report and the accompanying data disclosure is intended to provide transparency and accountability over the investments in mobile infrastructure that have occurred over time. This helps consumers in making informed choices in selecting mobile services, and assists policy makers in considering measures that address mobile coverage issues.

The Mobile Infrastructure Report 2025 was published on 12 November 2025.¹⁰²

4.6.3 Measuring Broadband Australia program

The ACCC's Measuring Broadband Australia program continues to promote consumer choice in broadband services, providing transparent and independent information to inform consumers' purchasing decisions. The program promotes greater performance-based competition and fosters better internet performance throughout the country, encouraging retailers to deliver the speed and quality that consumers have paid for at times when consumers are most likely to use their services.

In March 2025, the Federal Government announced funding for the ACCC to continue delivering the Measuring Broadband Australia program for a further 12 months until June 2026.¹⁰³

Quarterly reports

The ACCC released Measuring Broadband Australia reports in September 2024, December 2024, March 2025 and June 2025.

Our reports found that, on average, broadband retailers are delivering download speeds to consumers that achieve their maximum plan speeds. The average download speed across all retail service providers on NBN fixed-line connections during busy hours (7–11 pm on Monday to Friday) was 100.4% of plan speeds in our September 2024 report.¹⁰⁴ This marked the first report in the program's history where this result exceeded 100%. This result continued to increase in each subsequent report during the year, reaching 101.6% of plan speeds in our June 2025 report.¹⁰⁵

This year's reports have highlighted performance on networks that provide an alternative service to Australians living outside of the fixed-line footprint.

Our September 2024 report observed improved download speeds on NBN Co's Fixed Wireless Plus plan after NBN Co increased the wholesale plan's maximum speeds.¹⁰⁶

In December 2024, the program's reporting expanded to measure performance on satellite broadband services for the first time. Our report found that Starlink services outperformed NBN Sky Muster services in terms of delivering faster download and upload speeds, and significantly lower latency.¹⁰⁷

After NBN Co completed upgrades to its network, our March 2025 report identified further performance improvements on fixed wireless services. This included increases in the average busy hour download and upload speeds measured on the NBN Fixed Wireless Plus plan. This report was also the first to feature services using the new Fixed Wireless Home Fast and Fixed Wireless

102 ACCC, '[Mobile Infrastructure Report 2025](#)', 12 November 2025, accessed 1 December 2025.

103 Commonwealth of Australia, '[Budget Paper No. 2: Budget Measures 2025–26](#)', 25 March 2025, p 69, accessed 1 December 2025.

104 ACCC, '[Measuring Broadband Australia – Report 26 – September 2024](#)', 17 September 2024, accessed 1 December 2025.

105 ACCC, '[Measuring Broadband Australia – Report 29 – June 2025](#)', 27 June 2025, accessed 1 December 2025.

106 ACCC, '[Measuring Broadband Australia – Report 26 – September 2024](#)', 17 September 2024, 1 December 2025.

107 ACCC, '[Measuring Broadband Australia – Report 27 – December 2024](#)', 5 December 2024, accessed 1 December 2025.

Superfast plans, with the small cohort of these services recording significantly higher speeds than the program had previously measured on the fixed wireless network.¹⁰⁸

Our June 2025 report compared performance on NBN Co's fixed wireless and Starlink's satellite networks and found that both networks can deliver download speeds above 100 Mbps during busy hour periods. While both networks were capable of high download performance, Starlink services delivered higher upload speeds.

Starlink services also recorded lower averages for latency and loading times for popular websites, while NBN fixed wireless services recorded fewer outages and lower packet loss. However, the difference in average performance for these metrics was minimal and unlikely to significantly impact the user's overall experience.¹⁰⁹

4.6.4 Telstra's Structural Separation Undertaking and Migration Plan compliance

Under its Structural Separation Undertaking and Migration Plan, Telstra is subject to a range of obligations relating to the progressive migration of fixed voice and broadband services from its legacy networks to the NBN.¹¹⁰

Section 105C of the *Telecommunications Act 1997* provides that each financial year, the ACCC must monitor and report to the Minister for Communications on any breaches by Telstra of its Structural Separation Undertaking. The ACCC completed an assessment of Telstra's compliance with its Structural Separation Undertaking for 2023–24, and published the report on the ACCC website on 10 March 2025, following its tabling in Parliament.¹¹¹

The report detailed that Telstra's compliance with its Structural Separation Undertaking obligations in 2023–24 was satisfactory overall. Some instances of Telstra's non-compliance occurred due to actions taken by Telstra to ultimately protect consumers from disconnection where no alternative service was available. Further, the overall instances of Telstra's non-compliance were lower than previous years – a reflection of the relatively low number of remaining services subject to obligations on Telstra's legacy fixed-line network.¹¹²

Variation to Telstra's Structural Separation Undertaking and Migration Plan

On 14 February 2025, Telstra submitted a request to the ACCC to vary its Structural Separation Undertaking and Migration Plan.¹¹³ On 17 June 2025, Telstra lodged a further revision to seek minor amendments to its variation request.¹¹⁴

Telstra's proposed variation primarily sought to reduce the reporting and disclosure requirements associated with the Structural Separation Undertaking and Migration Plan, including simplified annual reporting arrangements to the ACCC.

108 ACCC, '[Measuring Broadband Australia – Report 28 – March 2025](#)', 20 March 2025, accessed 1 December 2025.

109 ACCC, '[Measuring Broadband Australia – Report 29 – June 2025](#)', 27 June 2025, accessed 1 December 2025.

110 Telstra, '[Structural Separation Undertaking given by Telstra Corporation Limited to the Australian Competition and Consumer Commission under section 577A of the Telecommunications Act 1997](#)', 23 February 2012 (including variations up to 11 June 2025), accessed 1 December 2025; Telstra, '[Migration Plan given by Telstra Corporation Limited to the Australian Competition and Consumer Commission under section 577BDA of the Telecommunications Act 1997](#)', 24 August 2011 (incorporating amendments to 11 June 2025), accessed 1 December 2025.

111 ACCC, '[Telstra's Structural Separation Undertaking 2023–24](#)', 10 March 2025, accessed 1 December 2025.

112 ACCC, '[Telstra's Structural Separation Undertaking 2023–24](#)', 10 March 2025, p 2, accessed 1 December 2025.

113 ACCC, '[Telstra's proposed SSU and Migration Plan variations](#)', 16 April 2025, accessed 1 December 2025.

114 ACCC, '[Amended variation proposal for SSU and Migration Plan](#)', 17 June 2025, accessed 1 December 2025.

On 25 June 2025, the ACCC accepted Telstra's revised Structural Separation Undertaking and Migration Plan.¹¹⁵ The ACCC decision outlined that the variations would reduce unnecessary regulatory burden on Telstra, while maintaining transparency and accountability for the remaining migration process. The decision also noted that the variations would not impact the ACCC's ability to monitor and report annually to the Minister for Communications on Telstra's compliance with its Structural Separation Undertaking, as required under section 105C of the *Telecommunications Act 1997*.

The variations took effect on 25 June 2025.

4.6.5 Record keeping rule for NBN service quality and network performance

The NBN service quality and network performance record keeping rule commenced on 1 July 2024, and requires NBN Co to collect service quality and network performance data. This includes data on connections, fault rectification, outages, network speeds and congestion.

The record keeping rule promotes transparency of service quality that retail service providers and consumers experience when using the NBN and provides the ACCC and other stakeholders with important data for use in benchmarking NBN service performance, and identifying and monitoring systemic issues.

Disclosure Direction

The ACCC issued NBN Co with a Disclosure Direction for the record keeping rule on 18 December 2024. This requires NBN Co to make the quarterly reports prepared under the record keeping rule publicly available, together with an explanatory statement outlining relevant calculations and methodology for the record keeping rule, any significant commercial changes that have had an impact on the data reported, and a glossary of terms.

Quarterly reports

The ACCC has now collected and published over 12 months of data under the record keeping rule, with the first 2 reports published in March 2025, followed by publications in June 2025, August 2025 and November 2025. The record keeping rule reports are published on the ACCC's [website](#).

4.6.6 Non-NBN broadband provider record keeping rules

The ACCC is currently progressing a consultation process for a record keeping rule for non-NBN broadband providers. This will assist the ACCC in monitoring performance on key aspects of service quality across networks on the two largest non-NBN networks, Opticomm and Vision Network. This includes information on connection and fault rectification times, appointment keeping, and network outages.

On 13 November 2024, the ACCC published a consultation paper on the development of the record keeping rule for non-NBN superfast broadband network providers.¹¹⁶ The proposed record keeping rule builds on the current NBN Co service quality record keeping rule, and aims to establish appropriate reporting arrangements to allow for comparisons between fixed-line broadband networks. Following stakeholder submissions, we conducted a series of meetings with Opticomm

115 ACCC, '[Variation approved for SSU and Migration Plan](#)', 25 June 2025, accessed 1 December 2025.

116 ACCC, '[Consultation paper - Superfast broadband service quality and network performance record keeping rules](#)', 13 November 2024, accessed 1 December 2025.

and Vision Network in 2025 on the structure and scope of the proposed record keeping rules and their current reporting capabilities.

On 29 October 2025 we published a draft superfast broadband RKR covering Opticomm and Vision Network for public consultation.¹¹⁷ The draft RKR included the proposed tables of reporting metrics covering connections data, appointments, faults, outages, and other datasets. The consultation period for the draft RKR closed on 28 November 2025.

4.6.7 Record keeping rules review

Throughout 2024–25, the ACCC conducted an internal review of 5 record keeping and reporting rules. The ACCC published a consultation paper in July 2025, noting its initial findings and seeking stakeholder views on its proposed future for those record keeping rules.¹¹⁸ In conducting this review, for which work is continuing into 2025–26, the ACCC is considering what information will be required to perform its responsibilities under the CCA. As part of this process the ACCC decided to extend the NBN services in operation record keeping rule for a period of 5 years while its future is considered as part of the broader review.¹¹⁹

4.7 Advice, advocacy and consumer education

4.7.1 ACMA Telecommunications Numbering Plan

On 3 June 2024, the ACMA commenced a review of the *Telecommunications Numbering Plan 2015* and associated instruments, before they were due to sunset on 1 April 2025.¹²⁰ The Numbering Plan specifies the rules for the allocation, transfer, surrender, portability and use of different types of numbers in connection with carriage services.

The ACMA's review incorporated consultation with stakeholders, including the ACCC, on its proposed changes to the Numbering Plan, which were published on 13 November 2024.¹²¹ Under the Telecommunications Act, the ACMA cannot make or vary a numbering plan without first consulting the ACCC.¹²²

On 12 February 2025, the ACCC provided a submission to the ACMA on a draft Numbering Plan.¹²³ The submission outlined the benefits of clear guidance and rules within the Numbering Plan, and the importance of maintaining consumer confidence in the integrity of the numbering system. The submission also highlighted some contentious issues surrounding the allocation and use of numbers, and the capacity for the numbering framework to support competition while also incorporating appropriate consumer safeguards against scams.

Further, the ACMA may only include number portability rules in the Numbering Plan at the direction of the ACCC.¹²⁴ These long-standing provisions allow customers to take their fixed-line and mobile phone numbers with them when they change providers.

117 ACCC, '[Draft record keeping rules - Superfast broadband service quality and network performance record keeping rules](#)', 29 October 2025, accessed 1 December 2025.

118 ACCC, '[Record keeping rules review 2025 - Consultation paper](#)', 3 July 2025, accessed 1 December 2025.

119 ACCC, '[September 2025 extension of the NBN SIO record keeping rule](#)', 23 September 2025, accessed 1 December 2025.

120 ACMA, '[Review of the Numbering Plan and associated instruments](#)', June 2024, accessed 1 December 2025.

121 ACMA, '[Proposed changes to the Numbering Plan and other instruments](#)', November 2024, accessed 1 December 2025.

122 Section 461 of the *Telecommunications Act 1997*.

123 ACCC, '[ACCC submission to the ACMA on its proposed changes to the Numbering Plan and other instruments](#)', 12 February 2025, accessed 1 December 2025.

124 Section 458 of the *Telecommunications Act 1997*.

On 17 March 2025, the ACCC issued written directions to the ACMA to set out rules about the portability of allocated numbers in the new Numbering Plan in the same form as the existing portability rules. That is, to provide number portability rules for services which use geographic numbers, freephone numbers, local rate numbers and mobile numbers.¹²⁵ In making these directions, the ACCC had regard as to whether the portability of allocated numbers is required to promote the long-term interests of end-users. The ACCC also considered feedback from the ACMA, the Numbering Advisory Committee, and respondents to the ACMA's consultation on the Numbering Plan review.

On 24 March 2025, the *Telecommunications Numbering Plan 2025* and associated instruments came into force, including the remade number portability provisions as directed by the ACCC.

4.7.2 Regional Broadband Scheme levy

On 28 November 2025, the ACCC published its advice to the Minister for Communications in relation to the costing of the *Regional Broadband Scheme levy - Base and administrative components* for the 2025–26 to 2029–30 period.¹²⁶ The ACCC provided this advice to the Minister by 26 May 2025, as required by the *Telecommunications (Regional Broadband Scheme) Charge Act 2020* (the Charge Act). The ACCC published its advice after it was considered by the Minister.

The Australian Government introduced the Regional Broadband Scheme levy to fund the financial losses of NBN Co's fixed wireless and satellite networks deployed in regional Australia. The scheme imposes a legislated levy on fixed-line superfast broadband network carriers. The levy comprises a base component intended to offset NBN Co's financial losses for the supply of fixed wireless and satellite communications services and an administrative component to offset the cost of the Australian Communications and Media Authority administering and collecting the levy.

The Charge Act set the levy amount at \$7.10 per chargeable premises per month for the first eligible financial year from 1 January to 30 June 2021, and it has been indexed annually by the consumer price index (CPI) since. The charge amount for the 2023–24 reporting period was \$8.26 per chargeable premises, per month, composed of \$8.26 for the base component and \$0.0027 for the administrative component.

The provision of advice to the Minister followed the publication of a consultation and position paper on 15 November 2024. The paper put forward the ACCC's views on several threshold and other issues regarding our proposed approach to calculating the Regional Broadband Scheme levy for the purposes of advising the Minister and called for submissions. We received 11 submissions.

The ACCC's advice includes estimates of:

- NBN Co's losses related to fixed wireless and satellite services from 2009–10 to 2024–25
- forecasts of its future losses for these services between 2025–26 and 2039–40
- the levy amount required to offset future losses.

The advice recommended a Regional Broadband Scheme levy base component amount for the 2025–26 to 2029–30 period of \$2.1706 (2025 dollars) per chargeable premises, per month and an administrative component amount of \$0.00665 (2025 dollars) per chargeable premises, per month. The levy would continue to be indexed by CPI during this period.

The recommended base component amount offsets NBN Co's forecast future losses for fixed wireless and satellite services only. The advice recommends that carriers should not be levied a base component amount for past losses, as the ACCC considers that NBN Co's Special Access

¹²⁵ ACCC, '[Number portability directions - 17 March 2025](#)', 2 May 2025, accessed 1 December 2025.

¹²⁶ ACCC, '[Regional Broadband Scheme levy - ACCC advice to the Minister for Communications](#)', 28 November 2025, accessed 1 December 2025.

Undertaking (as varied in October 2023) includes arrangements for the recovery of past losses incurred by NBN Co for satellite and fixed wireless services.

On 27 November 2025, a determination to change the Regional Broadband Scheme levy charge amounts was tabled in Parliament. The determination adopted the ACCC's advice on the Regional Broadband Scheme levy amounts.

4.7.3 Updated guidance for retailers marketing broadband speeds

On 5 September 2024, NBN Co announced it would 'accelerate' (increase) the speeds of its 3 highest speed residential products supplied over Fibre to the Premises (FTTP) and Hybrid Fibre Coaxial (HFC) and introduce a new 2 Gbps tier on 14 September 2025.

In April and May 2025, to address potential issues for consumers from NBN Co's announcement, the ACCC publicly consulted¹²⁷ on updating our '*Broadband Speed Claims Industry Guidance*' to promote better consumer information on customer premises equipment, such as modems and routers, in-home setup, and the capabilities of broadband services.¹²⁸

On 4 July 2025, the ACCC issued updated guidance¹²⁹ to retailers offering broadband services to consumers, including services enabled by NBN Co's accelerated speeds. The updates focus on customer premises equipment, in-home setup and the capabilities of broadband plans. This includes guidance to retailers to help consumers assess whether a broadband plan suits their needs and avoid paying for an upgrade they do not need.

4.7.4 Expiring spectrum licences

The Australian Communications and Media Authority (ACMA) is considering the future of spectrum licences set to expire between June 2028 and October 2032.¹³⁰ The majority of these spectrum licences are currently held by the mobile network operators. The ACCC made a submission in response to the ACMA's stage 3 consultation paper, which sought feedback on the ACMA's preliminary views on spectrum covered by expiring spectrum licences.

The ACCC submission generally supported the renewal of licences held by the mobile network operators for the purpose of deploying mobile services, on the basis that this would promote competition, support regulatory stability, encourage infrastructure investment and ensure the continuity of essential mobile services for the public.

However, the ACCC expressed reservations regarding the potential renewal of Telstra's 2.3 GHz band in remote areas, as there was insufficient information indicating Telstra's proposed use of the spectrum for private network services would promote the long-term public interest. The ACCC outlined concerns that renewal of this spectrum would provide Telstra with significant competitive advantage to the detriment of competition in the private wireless network market.

4.7.5 Telecommunications Consumer Protection Code

The ACCC continued to advocate for substantive protections for telecommunications consumers throughout the Telecommunications Consumer Protections (TCP) Code Review 2024–25.

127 ACCC, '[Industry guidance and 2025 review](#)', 30 April 2025, accessed 1 December 2025.

128 ACCC, '[Broadband speed claims industry guidance](#)', 4 July 2025, accessed 1 December 2025.

129 ACCC, '[Guidance on broadband speed claims for retail service providers](#)', 4 July 2025, accessed 1 December 2025.

130 More information is available on the [ACMA website](#).

In February 2025, the ACCC provided a submission to the Australian Telecommunications Alliance's (formerly Communications Alliance) public consultation on a draft new TCP Code.¹³¹ Our submission argued that the draft Code needed significant changes to ensure it provides adequate consumer protections. Some of our key concerns included that:

- Telecommunications should be recognised as an essential service in the Code.
- Specific obligations in the Code should be supported by broader general and outcomes focussed obligations to avoid unsuitable contracts and to deliver fair and reasonable outcomes for consumers.
- Incentive-based selling can lead to real harm for consumers and, as we have previously argued, consideration should be given to banning this practice in telecommunications.

The ACCC's submission argued that direct regulation was an appropriate response to the shortcomings of the draft TCP Code and the need for strong protections for telecommunications consumers. It also noted our support for direct regulation already utilised for protections previously covered in the TCP Code, including protections for telecommunications consumers experiencing financial hardship, consumers experiencing family and domestic violence, and provisions regarding complaint handling.¹³²

The Australian Telecommunications Alliance submitted the draft TCP Code to the ACMA to consider for registration in May 2025, following this public consultation.¹³³

The ACMA announced in October 2025 that it decided not to register the draft TCP Code.¹³⁴ While the ACMA noted it considers the draft 'a marked improvement on the existing Code', it did not consider the draft Code met the legislative requirements for registration under the *Telecommunications Act 1997*.

The ACCC strongly welcomes the ACMA's decision not to register the draft Code. The ACCC agrees that the draft Code does not meet the legislative requirements to provide appropriate community safeguards. As we have previously noted, it is critical that the code is able to deliver substantive protections for consumers.

The ACMA also found that the existing TCP Code is deficient, and issued a formal notice to the Australian Telecommunications Alliance requiring it to address these deficiencies within 30 days. If the Alliance cannot address these deficiencies, the ACMA will have the option to move towards creating an industry standard to take the place of the TCP Code.

The ACCC will continue to engage with this process and push for appropriate consumer protections.

131 ACCC, '[ACCC submission to public consultation on December 2024 draft code](#)', February 2025, accessed 1 December 2025.

132 See *Telecommunications (Financial Hardship) Industry Standard 2024*, *Telecommunications (Domestic, Family and Sexual Violence Consumer Protections) Industry Standard 2025* and *Telecommunications (Consumer Complaints Handling) Industry Standard 2018*.

133 Australian Telecommunications Alliance, '[Telco industry submits major revision of Telecommunications Consumer Protections Code – Further strengthening consumer safeguards](#)' [media release], 20 May 2025, accessed 1 December 2025.

134 ACMA, '[ACMA rejects proposed telco industry code](#)' [media release], 24 October 2025, accessed 1 December 2025.

Appendix

Pricing data tables

Annual price changes (%) – advertised monthly price

Table 4: Advertised monthly price changes (%) for the 25th percentile from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	0.1	7.2	0.0	-2.8	7.0
Non-NBN	0.0	7.7	7.2	5.4	0.0
Non-NBN (including home wireless broadband)					0.1
Post-paid mobile phone	0.0	0.0	0.0	19.2	10.7
Pre-paid mobile phone	16.2	-19.7	7.1	16.7	7.1
Total mobile phone	16.6	-4.0	4.1	0.0	12.0
Mobile network operators		0.0	0.0	12.5	8.9
Sub-brands		-19.7	0.0	25.0	0.0
Mobile virtual network operators		0.0	0.0	25.0	7.2
Mobile broadband	0.0	0.0	0.0	10.0	13.6

Source: ACCC estimates based on information from retailers' websites.

Table 5: Advertised monthly price changes (%) for the median from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	6.3	4.7	6.6	-10.4	9.3
Non-NBN	6.6	0.1	12.5	5.6	0.0
Non-NBN (including home wireless broadband)					2.3
Post-paid mobile phone	2.9	23.6	-10.1	6.3	3.5
Pre-paid mobile phone	0.0	0.0	6.7	2.1	4.1
Total mobile phone	2.1	0.0	0.0	7.1	6.4
Mobile network operators		10.0	5.5	-5.2	7.3
Sub-brands		0.0	3.3	-3.2	16.7
Mobile virtual network operators		0.0	0.0	13.3	2.9
Mobile broadband	12.9	-11.5	0.0	14.4	-12.5

Source: ACCC estimates based on information from retailers' websites.

Table 6: Advertised monthly price changes (%) for the 75th percentile from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	11.1	9.0	4.6	-7.9	0.0
Non-NBN	0.0	11.1	10.0	8.2	-3.4
Non-NBN (including home wireless broadband)					-2.7
Post-paid mobile phone	0.0	16.0	-9.5	14.3	-1.7
Pre-paid mobile phone	3.4	-11.1	12.5	0.0	0.0
Total mobile phone	1.8	7.4	-6.7	0.0	5.0
Mobile network operators		7.7	-2.9	-1.5	3.0
Sub-brands		0.0	0.0	0.0	12.5
Mobile virtual network operators		12.5	-11.1	22.5	0.0
Mobile broadband	10.2	-9.1	0.0	16.0	-5.2

Source: ACCC estimates based on information from retailers' websites.

Annual price points (\$) – advertised monthly price

Table 7: Monthly average price points (\$) for the 25th percentile from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	\$69.99	\$75.00	\$75.00	\$72.93	\$78.00
Non-NBN	\$64.95	\$69.95	\$74.98	\$79.00	\$79.00
Non-NBN (including home wireless broadband)				\$74.95	\$75.00
Post-paid mobile phone	\$25.00	\$25.00	\$25.00	\$29.80	\$33.00
Pre-paid mobile phone	\$24.90	\$20.00	\$21.43	\$25.00	\$26.79
Total mobile phone	\$24.99	\$24.00	\$24.99	\$25.00	\$28.00
Mobile network operators	\$40.00	\$40.00	\$40.00	\$45.00	\$49.00
Sub-brands	\$24.90	\$20.00	\$20.00	\$25.00	\$25.00
Mobile virtual network operators	\$20.00	\$20.00	\$20.00	\$25.00	\$26.80
Mobile broadband	\$20.00	\$20.00	\$20.00	\$22.00	\$25.00

Source: ACCC estimates based on information from retailers' websites.

Table 8: Monthly average price points (\$) for the median from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	\$85.00	\$89.00	\$94.90	\$92.95	\$92.95
Non-NBN	\$79.95	\$80.00	\$90.00	\$95.00	\$95.00
Non-NBN (including home wireless broadband)				\$89.95	\$92.00
Post-paid mobile phone	\$36.00	\$44.50	\$40.00	\$42.50	\$44.00
Pre-paid mobile phone	\$32.14	\$32.14	\$34.29	\$35.00	\$36.43
Total mobile phone	\$35.00	\$35.00	\$35.00	\$37.50	\$39.90
Mobile network operators	\$50.00	\$55.00	\$58.00	\$55.00	\$59.00
Sub-brands	\$29.99	\$30.00	\$31.00	\$30.00	\$35.00
Mobile virtual network operators	\$30.00	\$30.00	\$30.00	\$34.00	\$35.00
Mobile broadband	\$39.50	\$34.95	\$34.95	\$40.00	\$35.00

Source: ACCC estimates based on information from retailers' websites.

Table 9: Monthly average price points (\$) for the 75th percentile from 2020–21 to 2024–25

	2020–21	2021–22	2022–23	2023–24	2024–25
NBN	\$100.00	\$109.00	\$114.00	\$105.00	\$105.00
Non-NBN	\$90.00	\$99.97	\$110.00	\$119.00	\$115.00
Non-NBN (including home wireless broadband)				\$113.00	\$110.00
Post-paid mobile phone	\$50.00	\$58.00	\$52.50	\$60.00	\$59.00
Pre-paid mobile phone	\$48.21	\$42.86	\$48.21	\$48.21	\$48.21
Total mobile phone	\$49.90	\$53.57	\$50.00	\$50.00	\$52.50
Mobile network operators	\$65.00	\$70.00	\$68.00	\$67.00	\$69.00
Sub-brands	\$39.99	\$40.00	\$40.00	\$40.00	\$45.00
Mobile virtual network operators	\$40.00	\$45.00	\$40.00	\$49.00	\$49.00
Mobile broadband	\$55.00	\$50.00	\$50.00	\$58.00	\$55.00

Source: ACCC estimates based on information from retailers' websites.

