BIPT Council Communication of 17 December 2024 regarding the comparative study on the prices of telecom services in Belgium and in the neighbouring countries [Tariffs of October 2024]

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TABLE OF CONTENTS

1. Executive summary

1. Every year the BIPT compares the prices of telecom services in Belgium and its neighbouring countries.[1] The last time this comparison was made was in December 2023.[2] In this section the results of this year's study, which are based on tariff plan information collected in October 2024, are summarised and compared to those of the previous edition.

2. In 2023 the BIPT concluded that Belgian mobile subscriptions were more expensive than in the neighbouring countries, except for medium-sized data volumes. One year later, the BIPT comes to the conclusion that our country proves to be very expensive for the smallest mobile subscriptions up to 10 GB, but that the prices have continued to be more competitive for the larger data needs. For needs from 30 to 70 GB Belgium is even the cheapest after France.

3. As for fixed Internet and bundles, it can be concluded just like last year, that Belgium generally belongs to the more expensive half of the neighbouring countries, with the exception of the low requirement profiles. For the heaviest bundles, which are most popular among Belgian consumers, Belgium is by far the most expensive.

4. There is a difference in competitive dynamics between the Belgian mobile and fixed market. When considering all mobile subscriptions, it appears that prices have remained stable over the past year, and certain operators have even implemented price reductions. Customers often received more value for their money, as the data volume in their tariff plans was increased. This was particularly true for the limited number of products whose prices were raised. Therefore, BIPT observes that the competitive dynamics in the mobile segment have improved. In the fixed segment the competitive dynamics showed no improvement. When we do not merely consider the minimum prices, prices of most of the fixed Internet and bundle offers were again raised in the past year without any clear improvements in the characteristics, also by Orange, which more and more takes the position of an incumbent on the market.

5. The difference in dynamics between the mobile market and the fixed bundles market 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 bundle. In addition the dynamics on the mobile market are influenced by the announced arrival of a fourth operator, DIGI, by the end of 2024. If DIGI launched convergent bundles (including fixed Internet), this could in time lead to a revival of the competitive dynamics on the fixed market.

6. It also turns out that a country where prices are high does not necessarily have a better network quality. In case of both mobile and fixed networks a clear link between price and quality is missing. In France, with its low prices and high-quality indicators, there appears to be an inverse relationship, at least for the fixed network.

[1] In previous editions of this study the United Kingdom was among the countries included in the study. Since Brexit, however, the British telecom market falls outside the scope of European regulation, so that a comparison continues to lose its relevance. That is why, starting from this year, the BIPT has decided not to include the United Kingdom in the study anymore.
[2] Communication of 18 December 2023 regarding the comparative study on the prices of telecom services in Belgium and in the neighbouring countries [Tariffs of October 2023] | BIPT

2. Mobile subscriptions

7. In this chapter the prices of mobile subscriptions in Belgium are compared to those in the neighbouring countries. For each consumer profile the cheapest subscription is selected per country and adjusted according to euro purchasing power parity. This study only focuses on operators with more than 5% market share, as well as their secondary brands, if any. A brief description of the methodology can be found in Annex 1The profiles have different data needs and require each time at least 200 SMS messages and 1,000 call minutes.

8. This study focuses on the comparison between prices in Belgium and those abroad. An extensive analysis focusing on the price evolutions of all mobile operators in Belgium and on how consumers can save money, can be found in the BIPT Communication of 2 December 2024 on tariffs of mobile services.[3]

2.1. 2024 international benchmark

9. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries for October 2024.

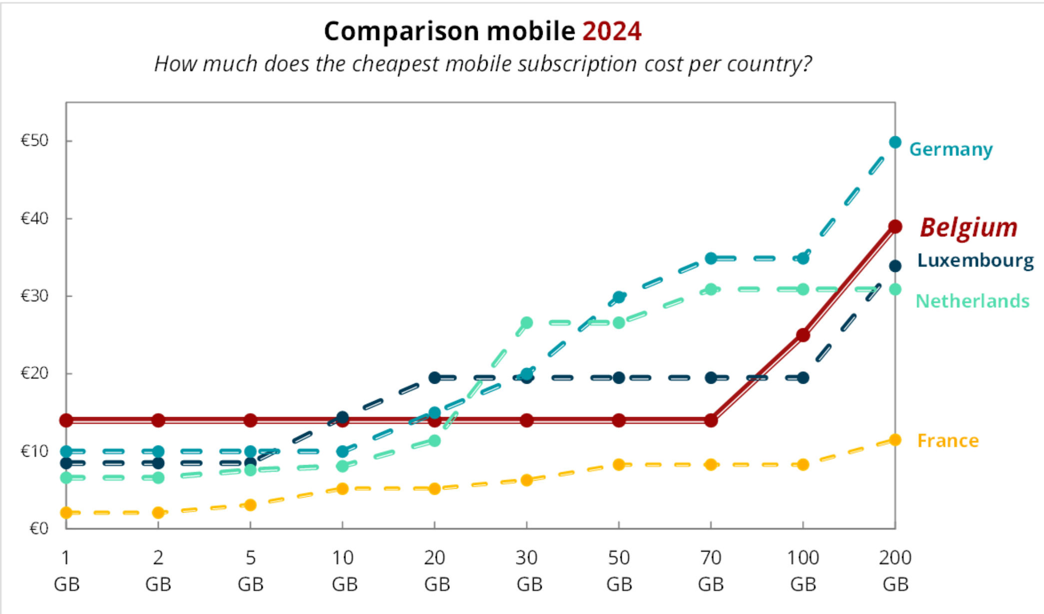

Figure 1. Price per month for the cheapest subscription, in purchasing power parity. October 2024.

10. How do the prices of the cheapest mobile subscriptions in Belgium relate to those in the neighbouring countries?

[3] Communication from the BIPT Council of 2 December 2024 regarding the results of the comparison of tariffs for mobile telecommunications services in Belgium [Tariffs applied in the 4th quarter of 2024]

10.1. In **Belgium** the prices for the smallest mobile subscriptions up to 10 GB tower above the rest.[4] For medium-sized data bundles of 20 GB our country is situated in the middle bracket. For subscriptions of 30 up to and including 70 GB France is the only country that is even cheaper, which makes us the cheapest country but for one. By contrast for the larger bundles of 100 up to and including 200 GB Belgium is on the more expensive side.

10.2. Both for the lowest and highest profiles **Luxembourg** is in the middle bracket, but it is situated on the more expensive side for 10 and 20 GB subscriptions. For the highest profile of 200 GB, however, Belgians still pay well over €5 more per month.

10.3. **Germany** is characterised by significantly lower prices than Belgium for the lowest user profiles, although prices quickly increase as the need for mobile data rises. For example, Belgian consumers who need more than 20 GB and choose the cheapest offer on the market are better off than customers in Germany having the same requirements.

10.4. In the **Netherlands** the pattern resembles the one in Germany: the smallest subscriptions are in line with the other countries but the price of a medium-sized subscription quicky increases and tops the price in Belgium in the categories of 30 up to and including 100 GB. For the highest profile of 200 GB, however, Belgians pay well over €8 more per month.

10.5. For each profile **France** has the lowest prices and finds itself for the most part even far below the other countries included in this study. For the lowest two profiles (1 and 2 GB) Belgium is more than five times as expensive as France, the price difference amounting to almost €12 a month. The biggest gap with Belgium is €27.5 a month for the 100 GB subscription, which amounts to an annual difference of €330.

2.2. Market dynamics and evolution

11. The table below shows per country how many brands place a subscription on the market that meets the requirements of data users.

	5 GB	**70 GB**	**100 GB**	**200 GB**
Belgium	8	7 (+1)	6 (+3)	4 (+2)
Luxembourg	4	4	4	4
Germany	6	4	4 (+1)	3
The Netherlands	6 (+1)	3	3	3
France	7	7	7	6 (+1)

Table 1. The number of brands offering a subscription, per needs profile (2024); the "+" in parentheses is the difference compared to 2023.

[4] The BIPT points out that the Belgian operators and their secondary brands offer basic subscriptions with a limited number of call minutes (usually 60 to 120 minutes), which are not taken into consideration because every profile requires at least 1,000 call minutes.

11.1. France is by far the cheapest country and has the highest number of active brands. Both the main brands (Bouygues, SFR, Orange and Free) and their secondary brands (Sosh, NRJ Mobile, Red-by-SFR) offer subscriptions up to and including 100 GB.

11.2. For countries in the middle bracket – Luxembourg, Germany and the Netherlands – the absence of the secondary brands in the highest segment is striking. In Germany and in the Netherlands low-cost brands are active for smaller data needs, but the highest data bundles are offered only by the main brands.

11.3. Belgium is a remarkable case. Until last year Belgium was the country with the least brands that were active for the minimum 200 GB profile, the only ones already offering such a subscription being Orange and Proximus. Last year more brands started to compete for the largest data users: Telenet and VOO now also offer subscriptions with more than 200 GB, bringing the total up to four providers. BASE, Mobile Vikings and hey! have extended their range to 70 or 100 GB. For the moment only Scarlet does not aim for that segment. As a consequence the biggest price cuts can be seen in subscriptions in the 30 to 200 GB category (see Table 2).

12. How has the market evolved in comparison with one year ago? Table 2 shows the price difference in euro purchasing power parity per profile. Note that the evolution is recorded based on a profile - thus changes can be due to the introduction of new subscriptions, price changes of existing subscriptions or data volumes having been raised, so that existing formulas now meet the requirements of a higher profile.

	1 GB	2 GB	5 GB	10 GB	20 GB	30 GB	50 GB	70 GB	100 GB	200 GB
Belgium	-1	-1	-1	-1	-1	-11	-11	-11	-14	-8
Luxembourg	0	0	0	-2	3	3	3	-14	-14	0
Germany	5	-2	-2	-2	-5	-7	0	0	0	-13
The Netherlands	-1	-1	-1	-1	-12	0	0	0	0	0
France	-3	-6	-5	-3	-3	-4	-2	-2	-2	-7

Table 2. Price difference in euro PPP per month (October 2024 vs 2023). Rounded off to one euro.

12.1. In **Belgium**, the minimum prices have not increased for any profile. In 2024 hey! adapted its mobile offer in such a way that consumers with a need for 30, 50 or 70 GB of data, save no less than €11 a month for the cheapest subscription available compared to last year. For subscriptions of 100 GB minimum the savings even amount to €14, because new providers are active for those needs.

12.2. In **Luxembourg** nothing changed for consumers having low data needs (up to 10 GB) last year. Because of a price increase (and data volume increase) by Orange Luxembourg there were price shifts among the cheapest available subscriptions. This was favourable for the 70 GB and 100 GB profiles (€14 cheaper), but to the detriment of consumers whose data needs vary from 20 to 50 GB (€3 more expensive).

12.3. By contrast, in **Germany** the decrease of the minimum prices was most pronounced for the profile of minimum 200 GB of mobile data (€13 cheaper). That is the consequence of a hefty price cut of a specific subscription from operator O2. The minimum prices have also gone down for the low and medium data volumes, except for the lightest profile (1 Gb), the price of which has increased by €5.

12.4. In **the Netherlands** the minimum prices for profiles with the highest data volumes have remained constant. For consumers with a data need between 1 and 10 GB the cheapest available offer decreased by €1. For consumers with a data need of 20 GB the cheapest offer in 2024 is €12 cheaper than the cheapest offer in 2023. This has to do with the fact that since 2024 the secondary brands are also active in this segment, whereas before, only the three main brands were.

12.5. Last year, **France** was already by far the cheapest country for mobile subscriptions. In 2024 that leading position is held. For all profiles the minimum price has decreased this year by €2 minimum; the profile of minimum 200 GB has decreased by no less than €7. For consumers having low data needs (1 GB, 2 GB and 5 GB) the cheapest offer this year costs less than half compared to 2023.

2.3. Conclusion

13. In 2023 mobile subscriptions were more expensive in Belgium than in the neighbouring countries, with the exception of those with medium-sized data volumes. One year later Belgium is still quite more expensive for the smallest subscriptions up to 10 GB. The prices for bigger data volumes, on the other hand, have become considerably more competitive and for data needs from 30 to 70 GB Belgium is even the cheapest after France. For the biggest data volumes of all, such as 100 or 200 GB, Belgium remains pricey in comparison with the neighbouring countries, although it is less pronounced than in previous years. These improvements are mainly thanks to the increased number of providers of subscriptions geared to intensive data users.

3. Fixed Internet and bundles

14. In this chapter the prices of fixed subscriptions and bundles in Belgium are compared to those in the neighbouring countries. For each consumer profile, per country, the cheapest bundle is selected, and adjusted according to euro purchasing power parity. 'Bundle' means a combination of products from the same operator. Therefore they do not necessarily have to be sold under one name. In this study only operators are discussed having a market share of more than 5%, including their low-cost brands, if any. A brief description of the methodology can be found in Annex 1

15. This study focuses on the comparison between prices in Belgium and those abroad. An extensive analysis of the prices of all operators providing bundles in Belgium, their evolution compared to last year and the way for consumers to save money, can be found in the BIPT Communication of 22 October 2024 on tariffs of fixed services and bundles.[5] Also relevant in this context is the BIPT Communication of 24 April 2024, mapping the evolution of residential prices of fixed Internet and bundles since 2019.[6]

3.1. 2024 international benchmark

16. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries based on the October 2024 prices. The profiles having a mobile component require each time 10 GB, 200 SMS messages and 1,000 call minutes. Download volumes for fixed Internet are unlimited unless they are asterisked, in which case 150 GB is sufficient. Television requires 50 channels unless asterisked, in which case 30 is enough. "FT" means fixed telephony. A 4P bundle includes Internet, mobile and fixed telephony and television.

17. VOO has recently introduced considerable price cuts, but because the operator is not active in Flanders and considering that some media report that Orange will stop selling products under theVOO brand name in 2025, it is useful to also look at the Belgian results without the VOO tariff plans.

[5] Communication of 22 October 2024 on the benchmarking of the fixed service and convergent bundle rates on the residential market [Tariffs applied in Q3 2024]
[6] Communication of 24 April 2024 on the evolution of the price of fixed and convergent residential telecom services over the past five years (from 2019 to 2024)

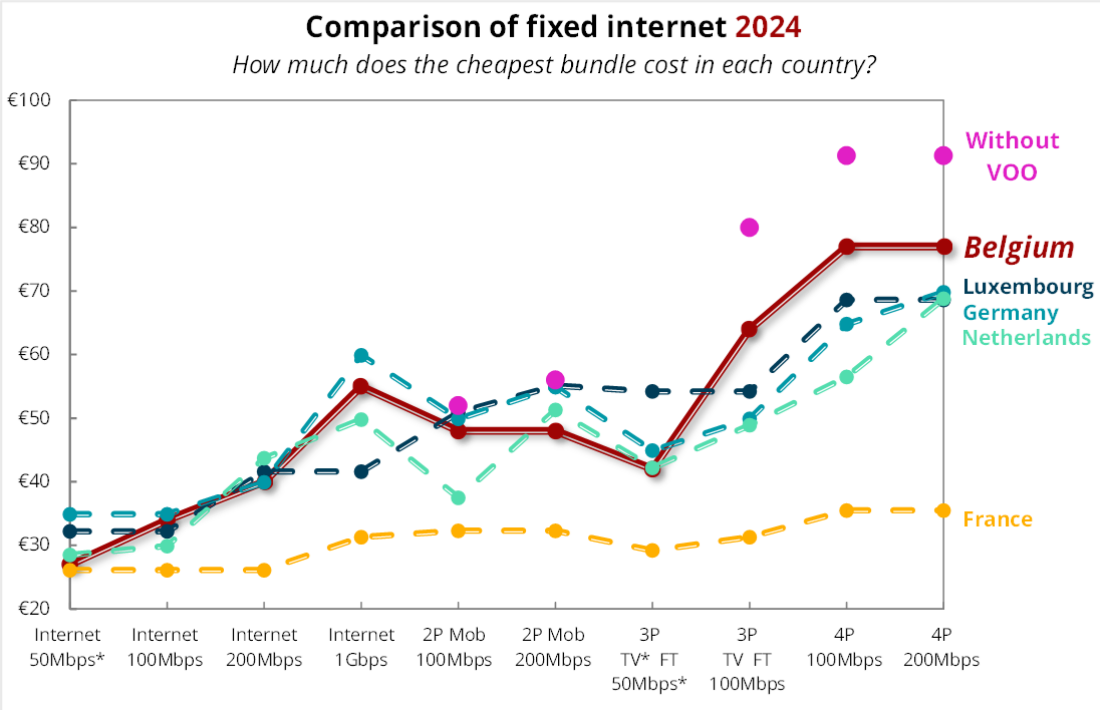

*Figure 2. Price per month for the cheapest bundle or combination of subscriptions, in purchasing power parities. October 2024. *see § 16*

18. How do the cheapest available prices in Belgium relate to those in the neighbouring countries?

18.1. As for the various profiles **Belgium** usually belongs to the more expensive half of the neighbouring countries, with the exception of the low-requirement profiles. For the heaviest bundles, which are most popular among Belgian consumers, Belgium is by far the most expensive.

i. Belgium is situated in the middle bracket for stand-alone Internet with 200 Mbps. For stand-alone Internet with 100 Mbps and 1 Gigabit only Germany is more expensive.

ii. For a basic stand-alone Internet subscription of minimum 50 Mbps and 150 GB download volume, Belgium is cheap. Here BASE offers since this year the Limited Internet subscription. It is important to note that the practice of operators offering subscriptions with a limited download volume, is only seen in Belgium anymore.

iii. As to the 2P bundle combining Internet with a mobile subscription of at least 10 GB, Belgium is in line with the more expensive countries for a minimum requirement of 100 Mbps. Here the Netherlands and France are notably cheaper. However, for a speed of 200 Mbps the relations are different: Belgian consumers do not have to pay much extra for the higher speed, also thanks to the introduction of the BASE Internet subscriptions.

iv. Fixed 3P bundles including Internet, television and fixed telephony show a strong dichotomy. If the requirement is 50 Mbps and a limited TV subscription of at least 30 channels, Scarlet Trio is an option, the price of which is in line with those in Germany and the Netherlands. However, as soon as another operator is needed because the number of TV channels required goes up to

50, Belgium towers above all other neighbouring countries. The same applies to 4P bundles, which additionally include a mobile subscription. The difference with the second most expensive country, Luxembourg, amounts to almost €10 a month.

v. The considerable price cuts recently introduced by VOO have an impact on the minimum prices taken into considation for 5 profiles. **Not counting VOO** the minimum price for the 3P of 100 Mbps and the 4P bundles would be more than €10 more expensive. It is not known whether and to what degree Orange would offer similar products at similar prices.

18.2. As far as stand-alone Internet is concerned, **Luxembourg** is situated in the middle bracket, but for bundles it is often the most expensive or the second most expensive country.

18.3. In **Germany** prices for stand-alone Internet, especially for gigabit speeds, are relatively high. In case of bundles combining mobile, television and/or fixed telephony Germany is often situated just below Luxembourg.

18.4. **The Netherlands** remain remarkably more expensive than France and lie much closer to the rest of the studied countries. Still, this country often turns out to be the second cheapest neighbouring country.

18.5. **France** is the cheapest country by far. The gap with Belgium is the biggest for the 4P bundles with a 200 Mbps download speed, where the difference is over €41. On an annual basis such a Belgian profile pays almost €500 more than the French counterpart.

3.2. Market dynamics and evolution

19. How has the market evolved in comparison with one year ago? Table 3 shows the price difference in euro purchasing power parity (euro PPP) per profile. Note that the evolution is recorded *per profile* - thus changes can be due to the introduction of new subscriptions, price changes of existing subscriptions or data volumes having been raised, so that existing formulas now meet the requirements of a higher profile.

	Internet *50Mbps**	Internet *100Mbps*	Internet *200Mbps*	Internet *1Gbps*	2P Mob 100Mbps	2P Mob 200Mbps	3P TV VT *50Mbps**	3P TV VT *100Mbps*	4P 100Mbps	4P 200Mbps
Belgium	-6	-2	1	0	-3	-9	0	-12	-10	-12
Without VOO[7]	-6	-2	1	0	1	-1	0	4	4	2
Luxembourg	2	2	6	-2	3	7	7	7	3	3
Germany	5	0	0	10	-5	-5	-3	-3	-10	-10
The Netherlands	-5	-3	6	7	-11	-2	-8	-1	-9	-1
France	-5	-5	-5	-5	-9	-9	-5	-5	-12	-12

[7] The situation in which VOO's offers in 2024 are excluded is shown here because Orange is likely to stop selling products under the VOO brand in 2025, and it is uncertain whether this impact will persist in the future. Moreover, VOO's offerings are not available in Flanders..

*Table 3. Price difference in euro PPP per month (October 2024 vs 2023). Rounded off to one euro. *see § 15.*

19.1. Compared to 2023 the amount that has to be paid in **Belgium** has decreased for nearly all profiles. Although most Belgian operators introduced general price indexations, a number of rearrangements in the offer resulted in the fact that the prices for the cheapest available subscriptions went down.

i. The price reduction in the stand-alone Internet subscription starting from 50 Mbps is thanks to BASE, a Telenet brand, which is offering fixed Internet at the national level since this year. It introduced a basic Internet subscription limited to 50 Mbps and a 300 GB download volume at €27 a month.

ii. In turn Scarlet raised the download speed of its Internet subscriptions to 100 Mbps, thus replacing hey! as the cheapest provider with its Loco subscription at €34.

iii. A 200 Mbps Internet subscription has become slightly more expensive, after the mother company, Orange, pulled the plug on the secondary brand Zuny. VOO and BASE now offer the cheapest option.

iv. The 100 Mbps and 200 Mbps 2P Internet subscriptions become respectively €3 and €9 cheaper following price cuts by VOO.

v. The same effect is seen for the 100 Mbps 3P bundle including television and fixed telephony and both 4P subscriptions, where VOO now turns out to be the cheapest option.

19.2. As for **Luxembourg** the BIPT observed in 2023 that the minimum prices generally evolved downwards, but that trend stopped this year.

19.3. In **Germany** the cost of both the most limited and the fastest Internet subscription has increased due to higher prices of 1&1. That same operator appears to be the main reason for the decreases of the minimum amounts that need to be spent on the bigger bundles.

19.4. In the **Netherlands** following the takeover by KPN, Youfone started to offer fixed services up to 200 Mbps. As a consequence the secondary brand suddenly becomes the cheapest provider for no less than eight out of the ten profiles. At the same time the costs of Internet subscriptions of 200 Mbps and 1 Gbps minimum went up following price hikes by Odido.

19.5. Last year **France** already was the cheapest neighbouring country by far. Competition continues to play unabated and the lowest possible amount one has to spend to meet the requirements, dropped for each profile. The dynamics in the mobile market are also observed in case of the bundles: prices of the 2P and 4P bundles that include a mobile subscription decrease even more than the other ones.

20. The BIPT notes that the mobile and fixed markets in Belgium were marked by different competition dynamics in the past year. On the mobile market competition increased, focusing especially on the segment with the highest needs, because more and more providers launched intensive-use products. On the fixed market though there were few new launches, except

those of BASE and smaller operators (which are not discussed in this study because of their market share, which is too small). When looking further than only the minimum prices and considering the entire offer, the following factors may explain that situation:

20.1. On the mobile market prices of the marketed subscriptions have generally remained stable. VOO and Orange even introduced a few price cuts. Moreover, in case of both stable and decreasing prices data volumes were raised. The limited number of cases where prices of existing mobile subscriptions were exceptionally raised, operators nearly always did so in the context of a more for more approach, whereby data volumes also increased.

20.2. The minimum amount that has to be paid in Belgium for nearly all profiles has dropped compared to 2023, as shown in Table 3. When not only the cheapest option is considered, the BIPT finds that the prices of most fixed Internet and bundle offers continued to increase in the last year, without any clear improvement in the characteristics. Orange's position shift from challenger to incumbent is again confirmed by two different price increases in 2024. Only VOO's prices showed a downward trend compared to 2023 following an initial increase. Despite that price decrease the BIPT can only conclude that the competition dynamics in this segment have not improved.

20.3. The difference between the mobile market and the fixed bundles can - at least partially - be explained by the fact that consumers switch operators more quickly in case of a stand-alone product compared to a bundle. The shifts in the mobile market are also stimulated by the announced market entry of the fourth operator DIGI by the end of 2024. If DIGI launched convergent bundles (including fixed Internet), this could also lead to a revival of the competitive dynamics on the fixed market.

3.3. Conclusion

21. With the exception of the stand-alone Internet basic profile requiring a minimum 50 Mbps speed and 150 GB download volume - for which the limited product taken into consideration for Belgium is irrelevant in an international context, since in the neighbouring countries only unlimited Internet is offered - Belgium belongs to the more expensive countries when it comes to stand-alone Internet. For gigabit Internet our country is typified as very expensive, and is only preceded by Germany.

22. As to the 2P bundle combining Internet with a 10 GB mobile subscription, Belgium is in line with the more expensive countries for a minimum requirement of 100 Mbps. For this 2P combination including 200 Mbps minimum the price is more reasonable. As for the lighter fixed 3P bundles that include Internet, TV and fixed telephony (50 Mbps and a limited TV subscription of 30 channels minimum) the price is good, in line with those in Germany and the Netherlands. Regarding the more heavy 3-Play with a minimum download speed of 100 Mbps and at least 50 TV channels the price in Belgium towers above that of all other neighbouring countries. The same applies to the 4P bundles.

23. The rearrangement of the VOO offer, with lower prices for new subscribers, has had an important impact on the Belgian results, in that it has had a lowering effect on the price level of five out of the six bundle profiles. Only for the 2P bundles though has this entailed a better ranking for our country. It is not known whether and to what degree Orange, which took over

VOO in 2023, would continue to offer similar products at similar prices and therefore it is uncertain if that impact will be permanent in the future.

24. Taking account of the above it can be concluded that Belgium can still be considered as rather expensive or even expensive for the fixed and bundle segment, with the exception of the two low-requirement profiles.

4. Network quality

25. The explanation often given for the difference in tariff levels between Belgium and its neighbouring countries are the degree of competition and the network quality. The competitive dynamics in Belgium have already been discussed above. In this section we examine whether a link can exist between the network quality and the price level in a country.

26. As far as the mobile network quality is concerned, two sources give a mixed image. The country qualified by the BIPT as the cheapest one in terms of mobile services - France - does not perform too well in the studies about the quality of the mobile networks. By contrast, the Dutch networks are among the best in Europe. The mobile download speed in Germany turns out to be low in an international context, and certainly in comparison with the other countries in the study, and yet the prices are rather expensive. Belgium performs better than Germany when it comes to download speed, but less so than other countries in the study. The mobile video experience is reasonable in Belgium.

	Level of mobile prices (BIPT study)	Indicators			
		Mobile download speed (Mbps, 112 countries)[8]		Mobile video experience (%, 85 countries)[9]	
1. France	Cheap	106	17th	67	37th
2. The Netherlands	Rather cheap to rather expensive	143	7th	73	7th
3. Luxembourg	Rather cheap to rather expensive	128	10th	*Not available*	
4. Belgium	Rather cheap to expensive	87	31st	68	24th
5. Germany	Rather expensive to expensive	58	46th	69	22nd

Table 4. Comparison between price level and network quality for mobile services.

27. The overview above by no means gives an exhaustive picture of the general network quality. It cannot be proved that there is a clear link between the quality of the mobile networks and the price level. In addition the price level is not clear either - with the exception of France. A correlation (not to mention a causal connection) between the quality of the mobile networks and the price difference between the countries studied therefore seems difficult to establish at first sight.

28. Concerning the quality of the fixed networks the observations made by various sources are summarised in the table below.

[8] The results of Speedtest.net refer to November 2024. (source: Speedtest)
[9] Mobile video experience measures the quality of videos streamed to devices by way of mobile data, based on factors such as image quality, download time and interruptions. A country's score is the highest score obtained by an operator in that country. That is also how the ranking has been established. (source: Opensignal)

	Price level of bundles (BIPT study)	Indicators					
		VHCN broadband coverage (%, 28 countries)[10]		FTTH/B coverage (%, 28 countries)[11]		Download speed (Mbps, 159 countries)[12]	
1. France	Cheap	81	13th	81	7th	247	6th
2. The Netherlands	Rather cheap	98	2nd	78	12th	192	20th
3. Germany	Rather expensive to expensive	75	21st	30	27th	93	57th
4. Luxembourg	Rather expensive to expensive	95	7th	79	8th	153	36th
5. Belgium	Rather expensive to expensive	96	5th	25	28th	106	47th

Table 5. Comparison between price level and network quality for fixed broadband Internet services.

29. For the fixed segment there does not seem to be a connection either between the price level and the quality of the fixed networks - at least as far as France is concerned. That country is the cheapest throughout while the quality indicators are among the best. The Dutch network has good quality too, even if that country can be qualified as rather cheap. Luxembourg has good broadband and FTTH coverage, but prices are rather expensive to expensive there. Broadband coverage (VHCN) in Belgium is excellent, but for FTTH roll-out our country is lagging behind. The download speed observed is the second lowest out of the five countries. Also for the fixed segment the price is not unequivocal either - with the exception of France. A correlation between the quality of the fixed networks and the price difference between the countries studied also seems difficult to establish at first sight.

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[10] This parameter relates to Fixed Very High Capacity Network (VHCN) coverage in % of households. (source: DESI 2024)

[11] FTTH/B coverage is the percentage of households having access to fibre up to the home or the building. (source: DESI 2024)

[12] The results of Speedtest.net refer to November 2024. (source: Speedtest)

Annex 1. Methodology

30. The international comparison discussed in this report by the BIPT follows the same method as the one used in the December 2022[13] and December 2023[14] studies. This annex repeats the main characteristics of that method.

31. The comparison concerns the nominal prices of fixed, bundled and mobile residential telecom services in six countries: Belgium, Germany, France, Luxemburg and the Netherlands. The data used for this comparison were collected in October 2024. In order to take account of existing socioeconomic differences between the countries considered, the nominal prices of each of the operators in each country were systematically normalised according to the "PPP" method ("purchasing power parity").

32. Just like the previous editions this study starts from demand, so the requirements that various types of telecom consumers want to have fulfilled. Practically, the BIPT established a range of consumer profiles defined on the basis of telecom needs to be met. Those needs are considered as a **minimum** to be met, which means that each solution that fulfils those needs (even when they include more services or volume than necessary) is considered to be acceptable for consumers. From all options in this study consumers will then choose the offer with the lowest price.

33. The prices selected to make the comparisons, are the prices of the cheapest offers which at the least fulfil those telecom needs that need to be satisfied for various consumer profiles. By way of comparison, in case of a consumer whose needs consist of at least a 1P mobile service with 10 GB of data, 1,000 call minutes and 200 SMS messages, the cheapest service capable of at least fulfilling this need will be selected for each operator in the analysis. Next the solutions obtained for each operator will be compared in order to determine which one is the cheapest per country. The latter result is then compared with the results obtained in the same way for the other countries, in order to confront the price level of each of those countries.

34. The prices used in the analysis are the recurrent prices charged in the long term for the services in question, i.e. without taking account of any temporary promotions nor once-only costs (installation and activation fees).

35. The operators whose offers were used to make this comparison are those having a fixed and/or mobile market share of more than 5% in their country. The secondary brands of those operators are also part of the panel studied. The full list of these operators is shown in the table below[15].

36. In 2024 the takeover of Youfone by KPN was greenlighted, so that this operator is also included in this study as a secondary brand of KPN.

[13] Communication of 14 December 2022 regarding the comparative study on the price level of telecom products in Belgium and in the neighbouring countries in 2022 [Tariffs of October 2022] | BIPT

[14] Communication of 18 December 2023 regarding the comparative study on the prices of telecom products in Belgium and in the neighbouring countries in 2023 [Tariffs of October 2023] | BIPT

[15] The market shares indicated in the table are those of 2020.

	Group/operator	Fixed broadband Internet and bundles	Mobile telephony
Belgium	Proximus Telenet VOO Orange	Proximus/Scarlet [40-50%] Telenet/Tadaam [30-40%] Voo/Zuny[16] [10-20%] Orange [<10%]	Proximus/Scarlet/M.Vikings [40-50%] BASE/Telenet [20-30%] Voo [<10%][14] Orange/hey! [20-30%]
Germany	Deutsche Tel. Vodafone O2 1&1 Freenet	Telekom/Congstar [30-40%] Vodafone [20-30%] O2 [<10%] 1&1 [10-20%] -	Telekom/Congstar [20-30%] Vodafone/SIMon [20-30%] O2 [20-30%] 1&1 [10-20%] Freenet [<10%]
France	Orange SFR Bouygues T. Free	Orange/Sosh [30-40%] SFR/Red-by-SFR [20-30%] Bouygues T. [10-20%] Free [20-30%]	Orange/Sosh [30-40%] SFR/Red-by-SFR [20-30%] Bouygues T/NRJMobile [10-20%] Free [20-30%]
Luxembourg	Post Lux Tango Orange Lux. Online	Post Lux [60-70%] Tango [10-20%] Orange [<10%] Lux. Online [<10%]	Post Lux [40-50%] Tango [30-40%] Orange [10-20%] Lux. Online [<10%]
The Netherlands	KPN VodafoneZiggo T-Mobile	KPN [40-50%] VodafoneZiggo [40-50%] T-Mobile [<10%]	KPN/Simyo/Youfone [20-30%] Vodafone/HollandseNieuwe [20-30%] T-Mobile/Tele2/Simpel[17] [30-40%]

Figure 3. List of operators meeting the criterion described above - The brackets indicate the operators' market shares (sources: national regulators, IDate 2021 and operators' financial publications)

37. As regards fixed Internet, subscriptions by way of Fixed Wireless Access (FWA) have not been considered because of their minor relevance on the market (less than 2% of connections at the end of 2023).

38. As far as television is concerned, subscriptions without a decoder, only available by way of an app have not been considered because of their minor relevance on the market (less than 3% of connections at the end of 2023).

[16] In the meantime VOO and Zuny have been taken over by Orange.
[17] In the meantime the brands T-Mobile and Tele2 have merged to become Odido.

Non-convergent profiles (no mobile component)

X Play	2022 study	Changes in 2023	Comments
1P Internet	50 Mbps – 150 GB	Unchanged	Corresponds with a consumer profile with limited needs
	100 Mbps – 150 GB	Unlimited volume	Almost all 1P BB services with 100 Mbps or more are sold with an unlimited volume
	200 Mbps – Unlimited volume	Unchanged	Corresponds with a consumer profile with moderate needs
	-	1 Gbps – Unlimited volume	New profile in order to take account of the growing availability of services with a speed higher than 1 Gbps.
2P BB FT	100 Mbps – Unlimited volume	Withdrawn	Profile represents only a marginal part of the market
3P BB TV FT	50 Mbps – Unlimited volume – 30 television channels	Volume limited to 150 GB	Profile changed to represent a consumer profile with limited needs
	100 Mbps – Unlimited volume – 50 television channels	Unchanged	Nearly all 3P BB-FT-TV services having at least 50 television channels are sold with a minimum speed of 100 Mbps

Convergent profiles (with mobile component)

X Play	2022 study	Changes in 2023	Comments
2P BB Mob	100 Mbps – Unlimited BB volume – 5 GB Mobile volume	Unchanged	Nearly all 2P BB-MT services are sold with a minimum speed of 100 Mbps
	200 Mbps – Unlimited BB volume – 5 GB Mobile volume	Unchanged	Profile in order to take account of the rise of services with a speed higher than 100 Mbps
4P	100 Mbps – Unlimited volume – 50 television channels	Unchanged	-
	200 Mbps – Unlimited volume – 50 television channels	Unchanged	-