

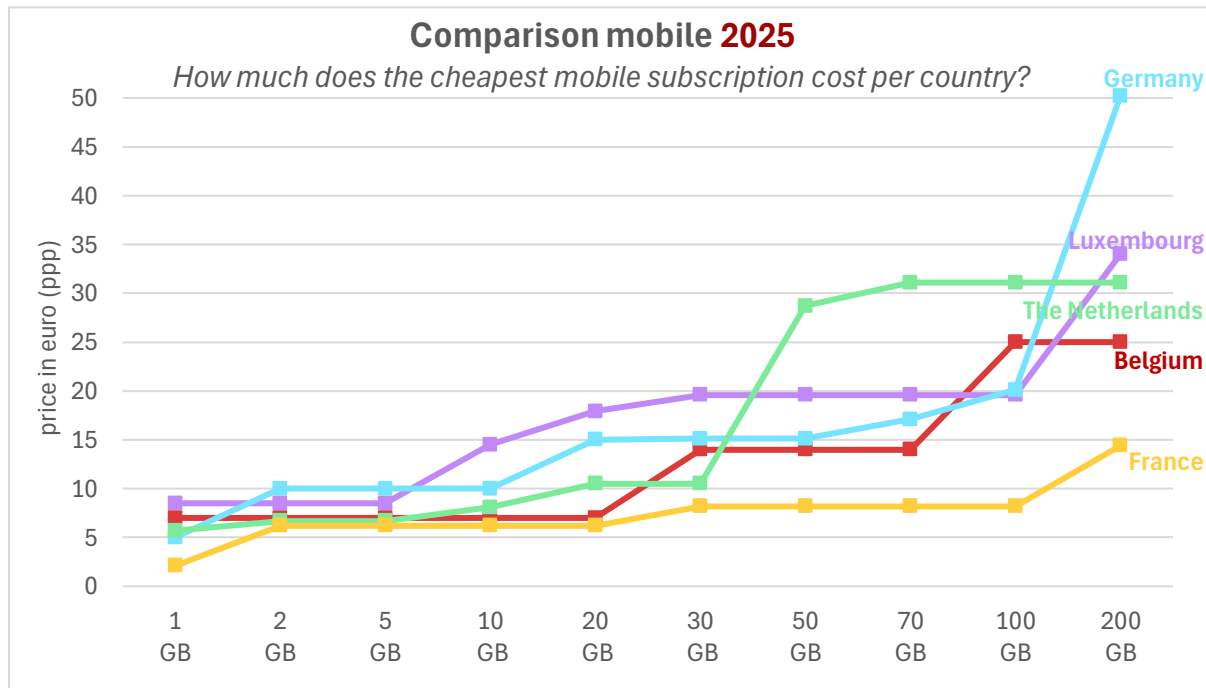
# BELGIAN INSTITUTE FOR POSTAL SERVICES AND TELECOMMUNICATIONS

## PRESS RELEASE

### The BIPT publishes its 2025 international comparative price study

Brussels, 17 December 2025 - The BIPT publishes its annual study in which the prices of telecom services in Belgium are compared with those in the neighbouring countries. This study shows that, unlike previous years, Belgium no longer stands out for smaller mobile subscriptions with data needs up to 10 GB included. This is the result of the arrival of the fourth mobile operator. For the highly data-intensive users who require at least 200 GB, our country has also become remarkably more competitive this year. While the competitive pressure on the mobile market has clearly increased, it remains limited in the fixed market, where Belgium generally belongs to the more expensive half of the countries studied. Especially for the popular most extensive packs, our country is by far the most expensive.

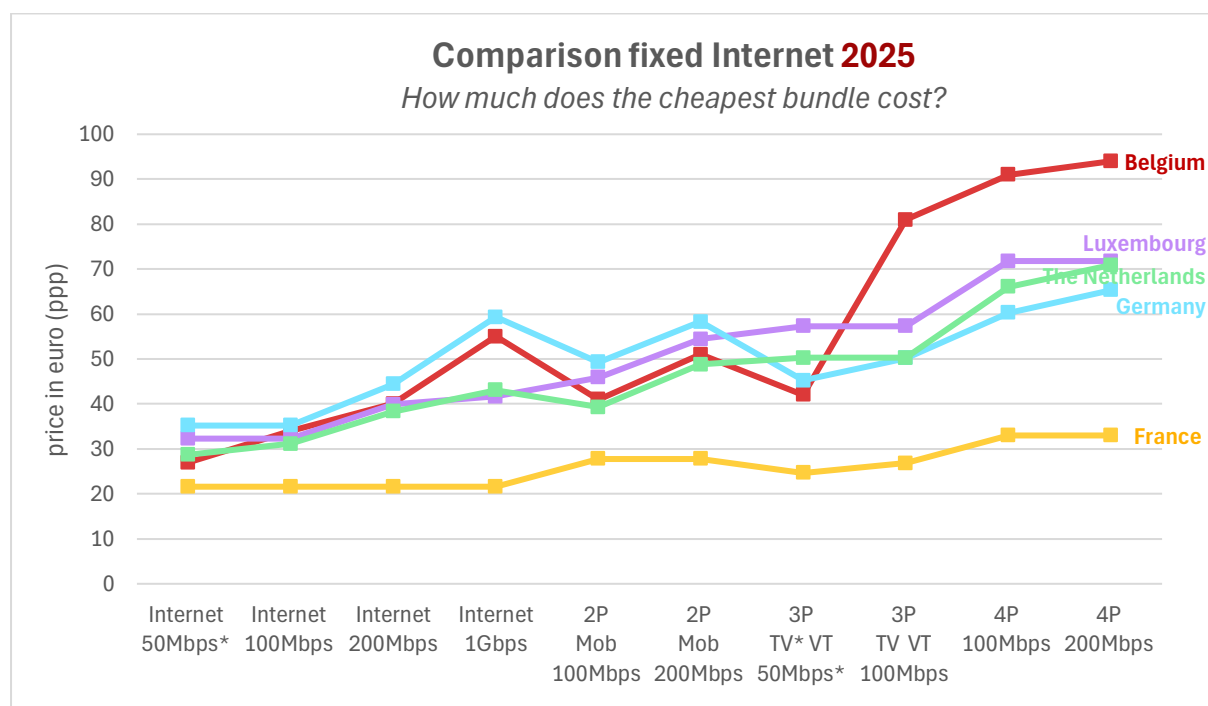
The BIPT has once again compared our country's telecommunications services rates for private persons with those in Germany, France, Luxembourg and the Netherlands. The study is based on the October 2025 prices and maps out the cheapest offer on the market for a number of consumer profiles. Only operators with a market share of at least 5% have been included in the comparison.<sup>1</sup> The mobile profiles have different data needs and each requires at least 200 text messages and 1,000 call minutes.



<sup>1</sup> The Belgian fourth operator, DIGI, does not yet meet the market share criterion and has therefore not been included in the analysis.

France remains the cheapest country overall. For small mobile subscriptions up to 5 GB included, Belgium belongs to the middle bracket of the price comparison. For somewhat larger subscriptions of 10 and 20 GB, prices are usually low; only in France they are even lower. For larger data needs between 30 and 70 GB, Belgium remains rather advantageous, but the gap with our southern neighbour is widening. For very data-intensive subscriptions the picture is mixed: for a 100 GB need, Belgium is the second most expensive country, while for 200 GB it is the second cheapest country in the comparison.

The results for Belgium were driven by two notable developments that had an impact on the dynamics in the mobile market. On the one hand, the arrival of the fourth operator, DIGI, initially created additional competition and a marked decrease of the minimum prices for subscriptions up to 20 GB. This effect remains visible, albeit somewhat diminished. On the other hand, several secondary brands have<sup>2</sup> expanded their offer to the highest segment, which has also reduced the minimum price for the largest profile of 200 GB by as much as €14 compared to last year.



In the market for fixed internet and packs, Belgium generally remains among the more expensive half of the countries. Especially the most extensive bundles, which are the most popular among Belgian consumers, are by far the most expensive. France remains the cheapest country in this respect. The biggest difference is found for a 4P pack with a download speed of at least 200 Mbps: for the cheapest offer, a Belgian consumer pays €61 per month more than in France, almost three times as much.

While the dynamics in the mobile market have further improved, this is not the case for the fixed market. There, the prices of most internet subscriptions and packs increased over the past year, mostly without substantial improvement in features. This applies to all main brands, while the prices of the secondary brands remained virtually stable. The difference in dynamics can partly be explained by the fact that consumers are quicker to switch operators in case of a (mobile) stand-alone product than in case of a pack.

<sup>2</sup> Secondary brands are brands provided by the major operators in addition to their main brand. These brands often target price-sensitive customers with a cheaper offer. For Proximus these are Mobile Vikings and Scarlet, Telenet has BASE and TADAAM and Orange hey! and VOO.

DIGI's arrival at the end of 2024 has had a strong impact on the mobile market, while the impact on the fixed market is limited for the time being because DIGI's offer is still only available in a few cities.

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