

# **Intra-EU communications BEREC Benchmark Report April 2024 – March 2025**

2 October 2025

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# 1. Structure of the Report

The BEREC Benchmark Report on Intra-EU communications (the “Report”) consists of five sections. The second section provides an **Introduction** to the Report and describes BEREC’s work on intra-EU communications carried out under Regulation (EU) 2015/2120 of the European Parliament and of the Council of 25 November 2015, as amended by Regulation (EU) 2018/1971 of the European Parliament and of the Council of 11 December 2018. The third section, “**Regulatory evolution**”, outlines the background information behind the Intra-EU regulation. The key findings of this Report are presented in the fourth section, “**Main findings**”. The fifth section, “**Charts**”, presents the latest available data on Intra-EU mobile and fixed markets. “**Annex I: Methodology for the data collection**” provides a detailed description of the methodology for the current data collection. “**Annex II: List of respondents**” includes the list of operators that have contributed data for this Report. The Report is accompanied by a spreadsheet file that provides an easy and open access to the included data for the user.

## 2. Introduction

The Report presents the results of the 6<sup>th</sup> data collection on Intra-EU communications by BEREC, conducted after the implementation of the Regulation. Prior to this, BEREC also gathered data for a six-month period (1 October 2018 – 31 March 2019) to establish a baseline before the Regulation’s implementation.

The Report covers the period from 1 April 2024 to 31 March 2025, divided into two periods: from 1 April 2024 to 30 September 2024, and from 1 October 2024 to 31 March 2025. This corresponds to the 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> quarters of 2024, and the 1<sup>st</sup> quarter of 2025. The figures presented in this Report are based on data collected from national regulatory authorities (NRAs). The full set of data collected for this purpose are included in an accompanying .xlsx file and published on the BEREC website<sup>1</sup>.

The regulatory framework applicable to this data collection on intra-EU communications is established under Regulation (EU) 2015/2120 of the European Parliament and of the Council of 25 November 2015, as amended by Regulation (EU) 2018/1971<sup>2</sup> of the European Parliament and of the Council of 11 December 2018 and further amended by Regulation (EU) 2024/1309.

To assess the competitive developments in the Union-wide Intra-EU communications markets, BEREC has been tasked with regularly collecting data from national regulatory authorities on the development of retail charges for regulated Intra-EU communication services.

BEREC pursues the following objectives coordinating this data collection process:

- Coordinating the procedures of individual NRAs using a single, commonly agreed-upon data collection model. This model is synchronised and based on uniform

<sup>1</sup><https://www.berec.europa.eu/en/all-documents/berec/reports/intra-eu-communications-berec-benchmark-data-report-april-2024-march-2025>

<sup>2</sup> Regulation (EU) 2018/1971 of the European Parliament and of the Council of 11 December 2018 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1971&from=EN>.

collection periods. BEREC consults the market players and the European Commission before finalising the data collection templates;

- Providing a common interpretation to the different questions posed during the collection process by operators and NRAs, as BEREC serves as the forum where these questions are commonly debated and addressed.

The questionnaire on Intra-EU communications was sent to the NRAs on 17 March 2025. It included separate sheets for mobile and fixed networks and required responses from both mobile and fixed operators. For the purpose of this data collection, only mobile and fixed operators with at least 0.5 % market share (measured by total users — consumers and businesses) were invited to submit their data.

During spring 2025, retroactive plausibility checks have been conducted. Moreover, five NRAs provided data updates for previous years, due to corrections and amendments they had received from network operators. Therefore, some values in the accompanying Excel data report will differ from previous years' reports, and average values for previous years may have changed as well.

### 3. Regulatory evolution

Intra-EU communication caps have been in effect since 15 May 2019. The Regulation stipulates that any retail price (excluding VAT) charged to consumers for regulated intra-EU communications<sup>3</sup> shall not exceed EUR 0.19 per minute for calls and EUR 0.06 per SMS message.

The EU has taken significant steps to lower the prices of electronic communications between EU countries. A major milestone for the Digital Single Market was the elimination of roaming surcharges in 2017, followed by the implementation of price caps on intra-EU communications services in 2019.

The regulation introducing price caps on intra-EU communications services aims to ensure that competition, innovation and investment are not adversely affected. This means that, in exceptional circumstances, NRAs may grant a derogation from the price caps if applying them would significantly impact a provider's ability to maintain its current prices for domestic communications.

The retail price caps for regulated intra-EU communications – EUR 0.19 per minute for calls and EUR 0.06 per SMS (excluding VAT) – initially introduced by Regulation (EU) 2015/2120 (as amended by Regulation (EU) 2018/1971) and applicable since 15 May 2019, were set to expire on 14 May 2024. However, this regulatory framework has been extended through Regulation (EU) 2024/1309 of the European Parliament and of the Council of 29 April 2024 (Gigabit Infrastructure Act).

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<sup>3</sup> Regulated Intra-EU communications refer to any number-based interpersonal communications service originating in the Member State of the consumer's domestic provider and terminating at any fixed or mobile number of the national numbering plan of another Member State, and which is charged wholly or partly based on actual consumption.

The extension ensures that the current retail price caps will remain in force until 30 June 2032, providing continued protection for consumers using mobile and fixed calls or SMS from their domestic country to another EU Member State, as well as to Iceland, Liechtenstein and Norway (once incorporated into the EEA Agreement).

Article 17 of Regulation (EU) 2024/1309 provides for a gradual transition towards full price alignment between domestic and intra-EU communications. From 1 January 2025, operators are permitted to apply the same prices to domestic and intra-EU communications on a voluntary basis, subject to fair use and anti-fraud conditions. As of 1 January 2029, this alignment will become mandatory across the Union, with detailed implementing provisions to be adopted by 30 June 2028.

## 4. Main findings

Over 200 providers supplied data for this Report, which covers basically<sup>4</sup> all mobile and fixed network operators in the EEA countries, along with a significant number of mobile virtual network operators (MVNOs) that provide EEA international communications services.

### Consumption patterns of Intra-EU communication services

The usage of price-regulated intra-EU communication services continues to reflect varying patterns across fixed voice, mobile voice, and SMS.

Based on the latest data (Figure 31), the average number of regulated intra-EU minutes per month per subscriber increased slightly from 13.55 minutes (April – September 2024) to 13.77 minutes (October 2024 – March 2025).

As shown in Figure 33, the average number of regulated intra-EU mobile minutes per subscriber declined slightly from 4.66 to 4.54 minutes between the two latest reporting periods.

For regulated intra-EU SMS usage the downward trend is continuing, as shown Figure 35. The EEA average declined from 0.49 to 0.42 SMS per subscriber per month.

### Intra-EU communication services: regulated and alternative tariffs

BEREC analyzed the share of subscribers using intra-EU communication services under regulated price caps and those opting for alternative tariffs. For fixed networks, the average share of subscribers using regulated intra-EU communication services slightly decreased from 4.00% in Q2 – Q3 2024 to 3.84% in Q4 2024 – Q1 2025 (Figure 1). The adoption of alternative fixed tariffs remained very low, with only 0.21% of fixed subscribers using such plans in Q2 – Q3 2024 and 0.17% in Q4 2024 – Q1 2025 (Figure 5). In mobile networks, usage of regulated tariffs was significantly higher but also showed a modest decline, from 14.58% to 13.28% across the same periods (Figure 3). Only 0.34% of mobile subscribers used alternative tariffs in Q2 – Q3 2024 and 0.31% in Q4 2024 – Q1 2025 (Figure 7).

### Intra-EU communication revenues per unit

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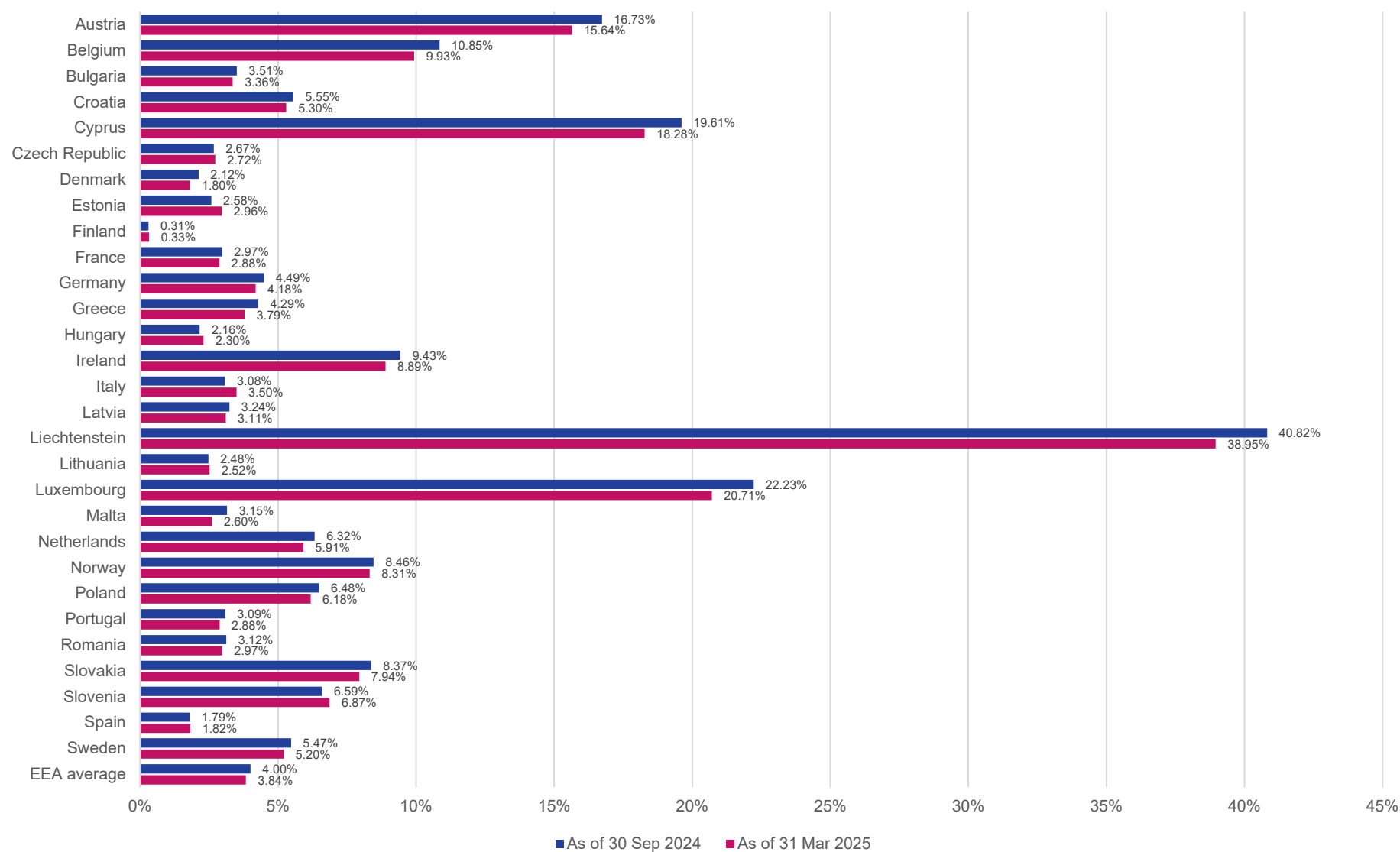
<sup>4</sup> This number includes all mobile and fixed operators in the EEA countries (including MVNOs) that provide EEA international communications services and had at least 0.5% market share.

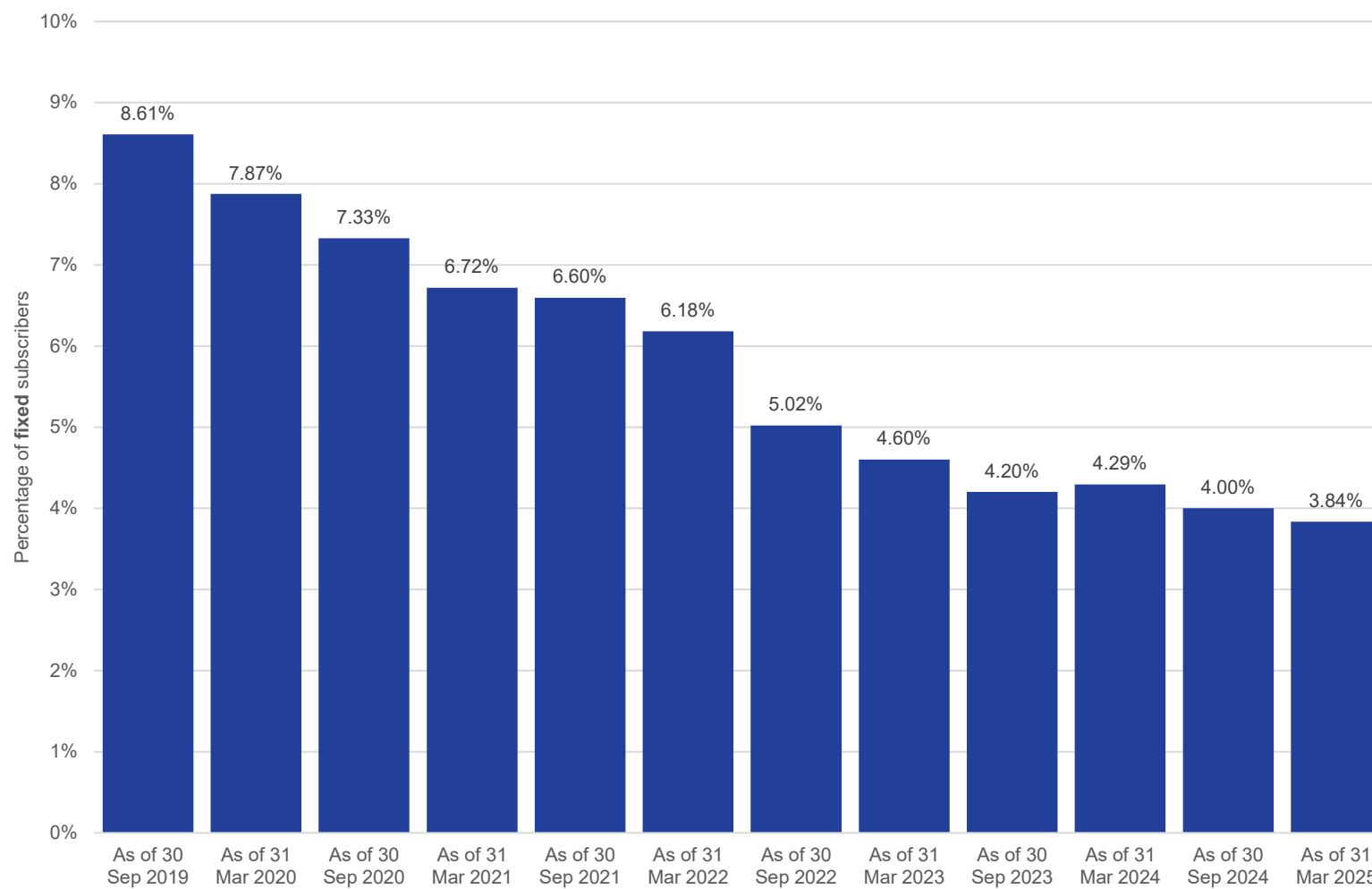
BEREC analyzed the average revenues from regulated and alternative tariffs for intra-EU communications, covering fixed voice, mobile voice, and SMS services. In fixed networks, the average revenue per minute from regulated intra-EU calls remained stable at EUR 0.04 per minute in both Q2 – Q3 2024 and Q4 2024 – Q1 2025 (Figure 21). Alternative tariffs for fixed international calls showed a slight decrease, from EUR 0.05 per minute to EUR 0.04 per minute (Figure 25). Both values remain well below the regulated price cap of EUR 0.19 per minute, with only a limited number of operators offering such alternative plans. In mobile networks, the average revenue from regulated intra-EU calls remained the same in both periods – EUR 0.06 per minute (Figure 23). Regarding SMS services, the average revenue from regulated intra-EU SMS remained stable at EUR 0.04 per SMS in both periods, with a slight increase in the second period (Figure 29). Alternative SMS tariffs generated revenues decreasing from EUR 0.03 per SMS to EUR 0.02 per SMS (Figure 30), although these values are based on a smaller subset of countries.

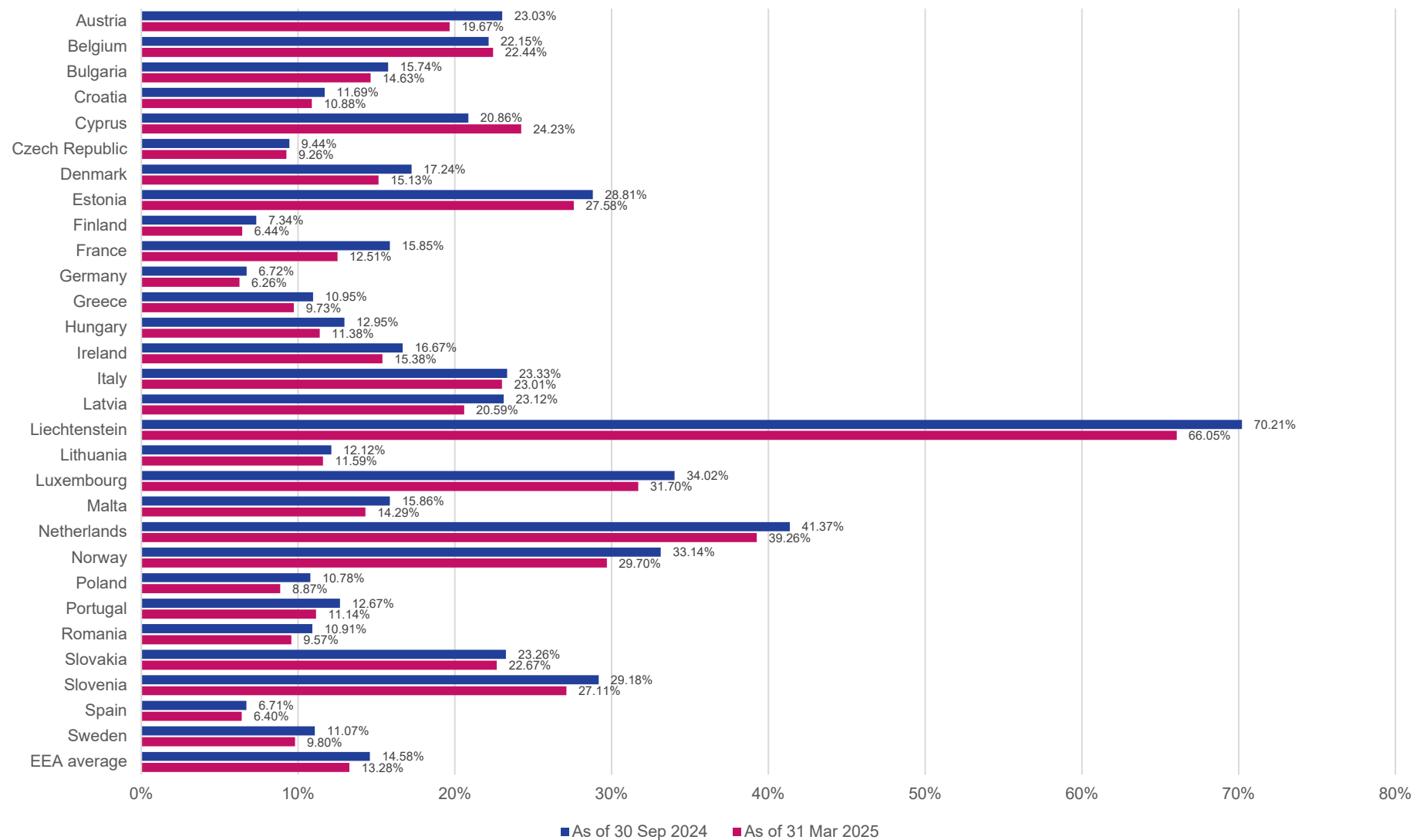


## **5. Charts**

## **5.1. Analysis of fixed and mobile subscribers**

**Figure 1: Percentage of fixed subscribers that used intra-EU communications with regulated prices**

**Figure 2:** EEA average: percentage of fixed subscribers that used intra-EU communications with regulated prices

**Figure 3:** Percentage of active mobile subscribers that used intra-EU communications with regulated prices

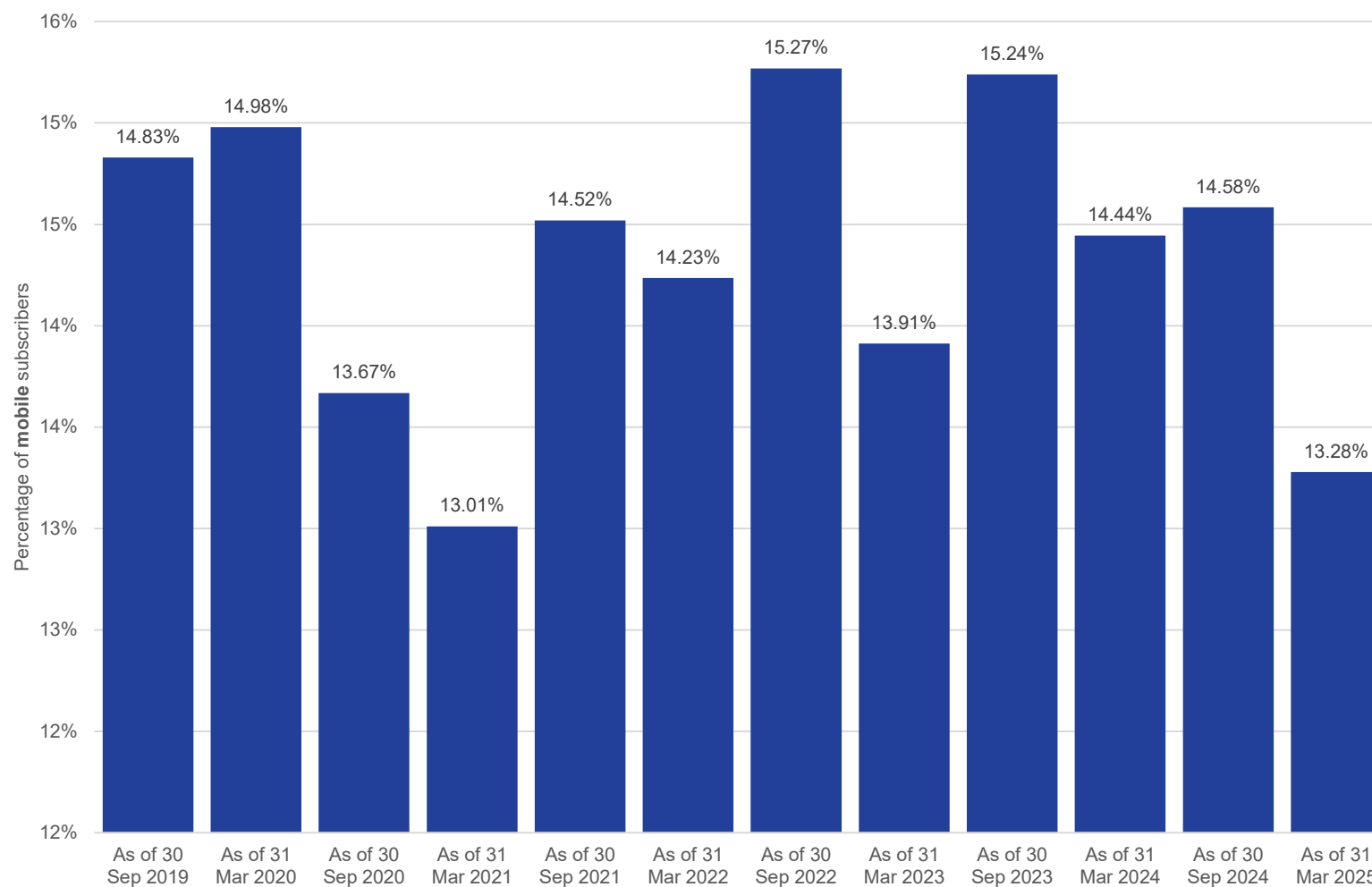
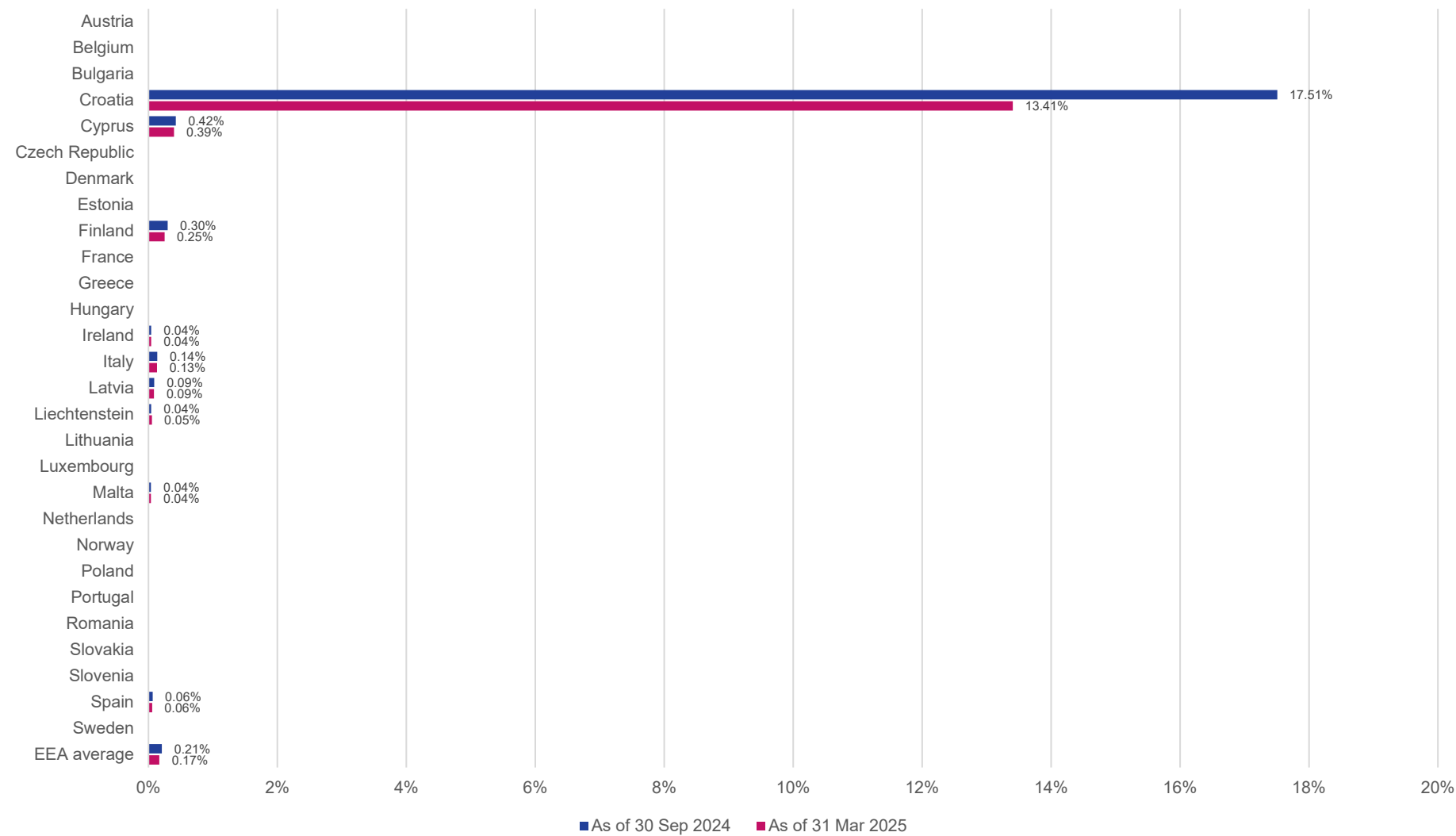
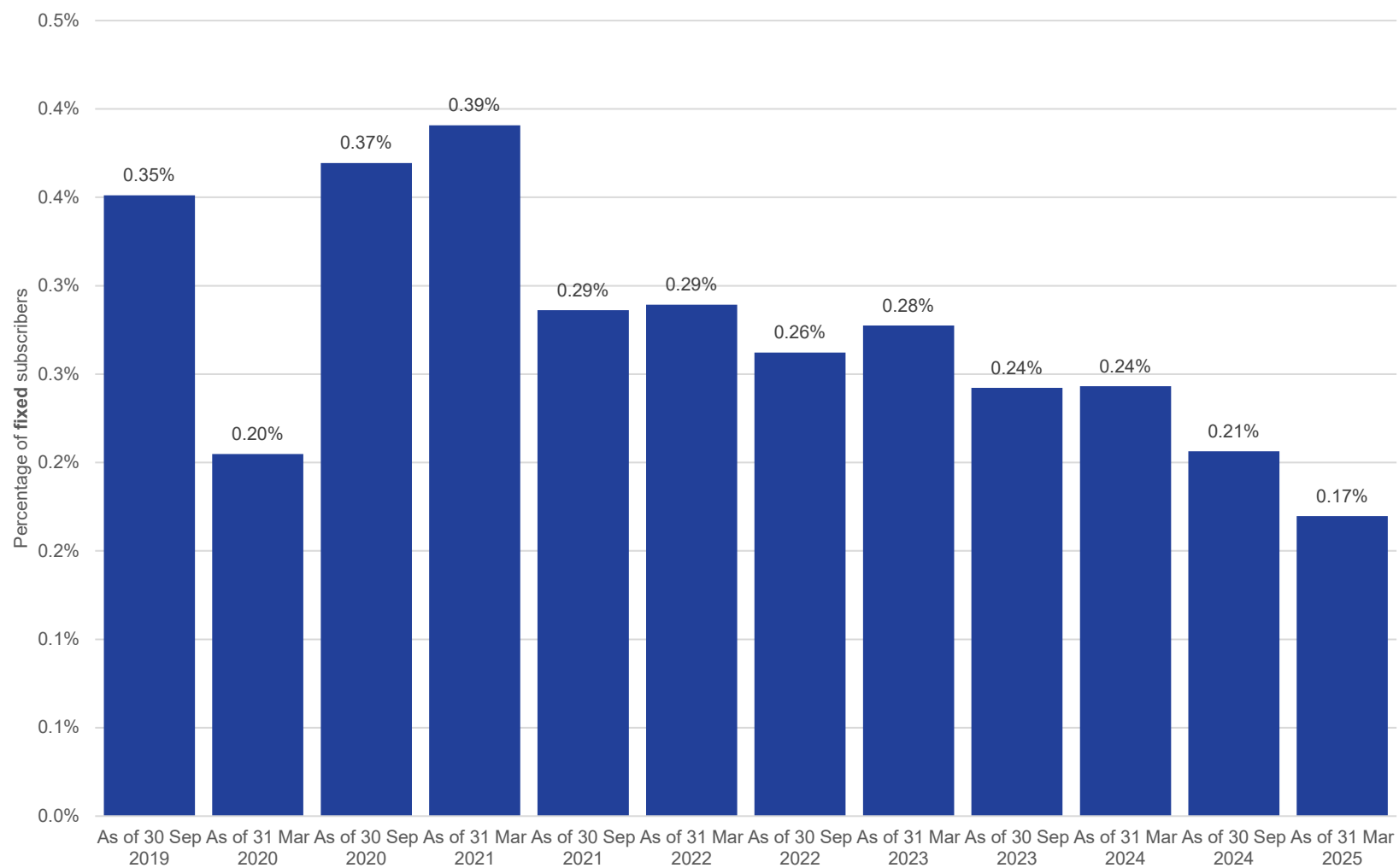
**Figure 4:** EEA average: percentage of active mobile subscribers that used intra-EU communications with regulated prices

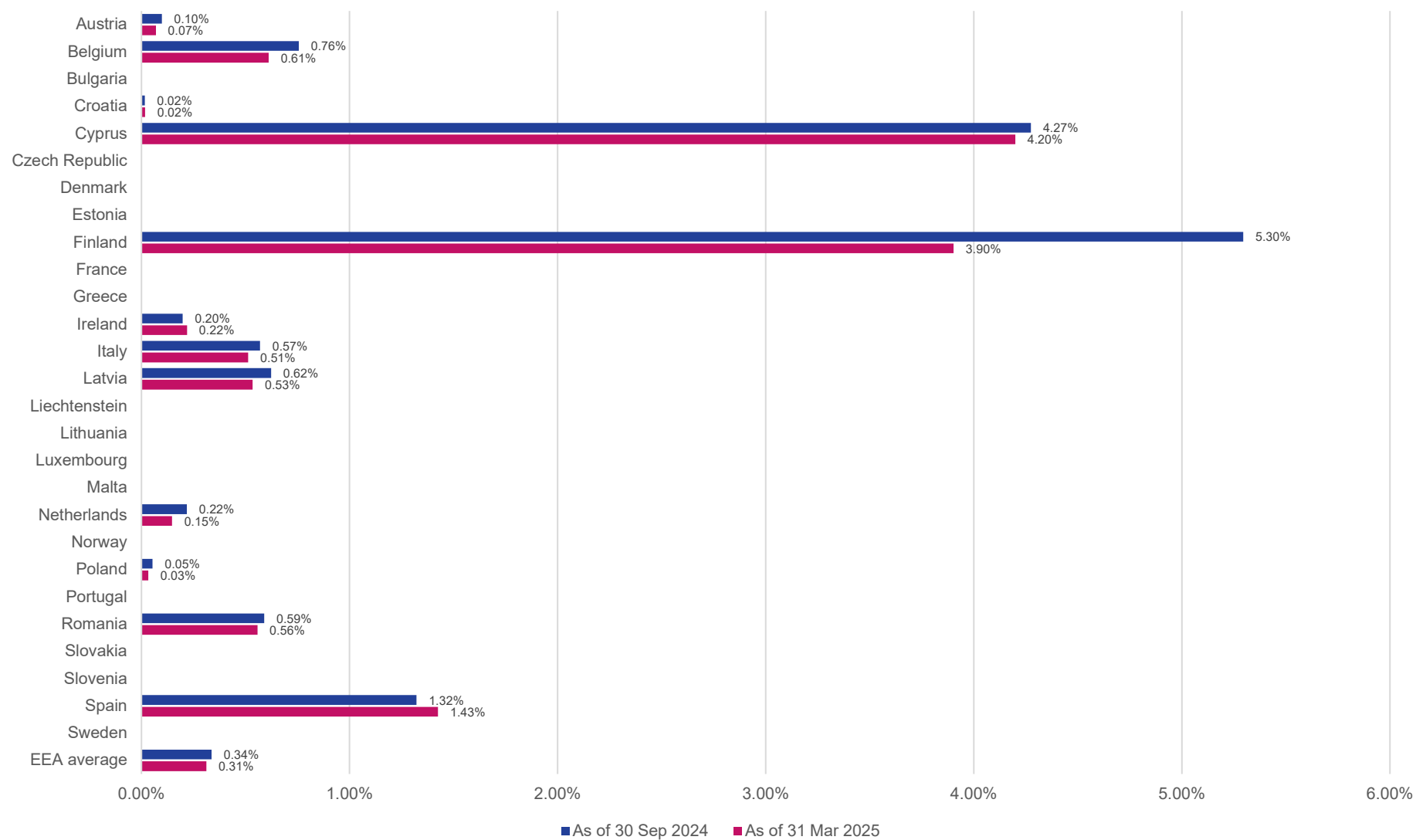
Figure 5: Percentage of fixed subscribers that used intra-EU communications with alternative tariffs



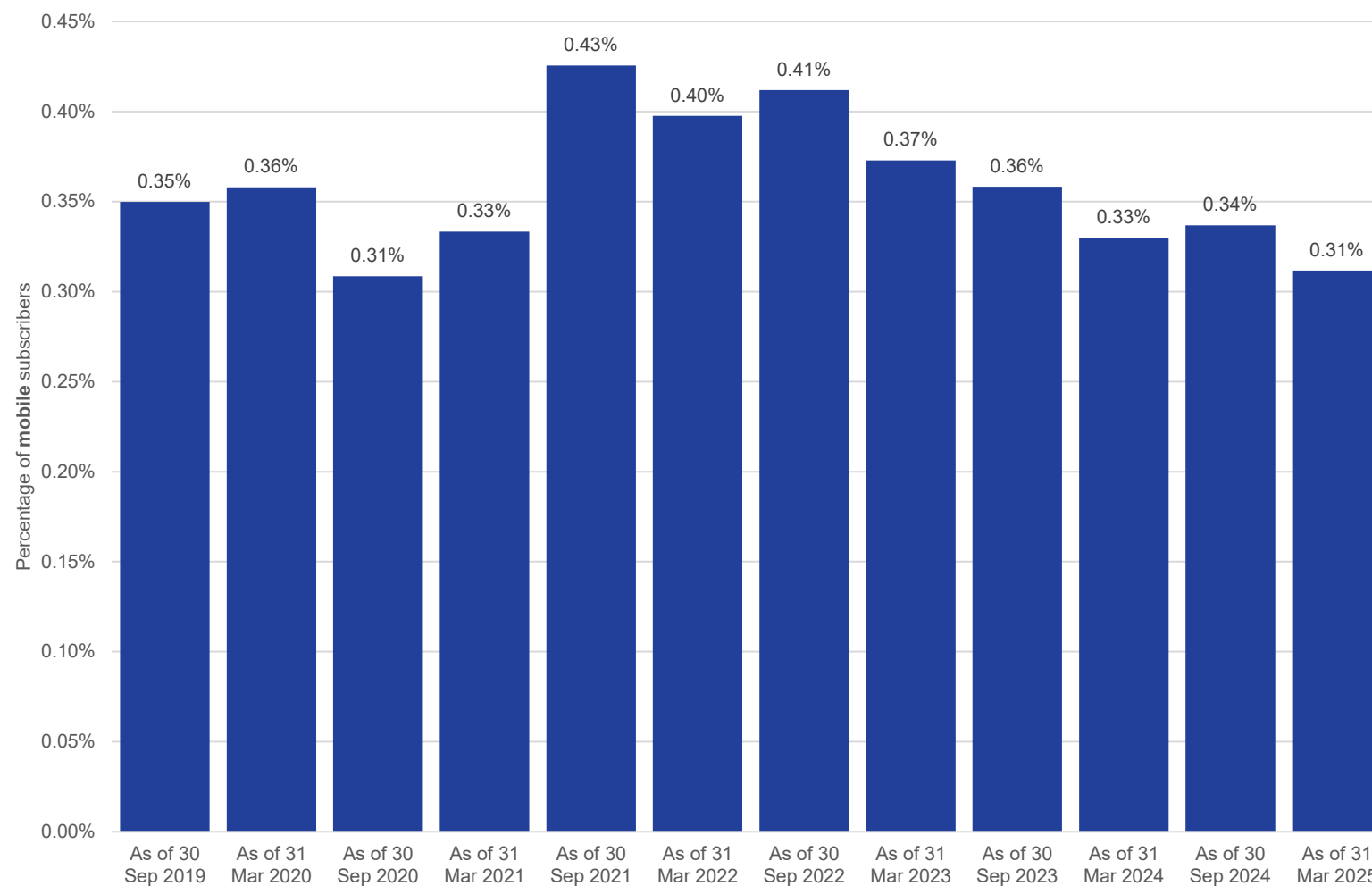
Note: Germany confidential.

**Figure 6:** EEA average: percentage of fixed subscribers that used intra-EU communications with alternative tariffs



**Figure 7:** Percentage of active mobile subscribers that used intra-EU communications with alternative tariffs

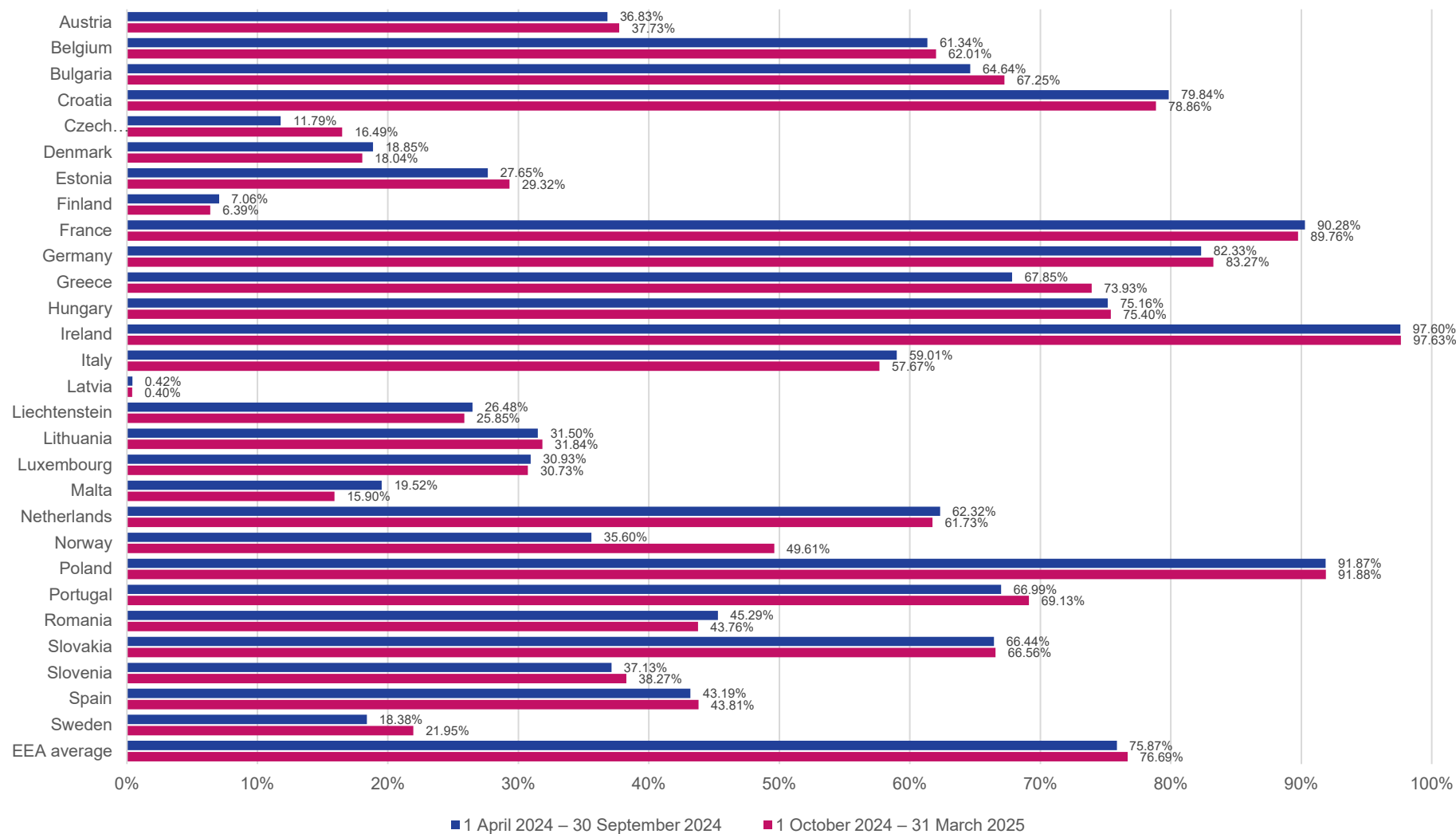
*Note:* Germany, Hungary confidential.

**Figure 8:** EEA average: percentage of active mobile subscribers that used intra-EU communications with alternative tariffs

## **5.2. Volumes of Intra-EU communications services**

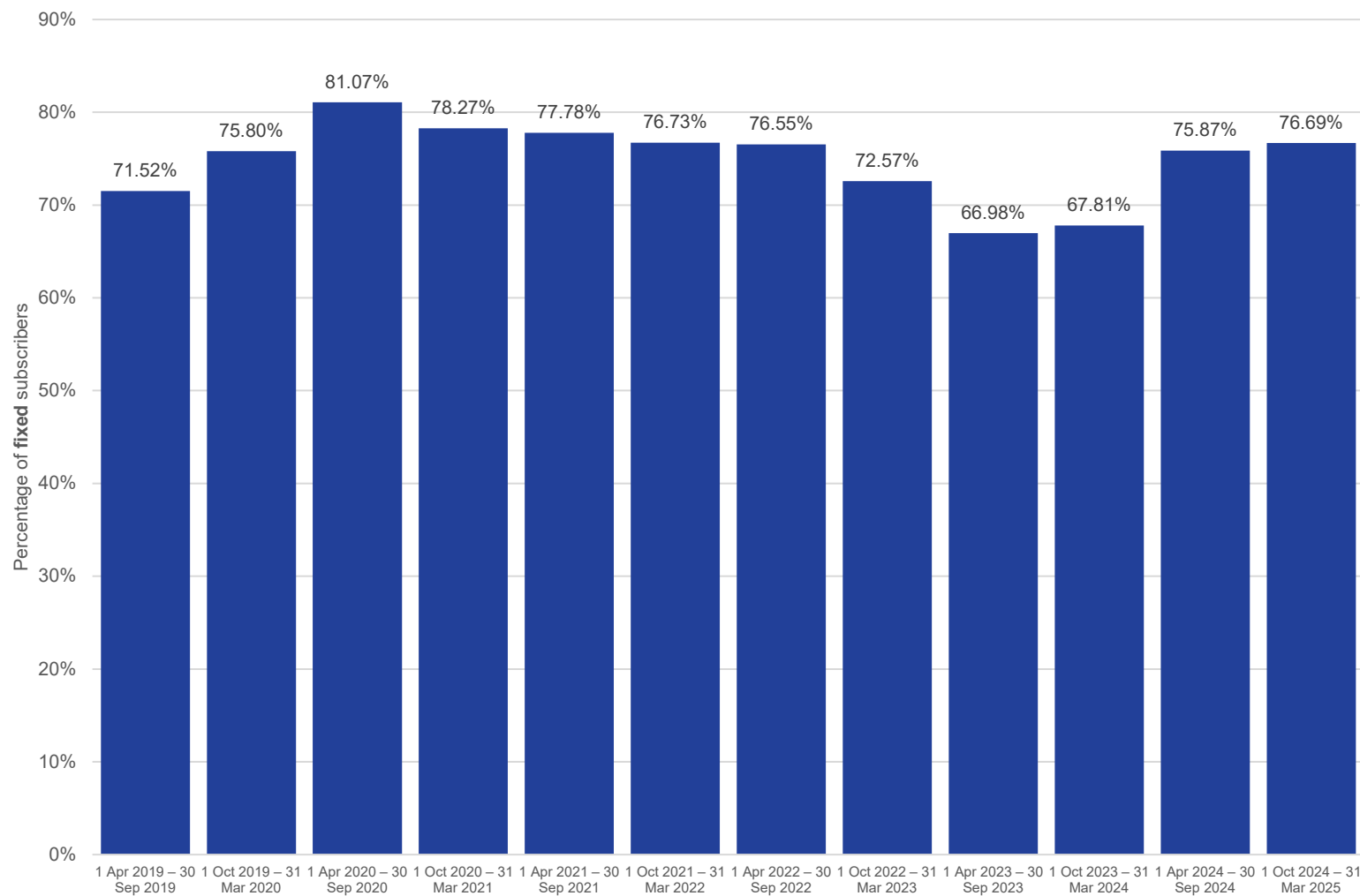
### **5.2.1. Volumes of fixed and mobile voices**

**Figure 9:** Fixed intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent



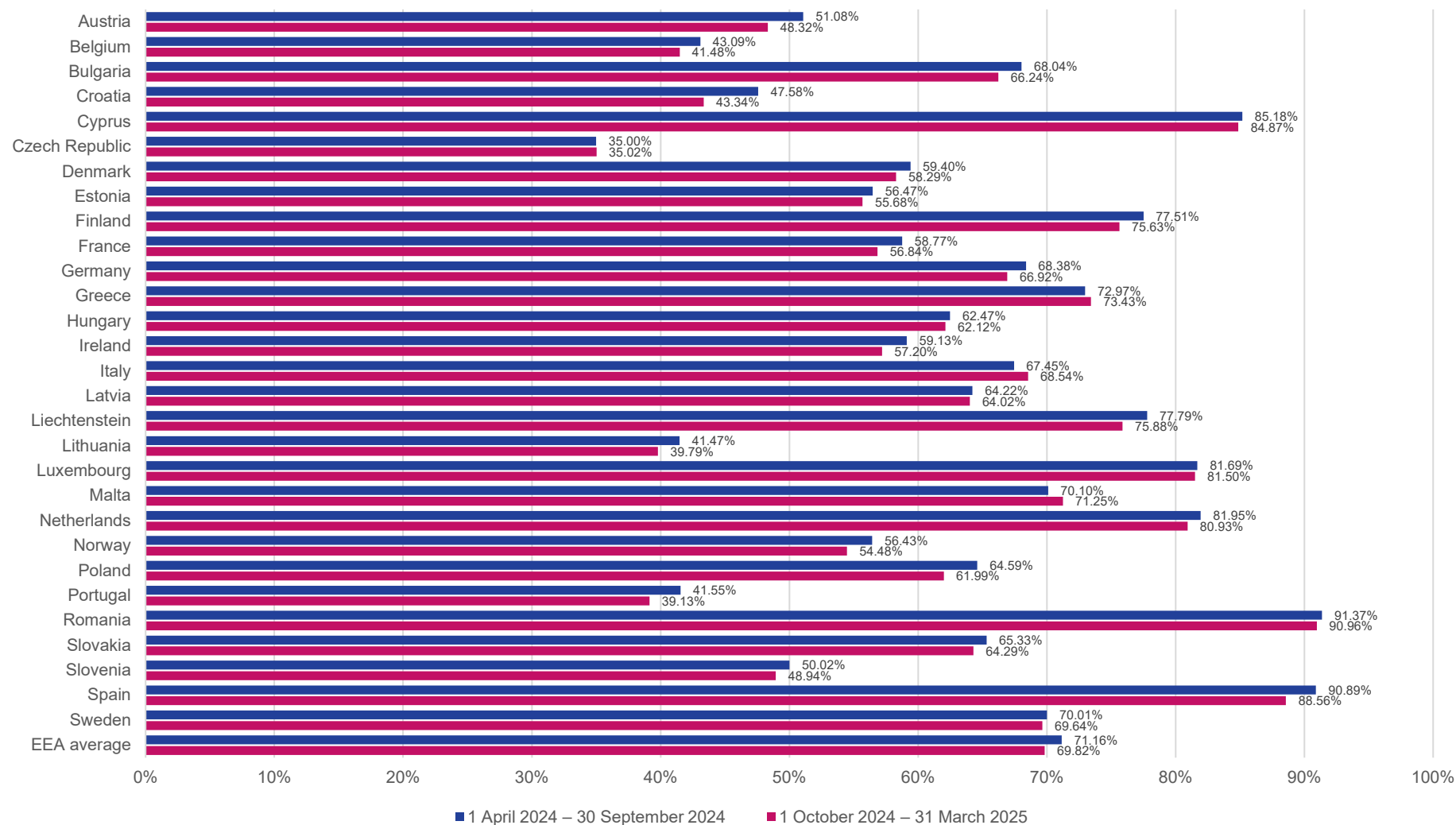
Note: Cyprus omitted.

**Figure 10:** EEA average: fixed intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent

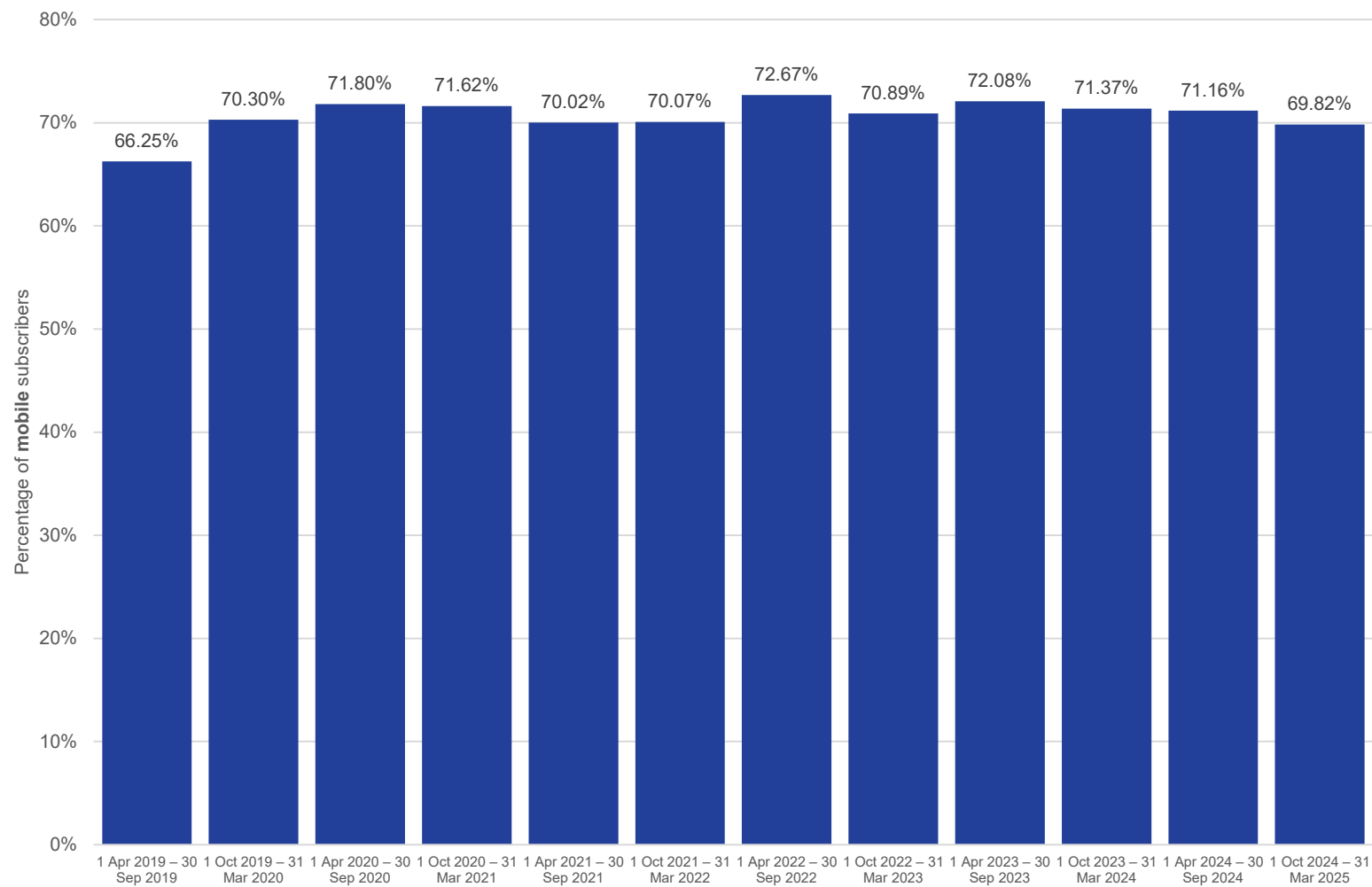


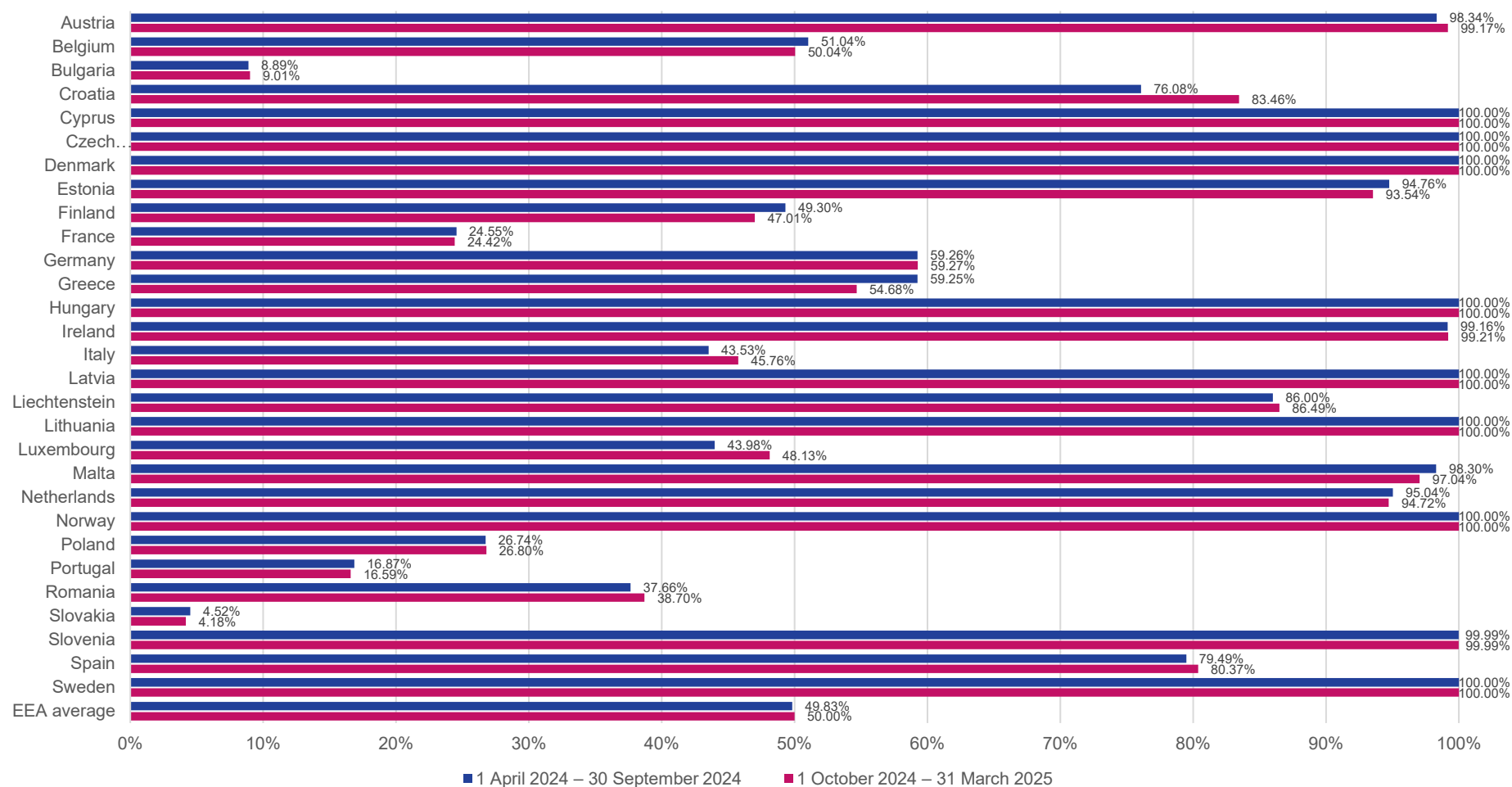
Note: Cyprus omitted.

**Figure 11:** Mobile intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent

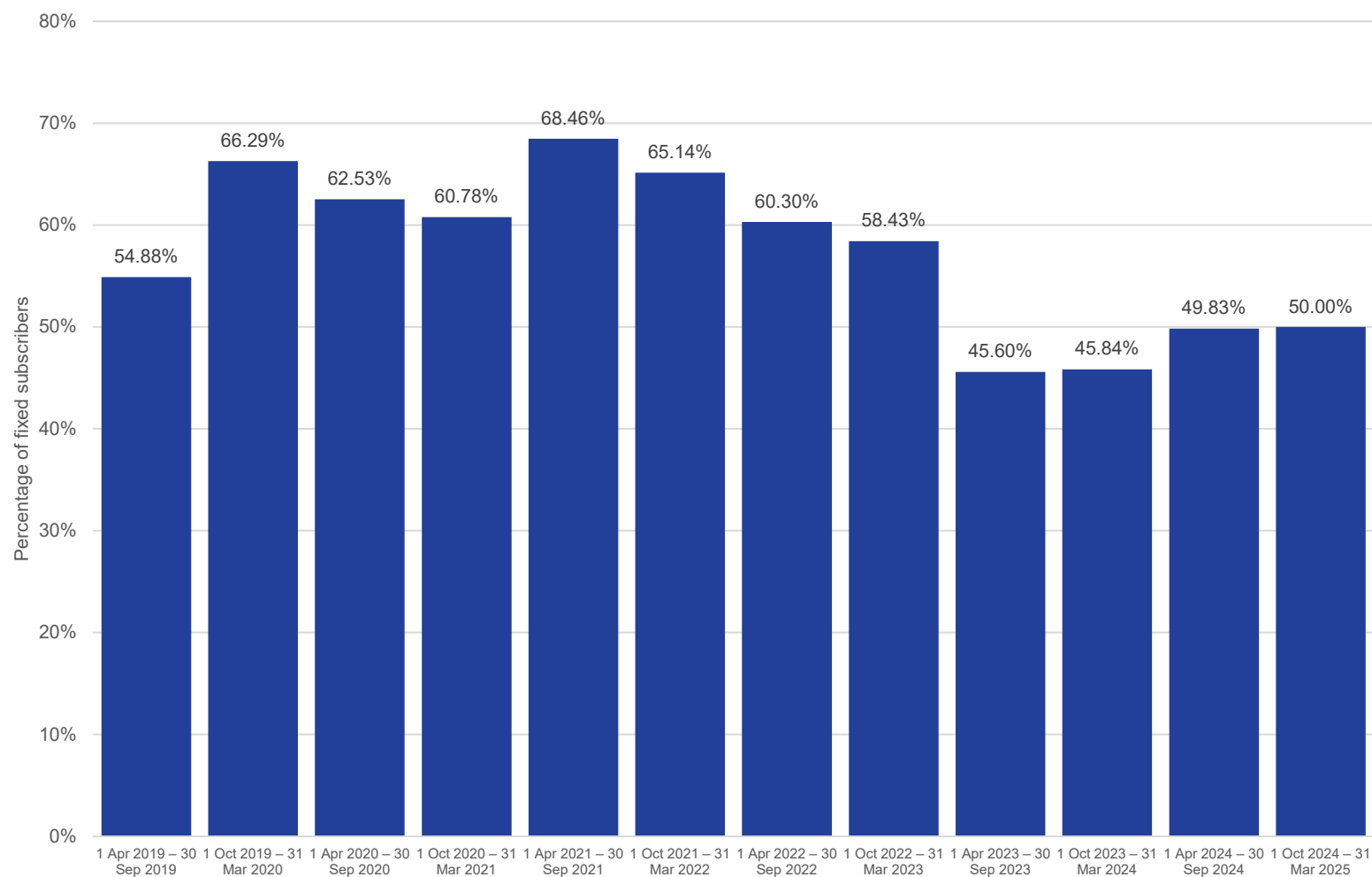


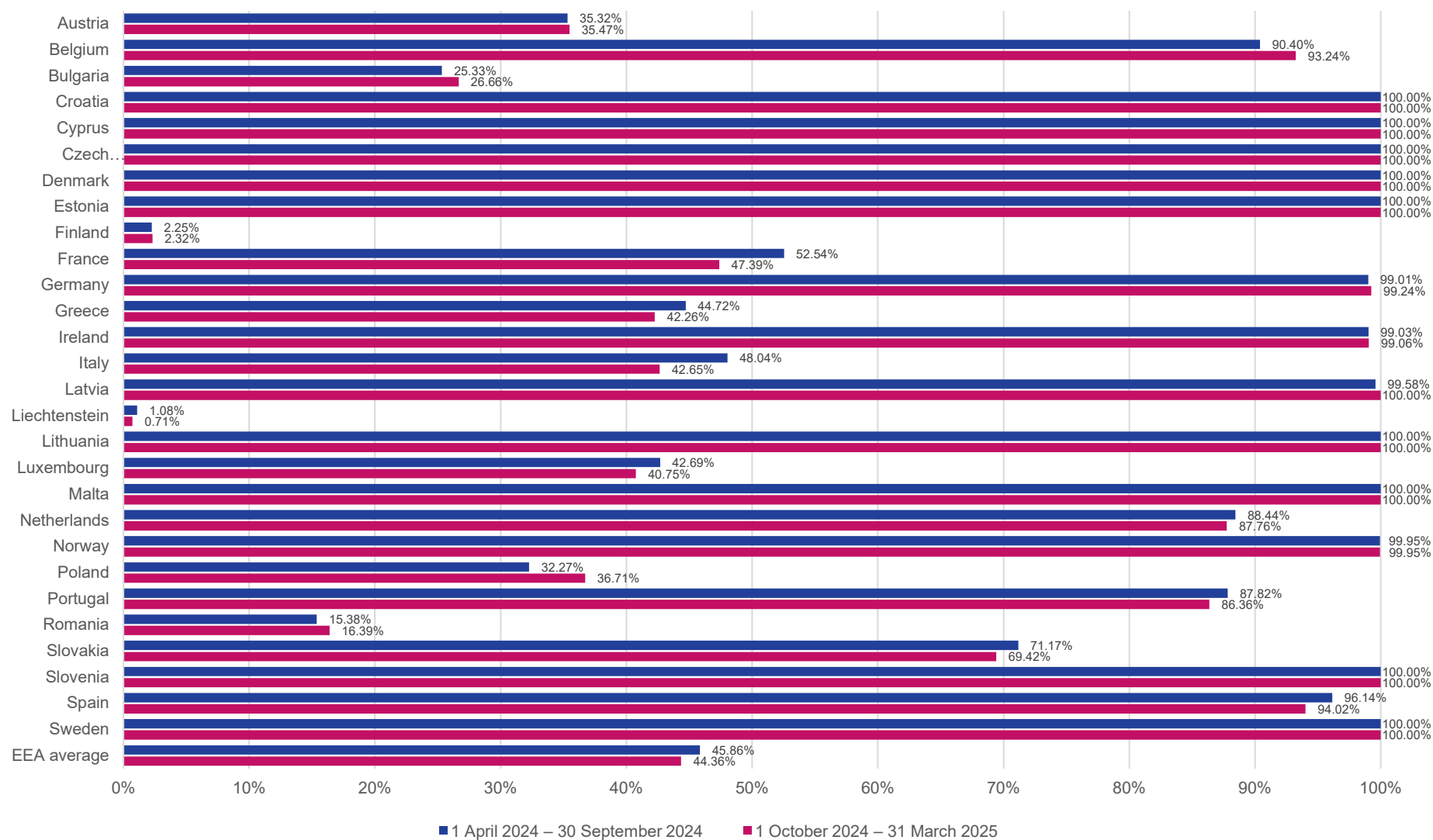
**Figure 12:** EEA average: Mobile intra-EU minutes originated by consumers compared to total intra-EU minutes originated by consumers and businesses, in percent



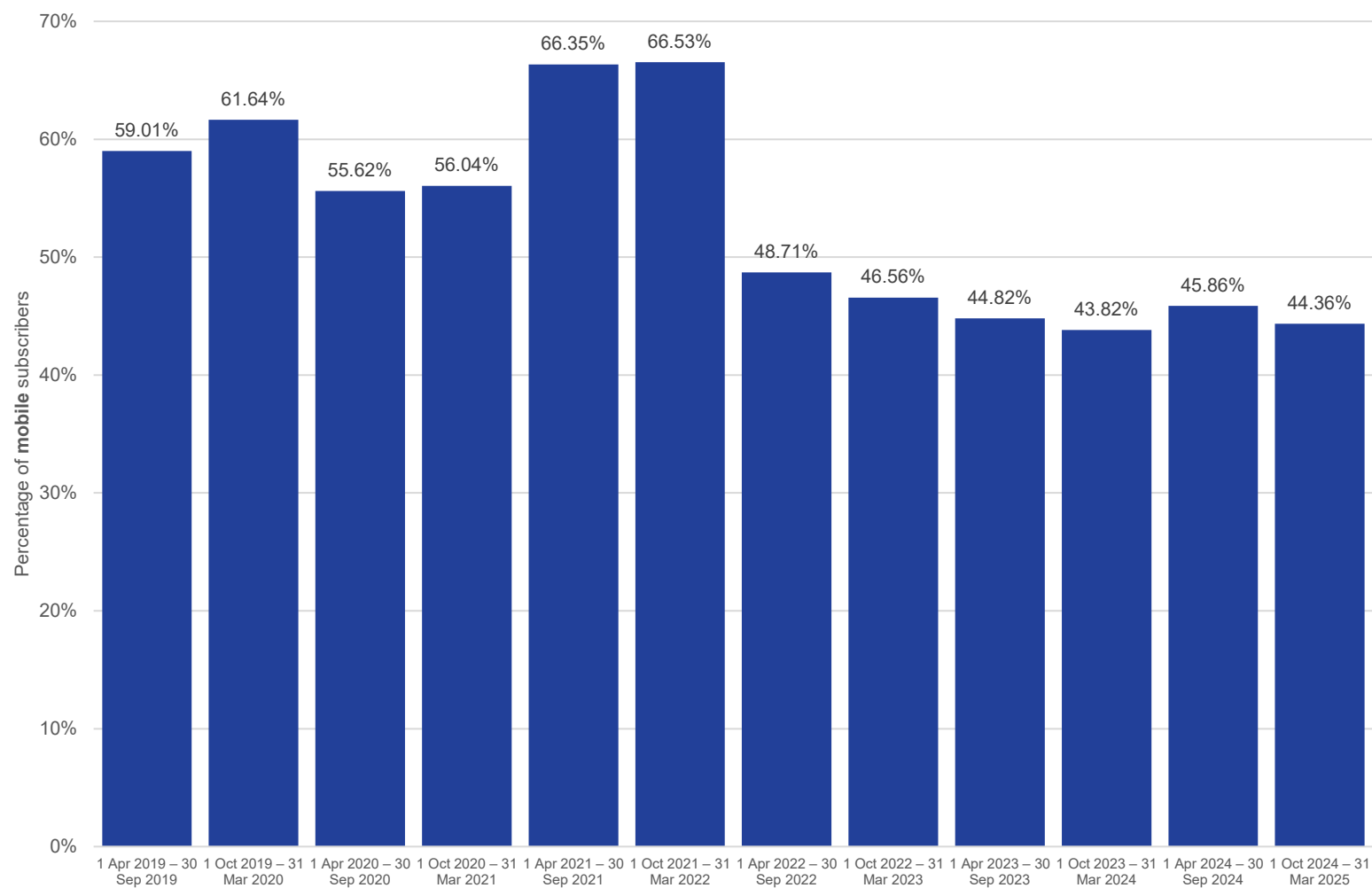
**Figure 13:** Percentage of fixed price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only)



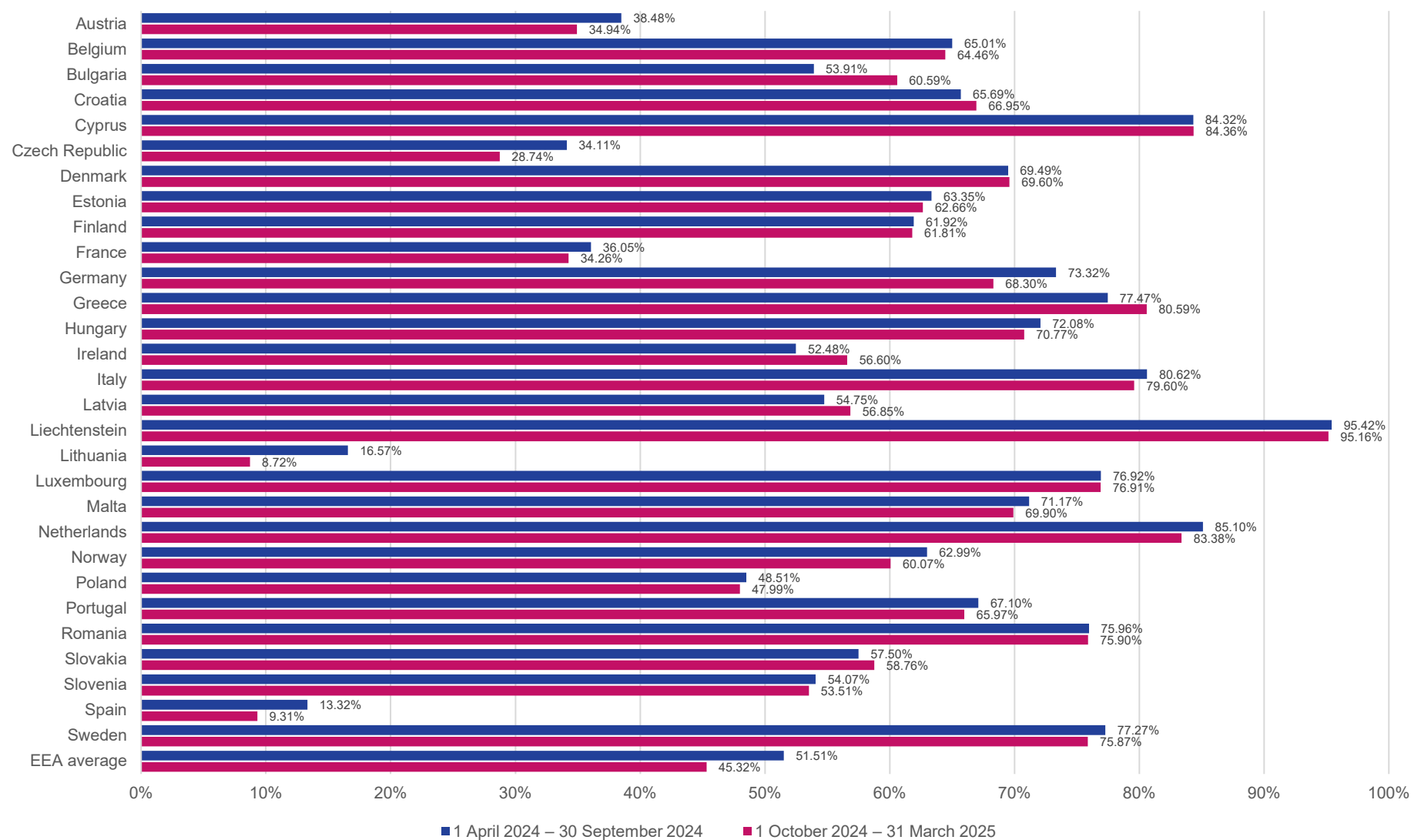
**Figure 14:** EEA average: percentage of fixed price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only)

**Figure 15:** Percentage of mobile price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only)

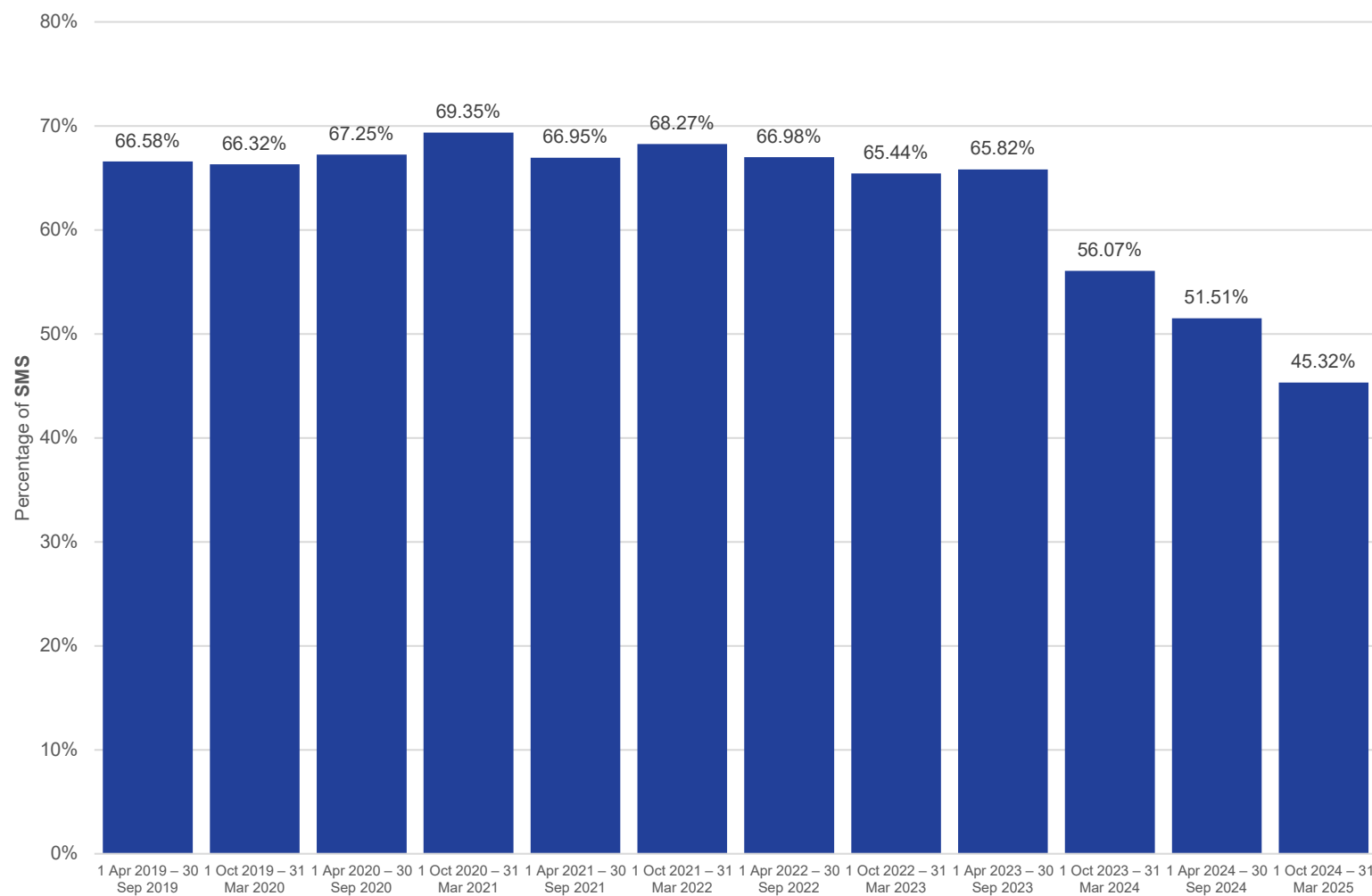
Note: Hungary confidential.

**Figure 16:** EEA average: percentage of mobile price regulated intra-EU minutes (vs) total intra-EU minutes (for consumers only)

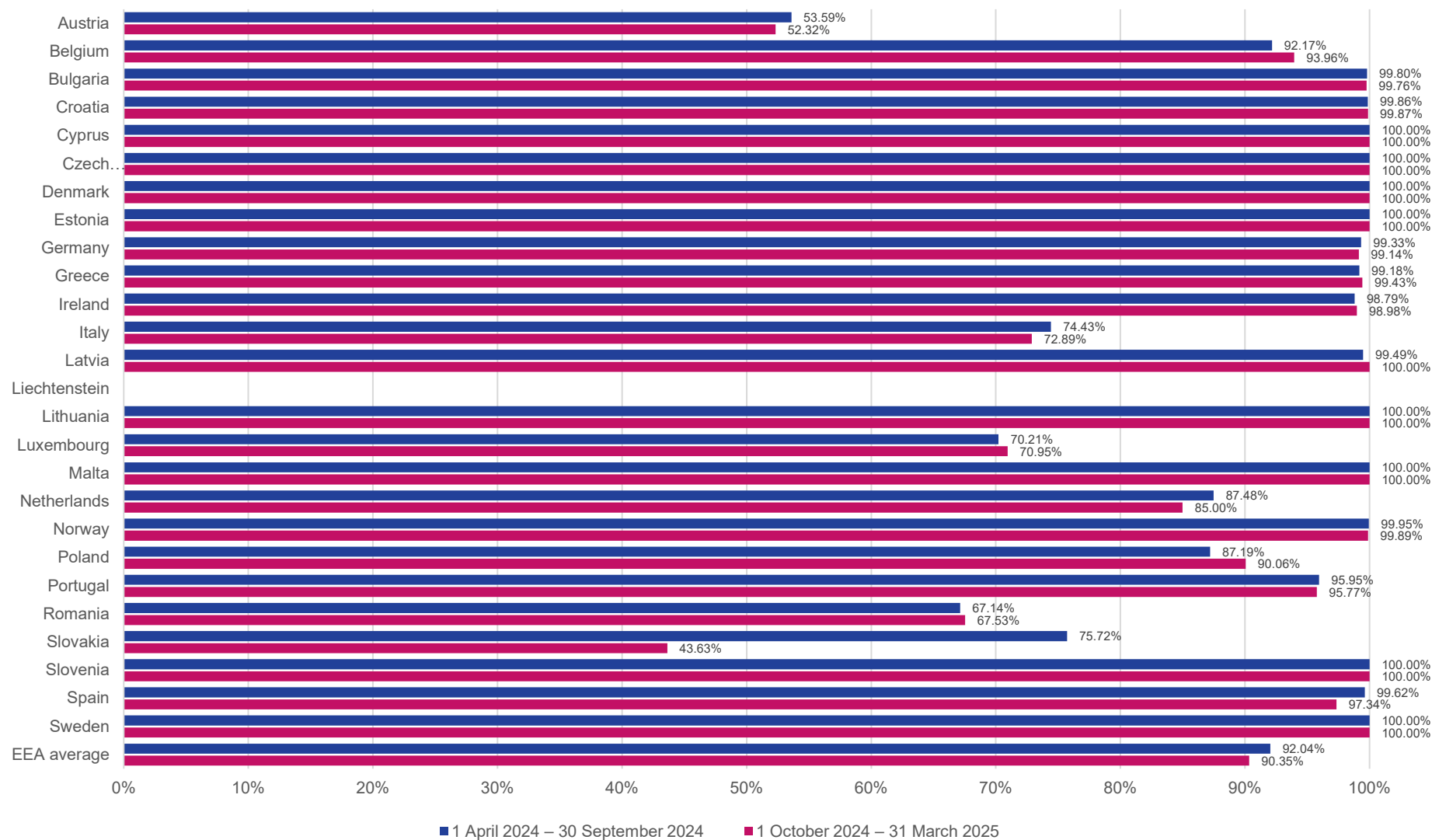
#### **5.2.2. Volumes of SMS**

**Figure 17:** Percentage of SMS sent by consumers from (vs) total originated intra-EU SMS (consumers and business)

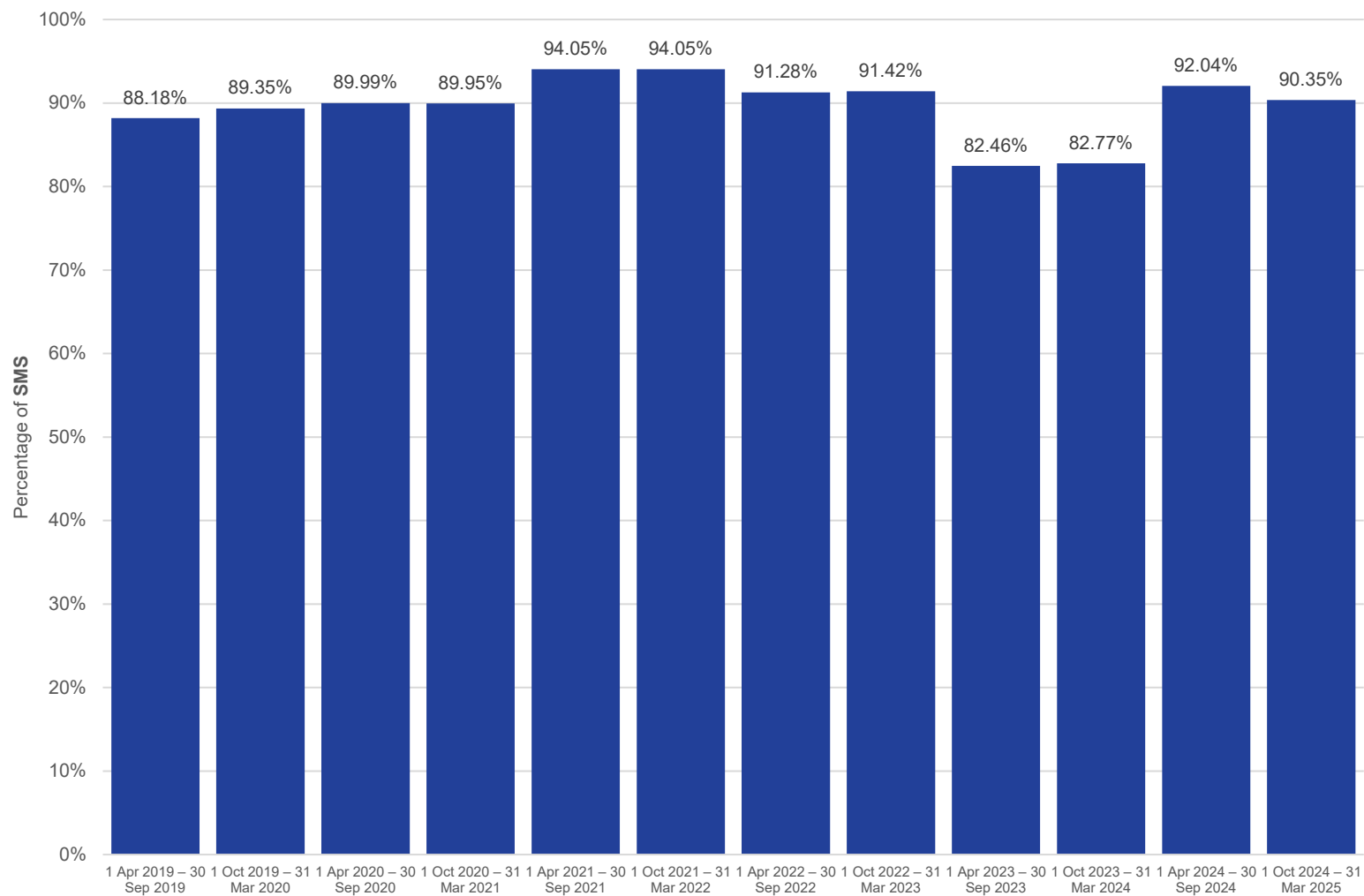
Note: Finland omitted.

**Figure 18:** EEA average: percentage of SMS sent by consumers from (vs) total originated intra-EU SMS (consumers and business)

*Note:* Finland omitted from last two periods.

**Figure 19:** Percentage of price regulated intra-EU communications (vs) total originated intra-EU SMS (consumers only)

Note: Hungary confidential. France, Finland omitted.

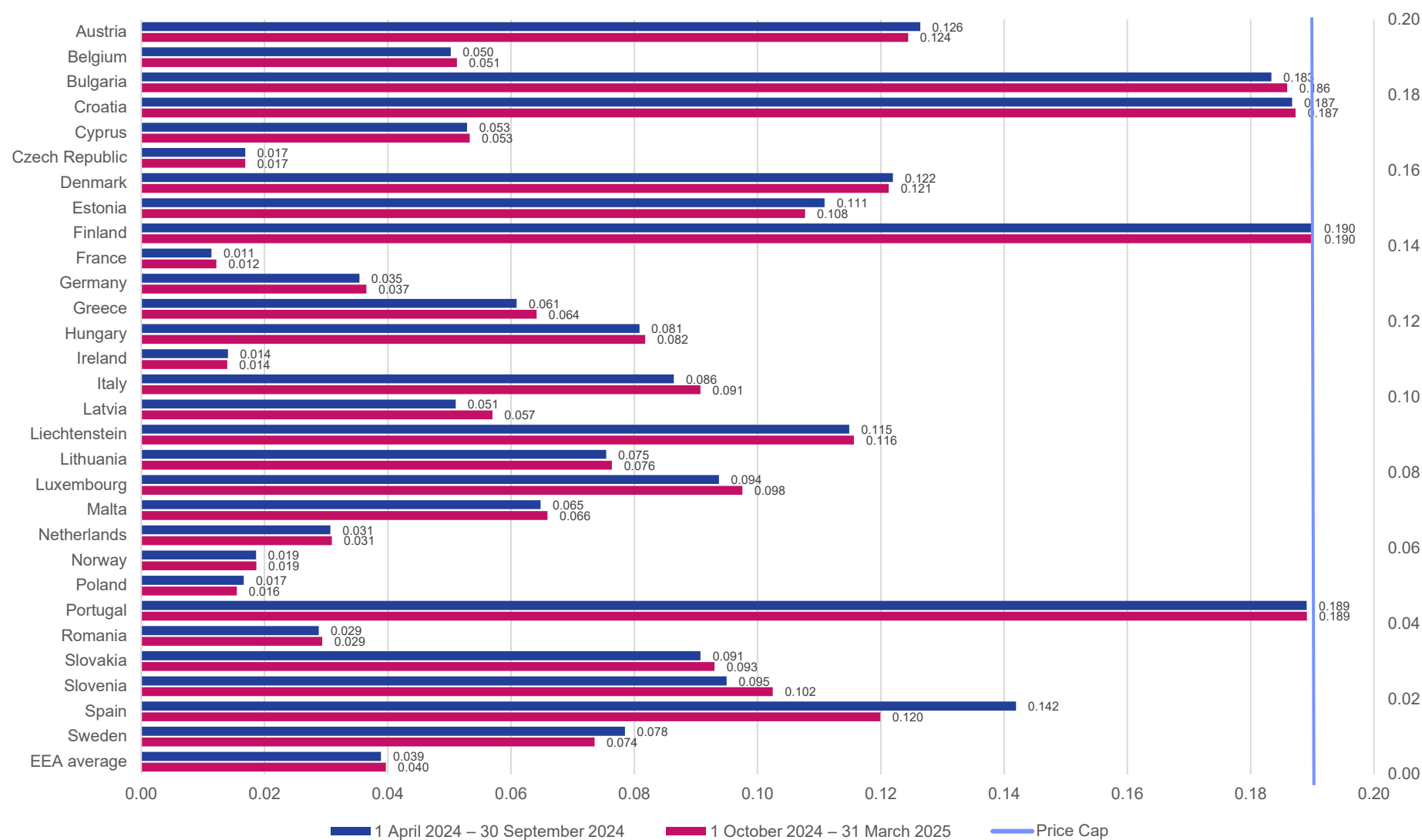
**Figure 20:** EEA average: percentage of price regulated intra-EU communications (vs) total originated intra-EU SMS (consumers only)

Note: France, Finland omitted from last two periods.

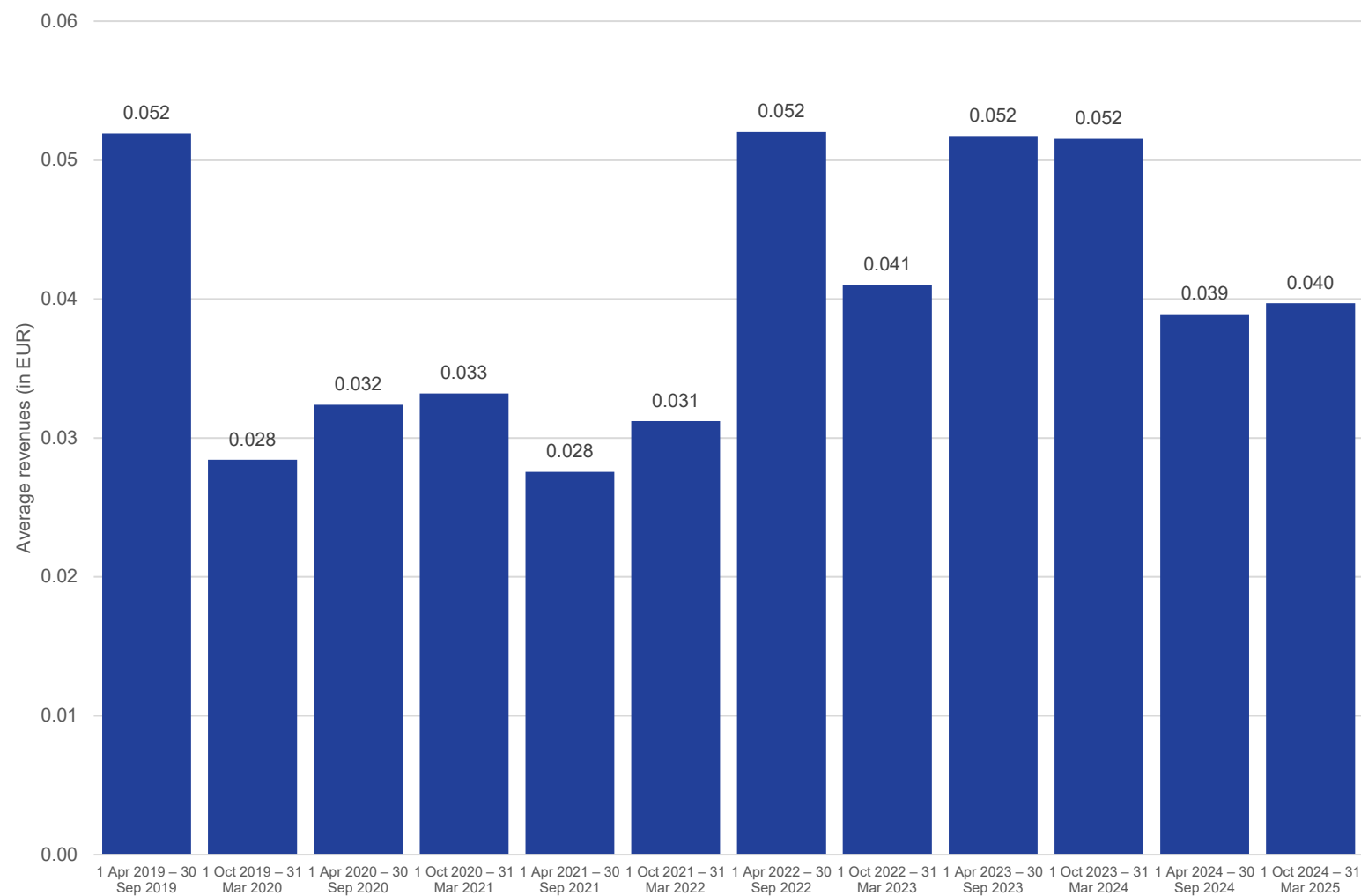


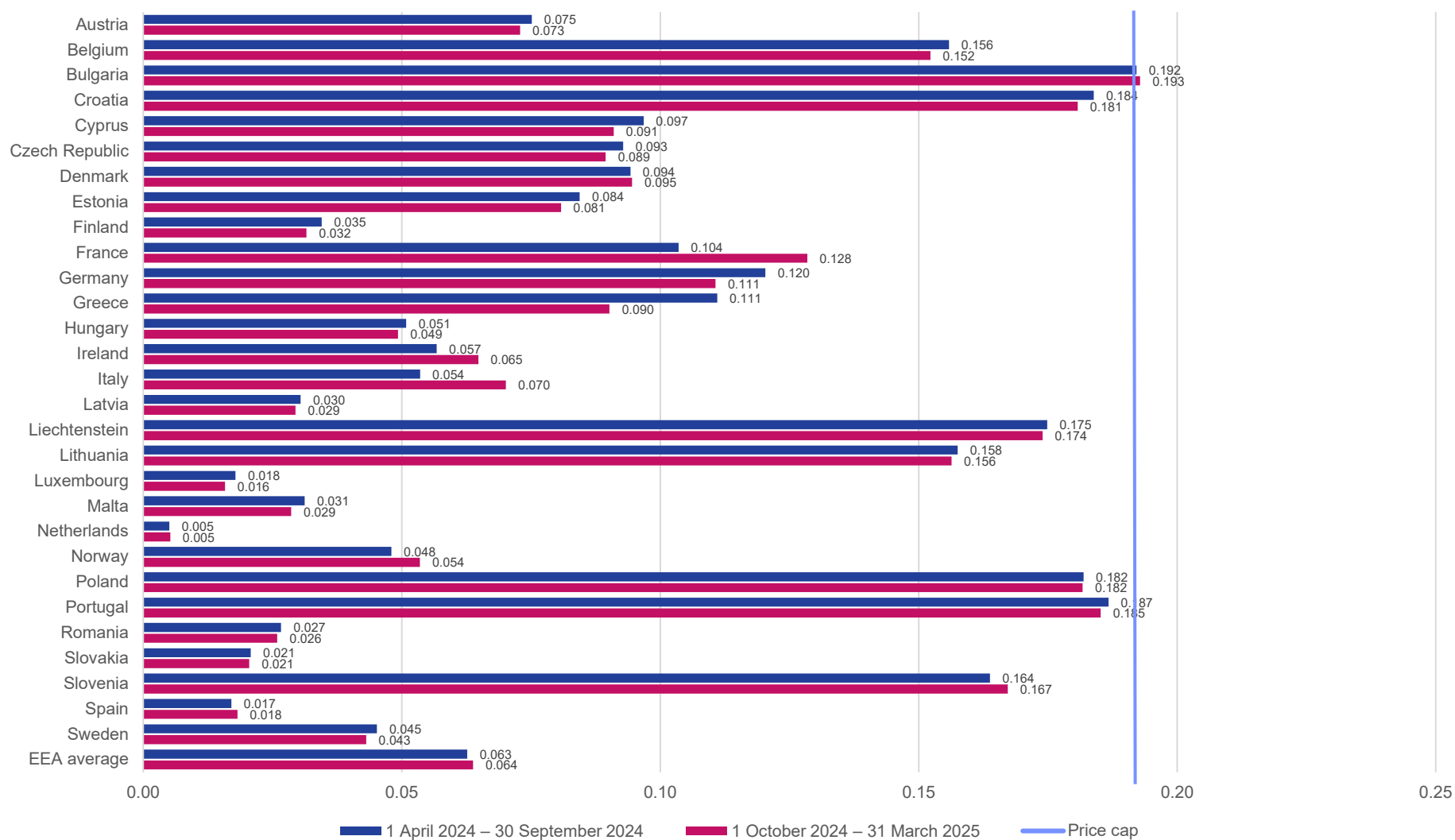
### **5.3. Revenues per unit of Intra-EU communication services**

#### **5.3.1. Revenues of fixed and mobile voices**

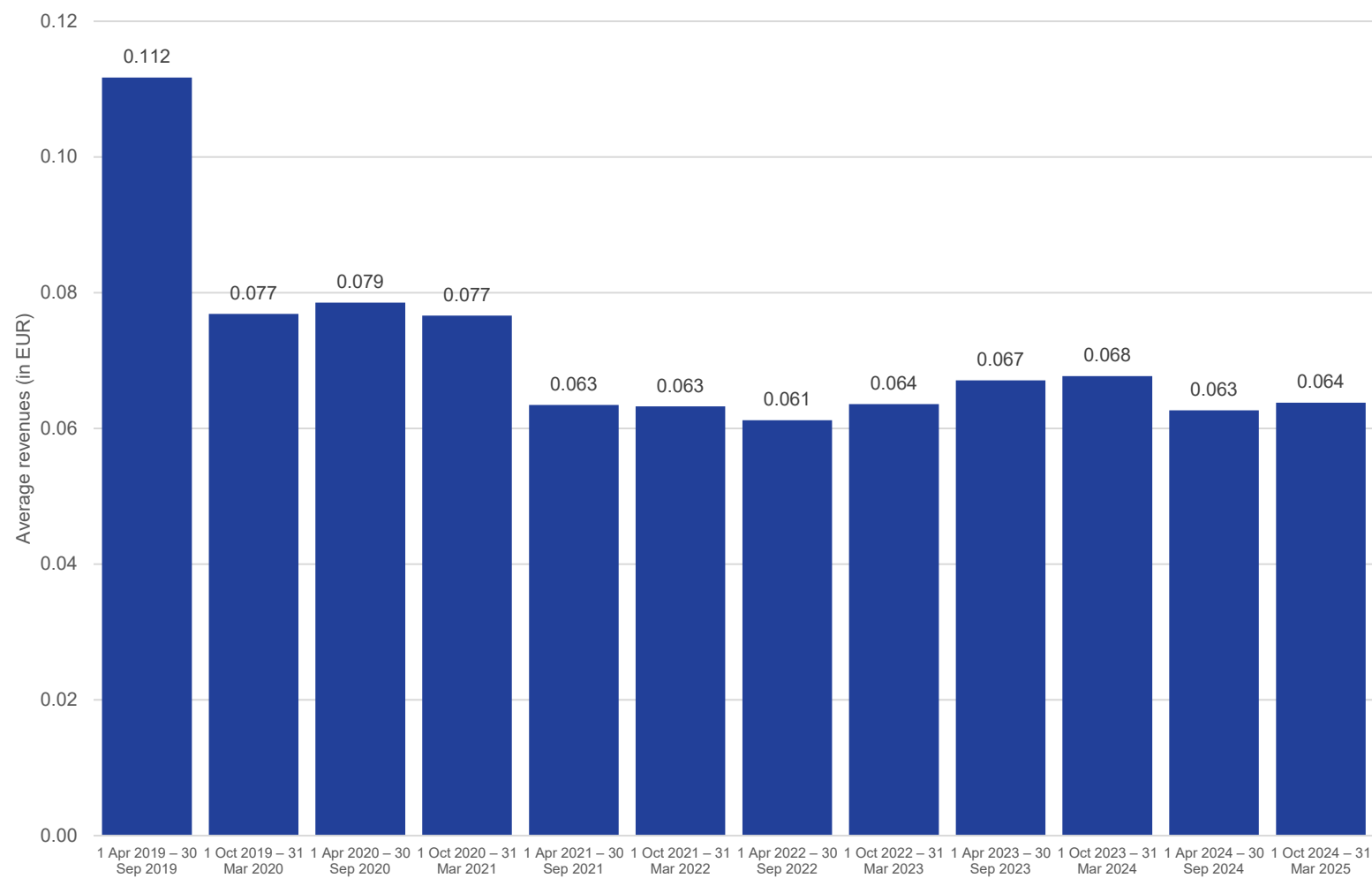
**Figure 21:** Revenues (in EUR) per fixed minute for price regulated intra-EU calls

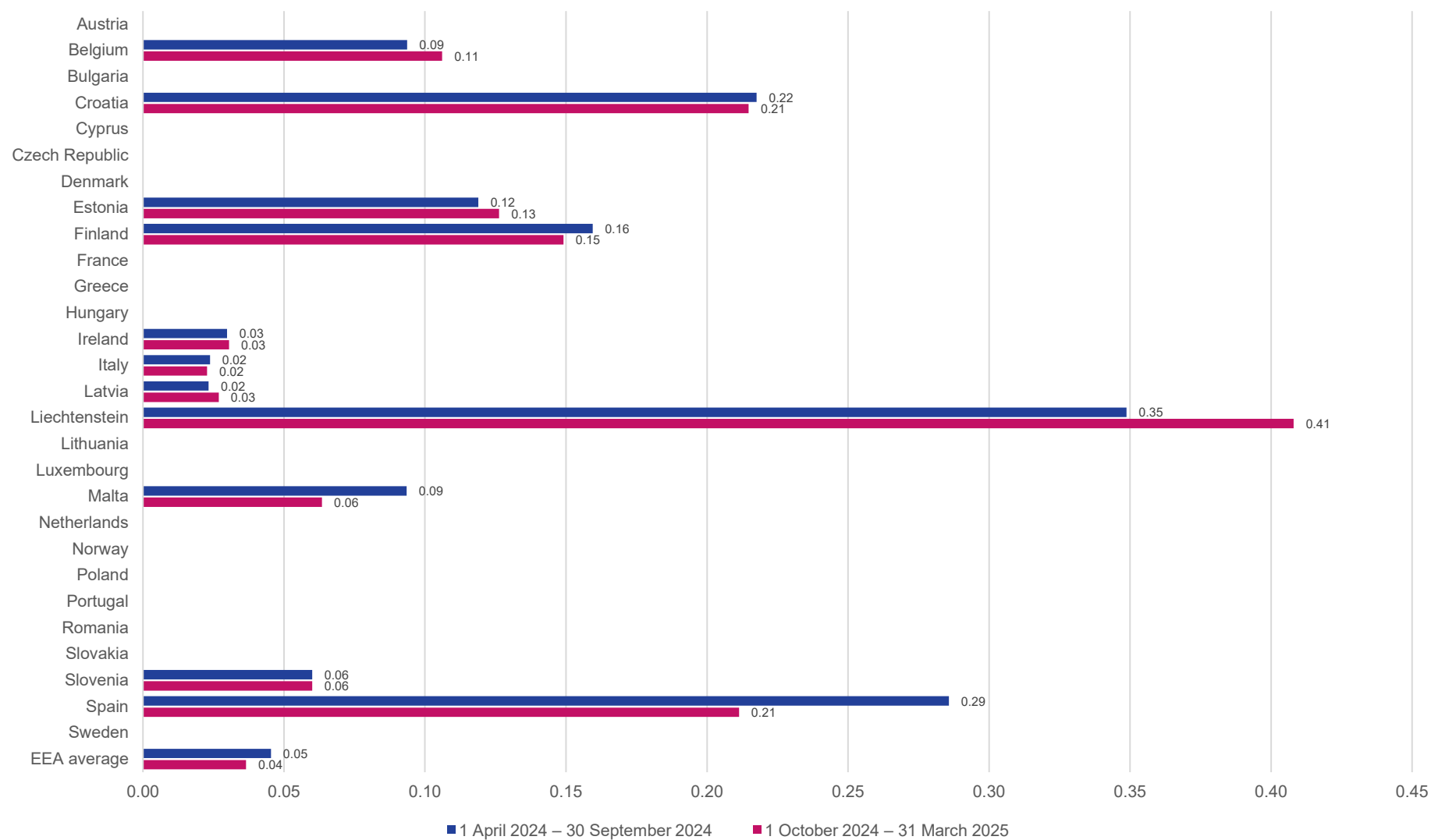
*Note:* Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption.

**Figure 22:** Evolution of EEA average revenues (in EUR) per fixed minute for price regulated intra-EU calls

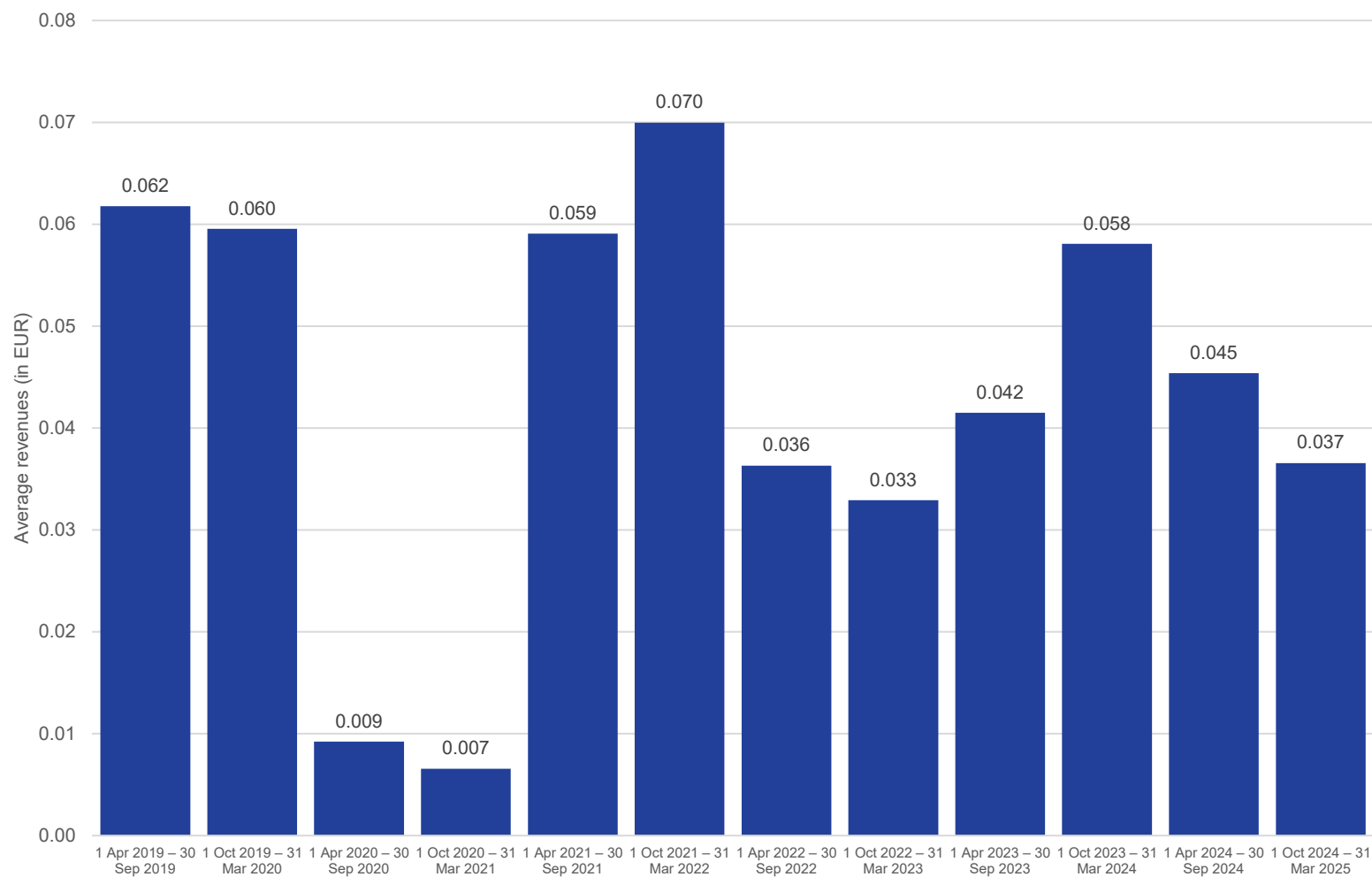
**Figure 23:** Revenues (in EUR) per mobile minute for price regulated intra-EU calls

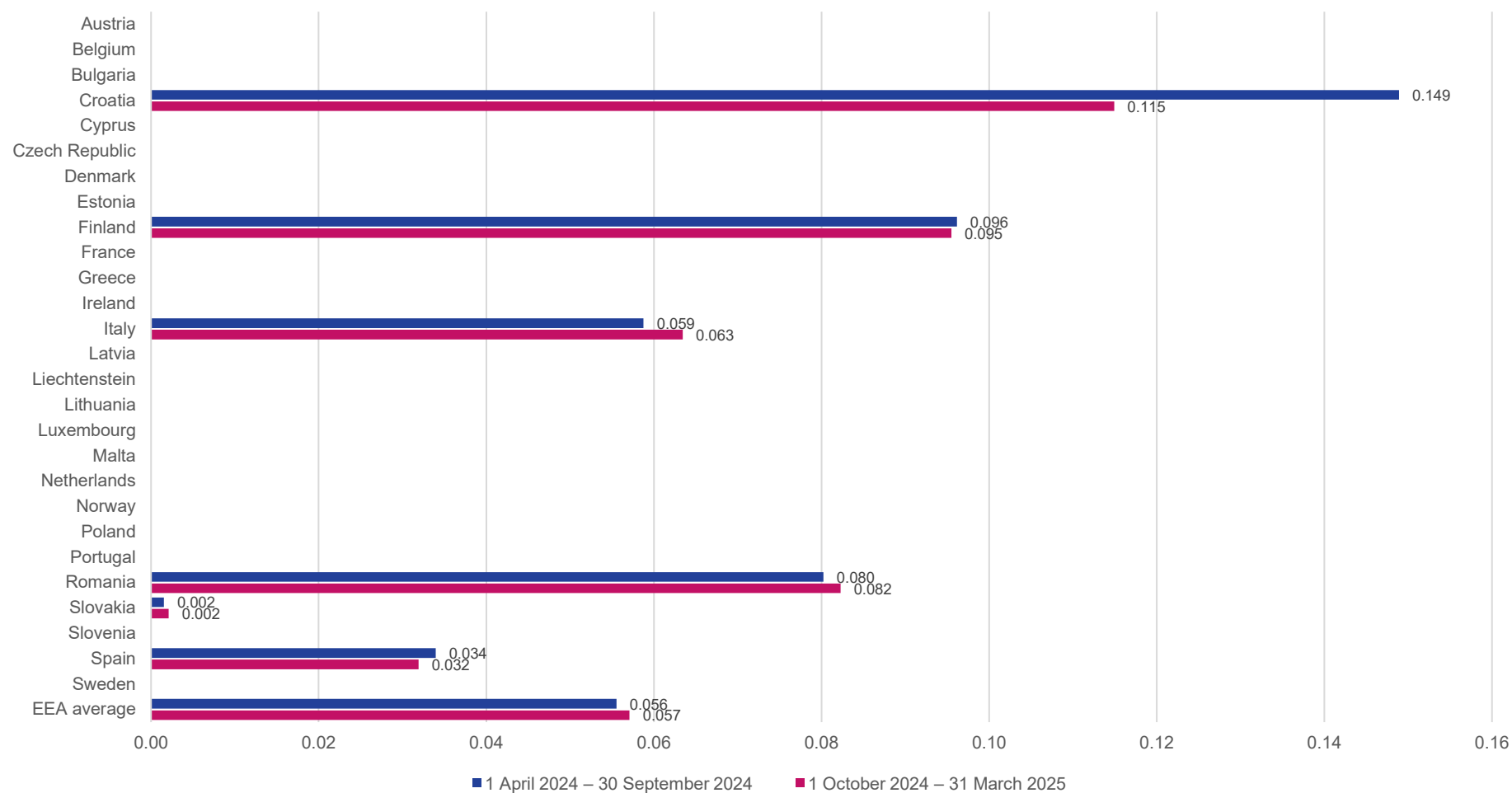
**Notes:** Regulated Intra-EU communications only refer to communications which are wholly or partly based on actual consumption. Price cap discrepancies happens due to different volumes of actual and billed minutes.

**Figure 24:** Evolution of EEA average revenues (in EUR) per mobile minute for price regulated intra-EU calls

**Figure 25:** Revenues (in EUR) per fixed minute for intra-EU calls from alternative tariffs

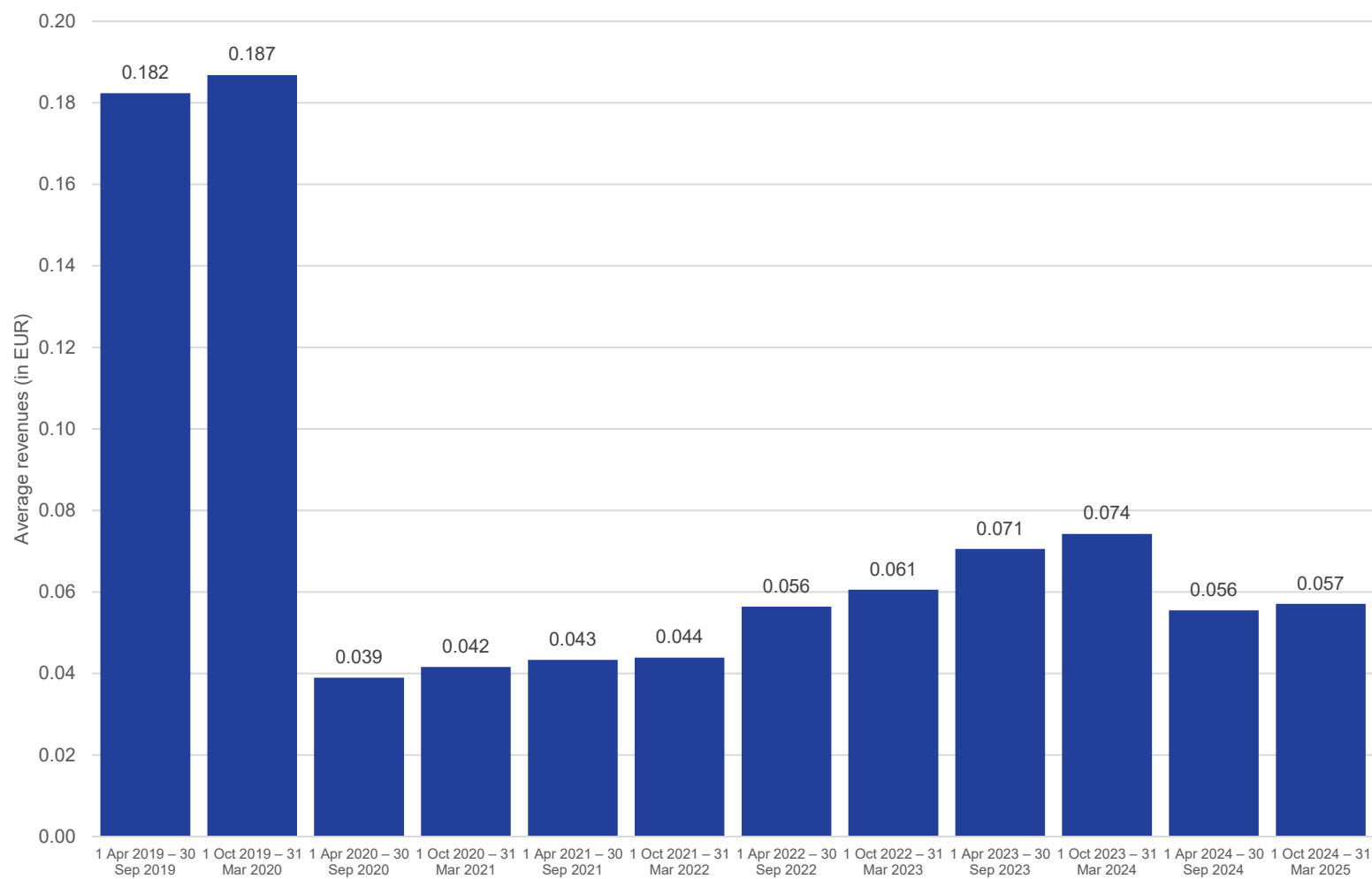
Notes: Only a few of the EU operators are offering alternative plans for fixed network regulated international communications. Germany confidential.

**Figure 26:** Evolution of EEA average revenues (in EUR) per fixed minute for intra-EU calls from alternative tariffs

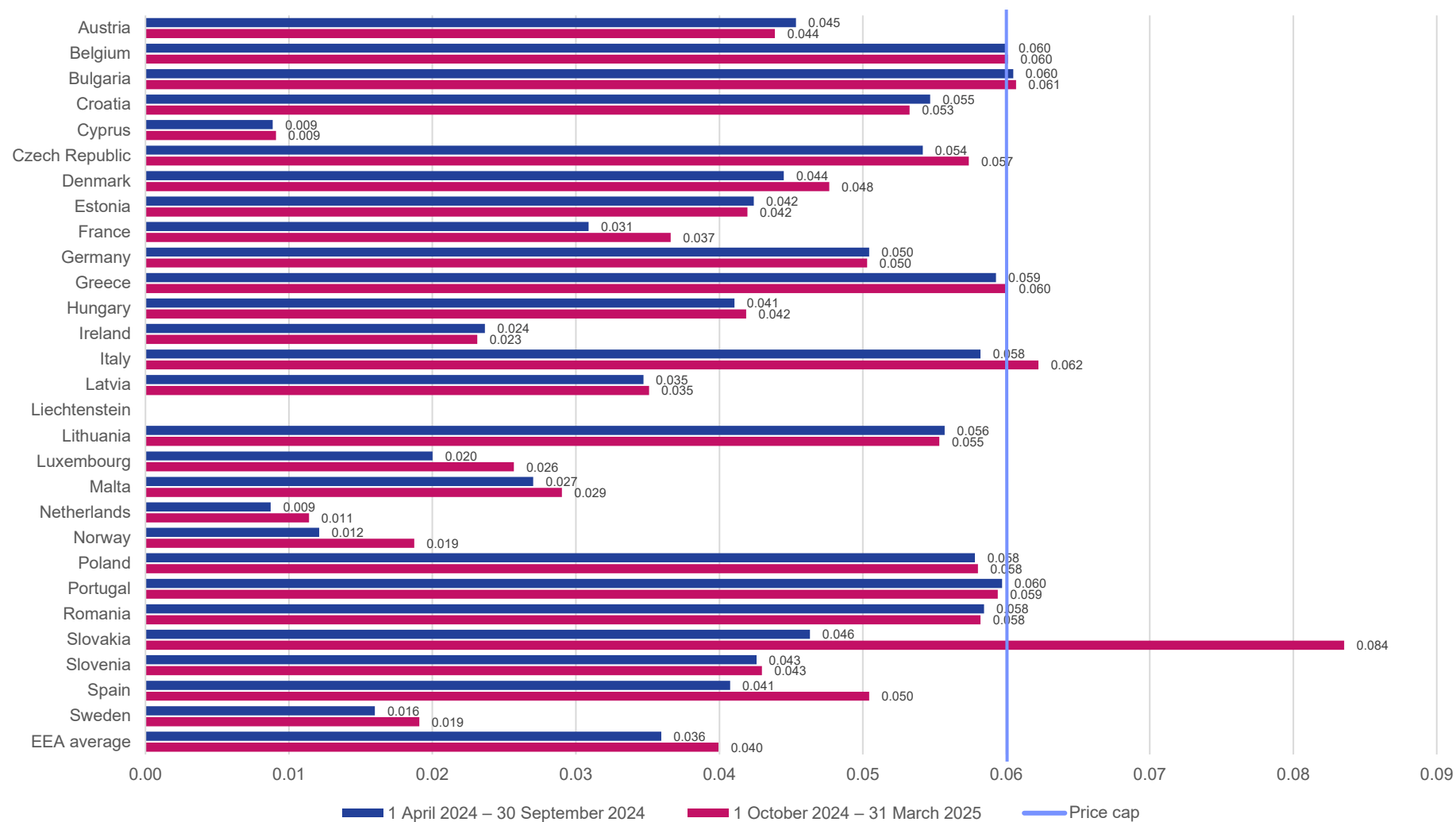
**Figure 27:** Revenues (in EUR) per mobile minute for intra-EU calls from alternative tariffs – 31 March 2025

**Notes:** Data for Germany and Hungary is confidential. Only a few of the EU operators are offering alternative plans for mobile network regulated international communications.

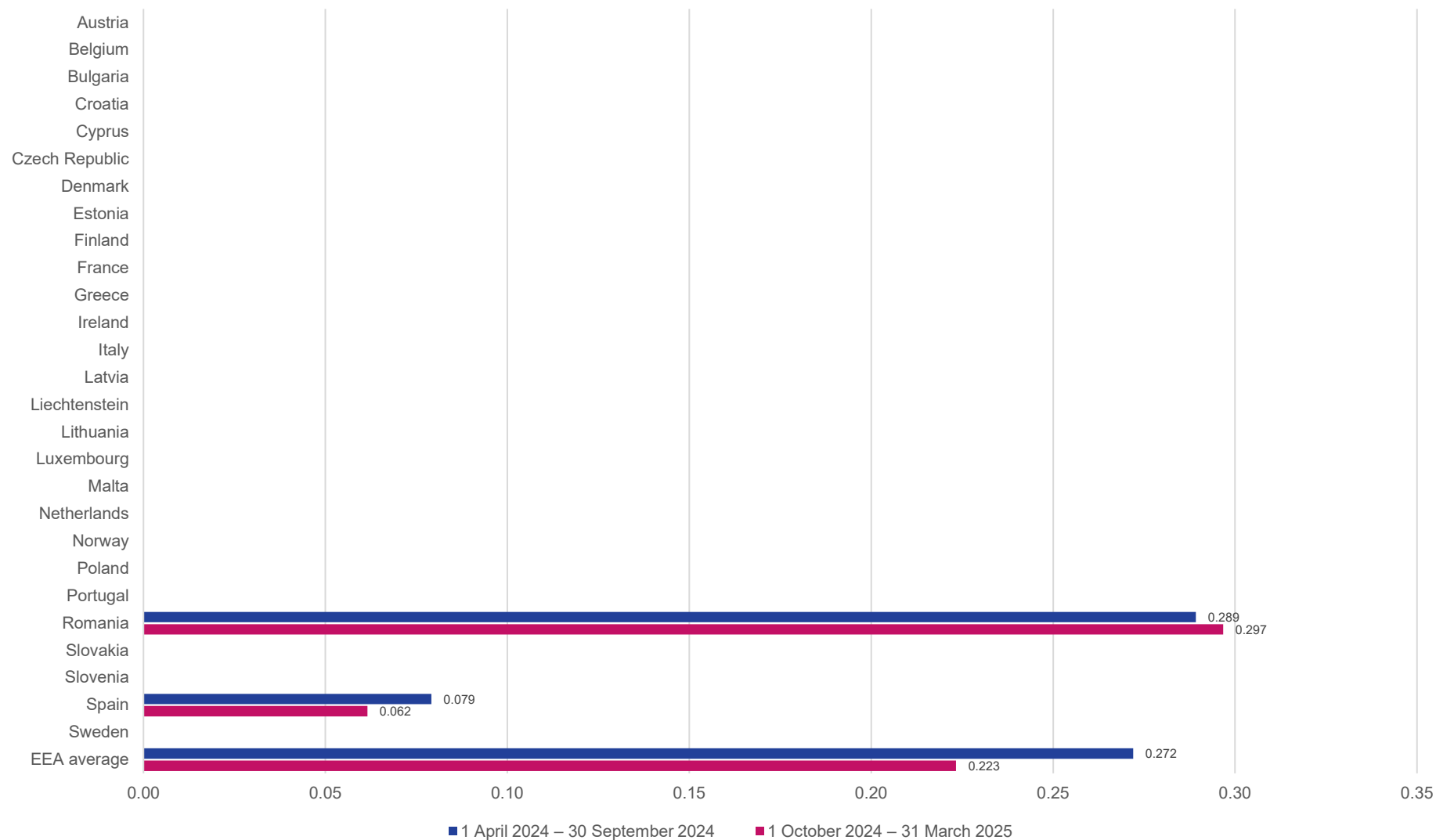


**Figure 28:** Evolution of EEA average revenues (in EUR) per mobile minute for intra-EU calls from alternative tariffs

#### **5.3.2. SMS revenues**

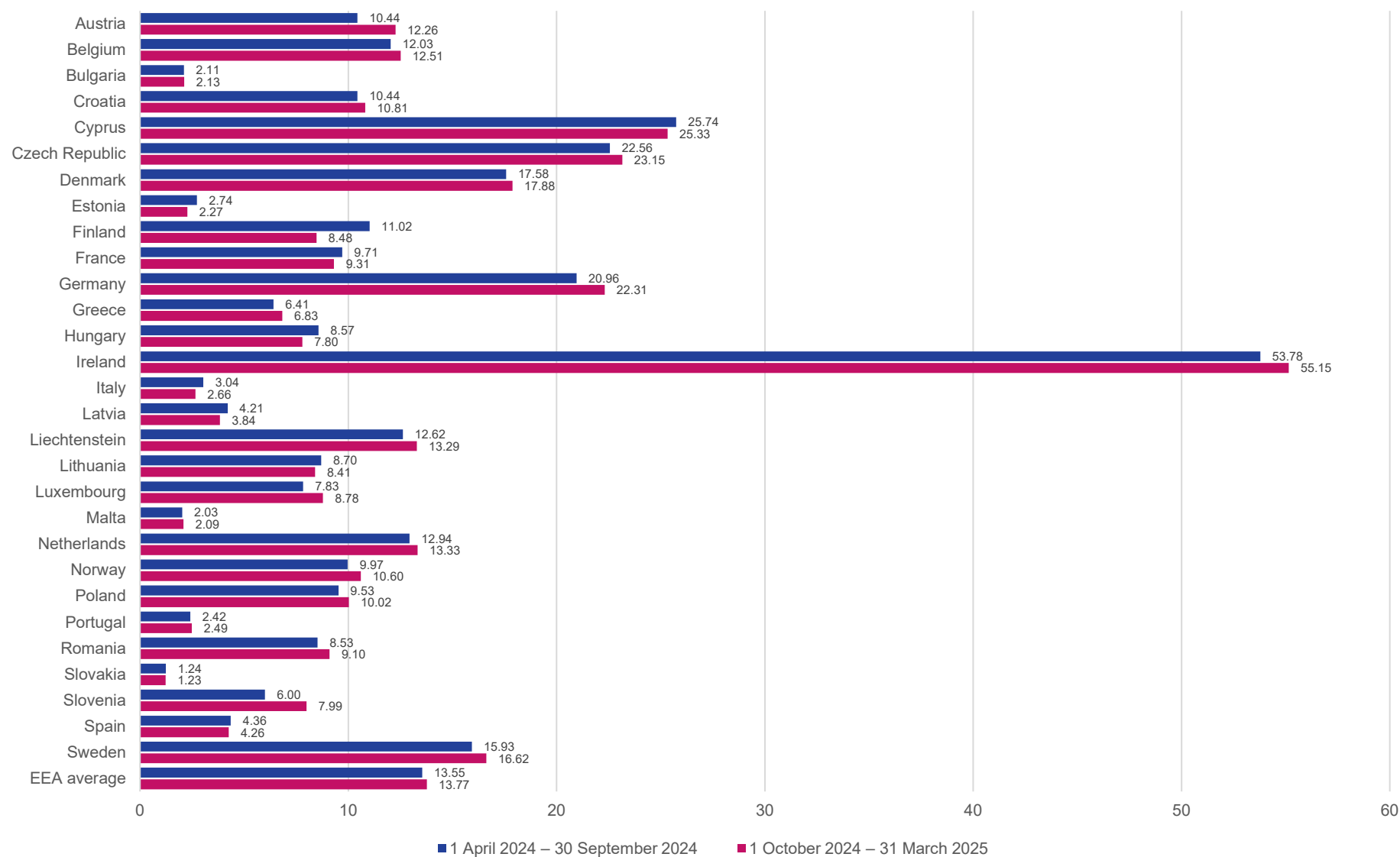
**Figure 29:** Revenues per SMS for price regulated intra-EU messages

*Note:* Price cap discrepancies happen due to operators' technical reasons (core networks' migration, etc.) to provide revenues/volumes of SMS.

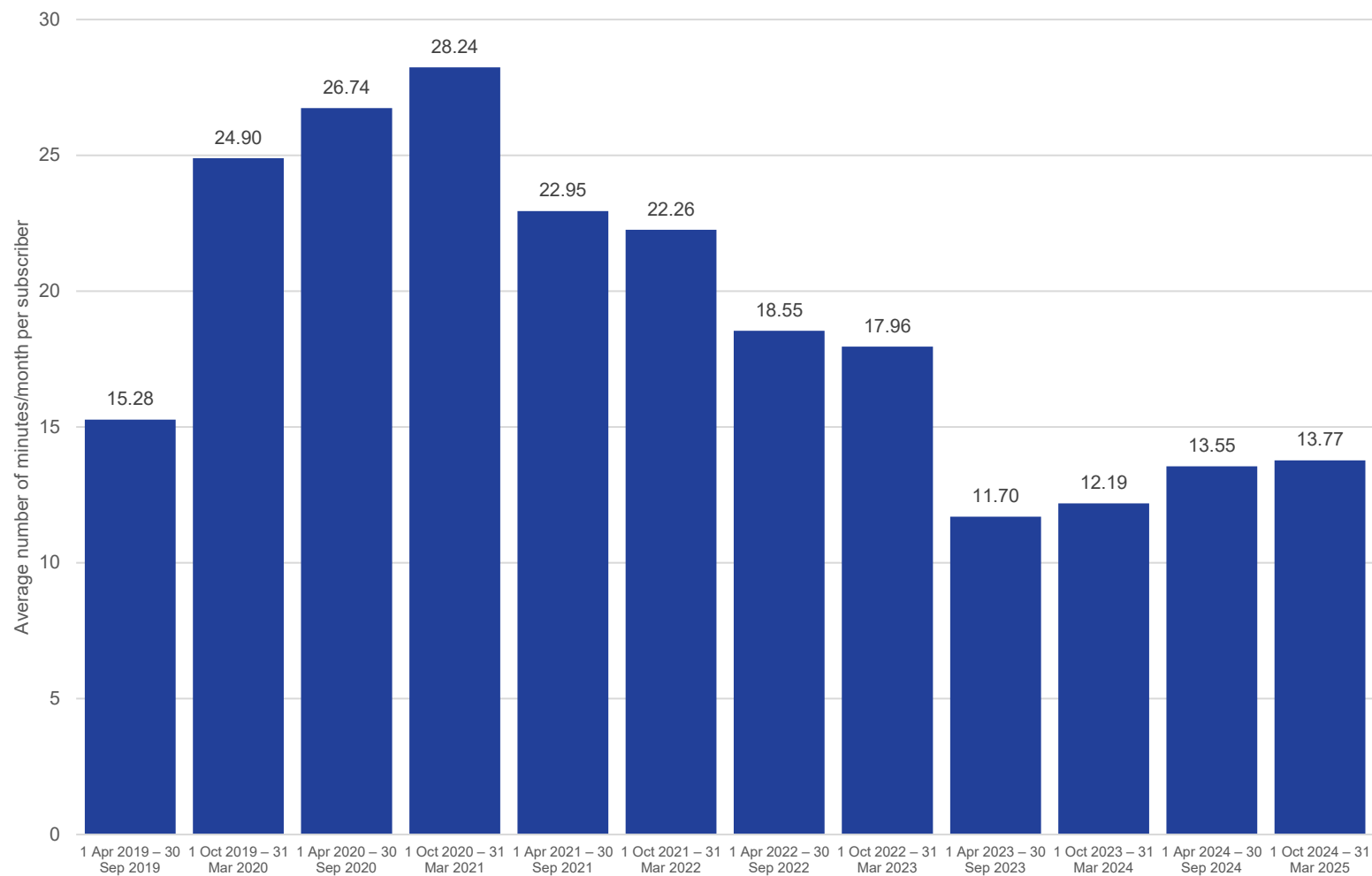
**Figure 30:** Revenues per SMS for intra-EU messages from alternative tariffs

#### **5.4. Consumption patterns (fixed, mobile voice and SMS)**

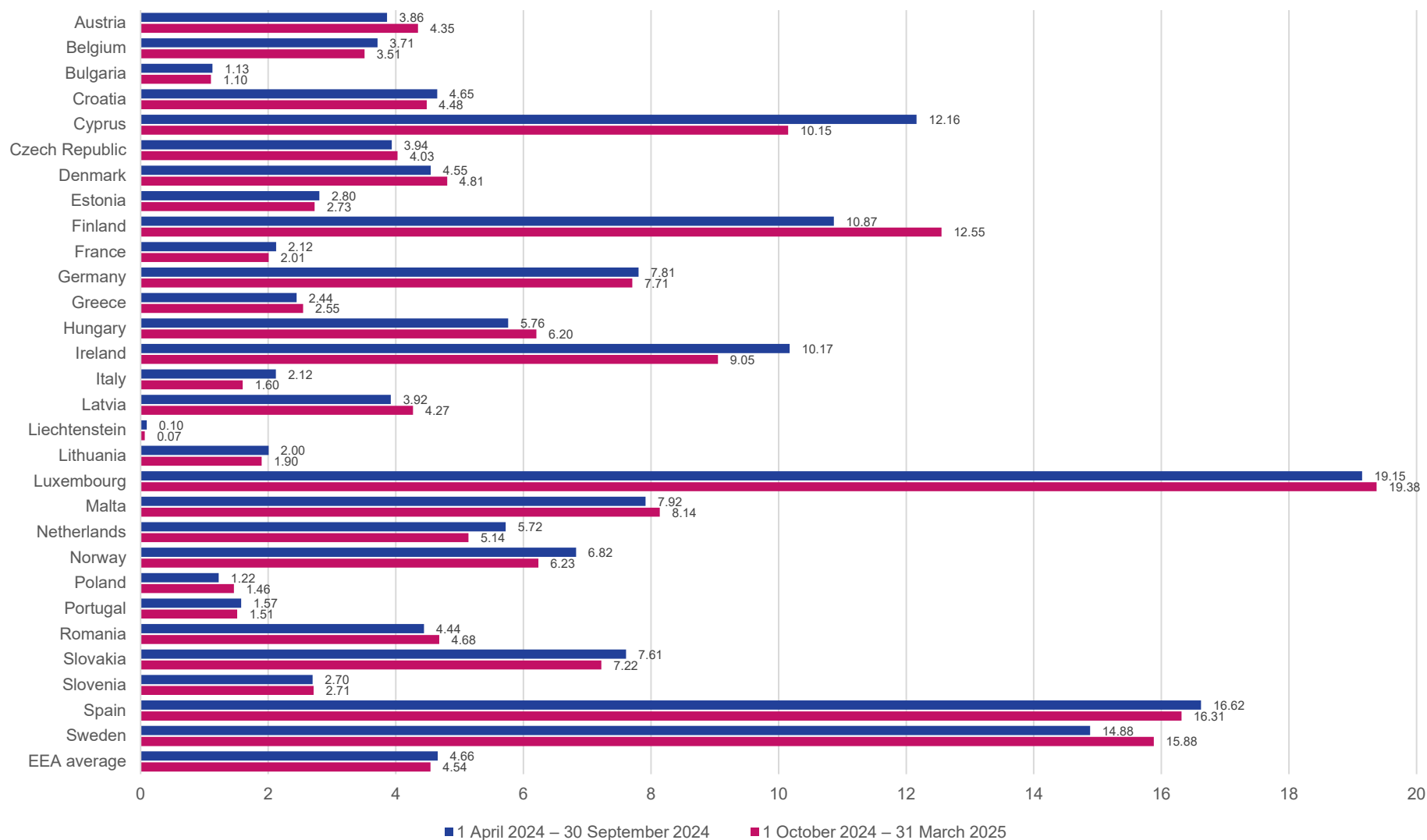
Please note that due to a change in methodology applied in the last two reports (including the present one), the results of Figures 31–36 mentioned in this subsection are not directly comparable with those of earlier reports. While the figures in earlier reports showed all intra-EEA minutes/SMS divided by the total number of subscribers per month, in the last two reports the minutes and SMS included in bundles were excluded, in order to reflect that the number of consumers used in the calculations only comprises those using either price-regulated intra-EEA or alternative tariffs.

**Figure 31:** Average number of regulated intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services)

**Figure 32:** EEA average number of price-regulated fixed Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services)

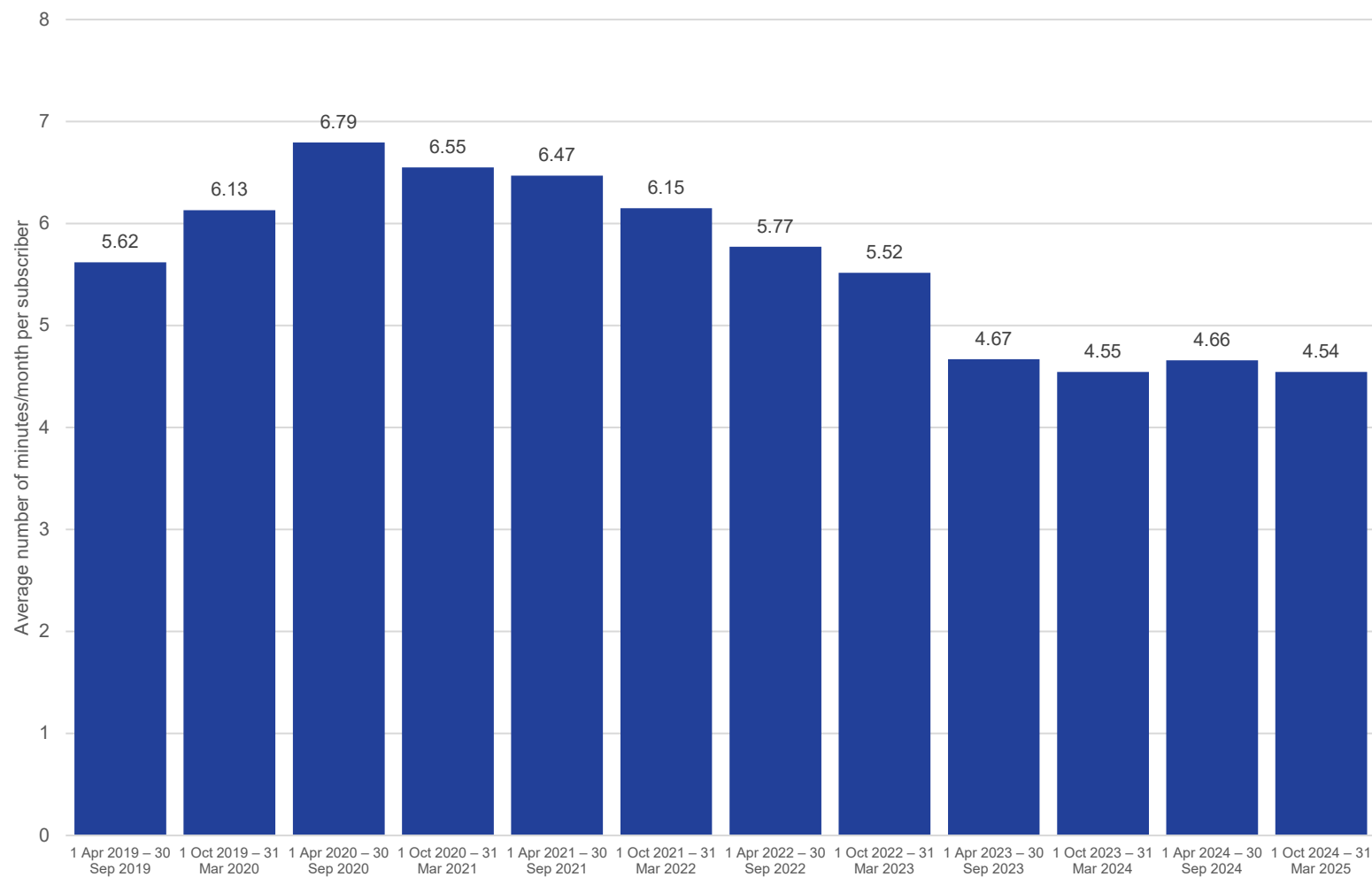


**Figure 33:** Average number of price-regulated mobile Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services)

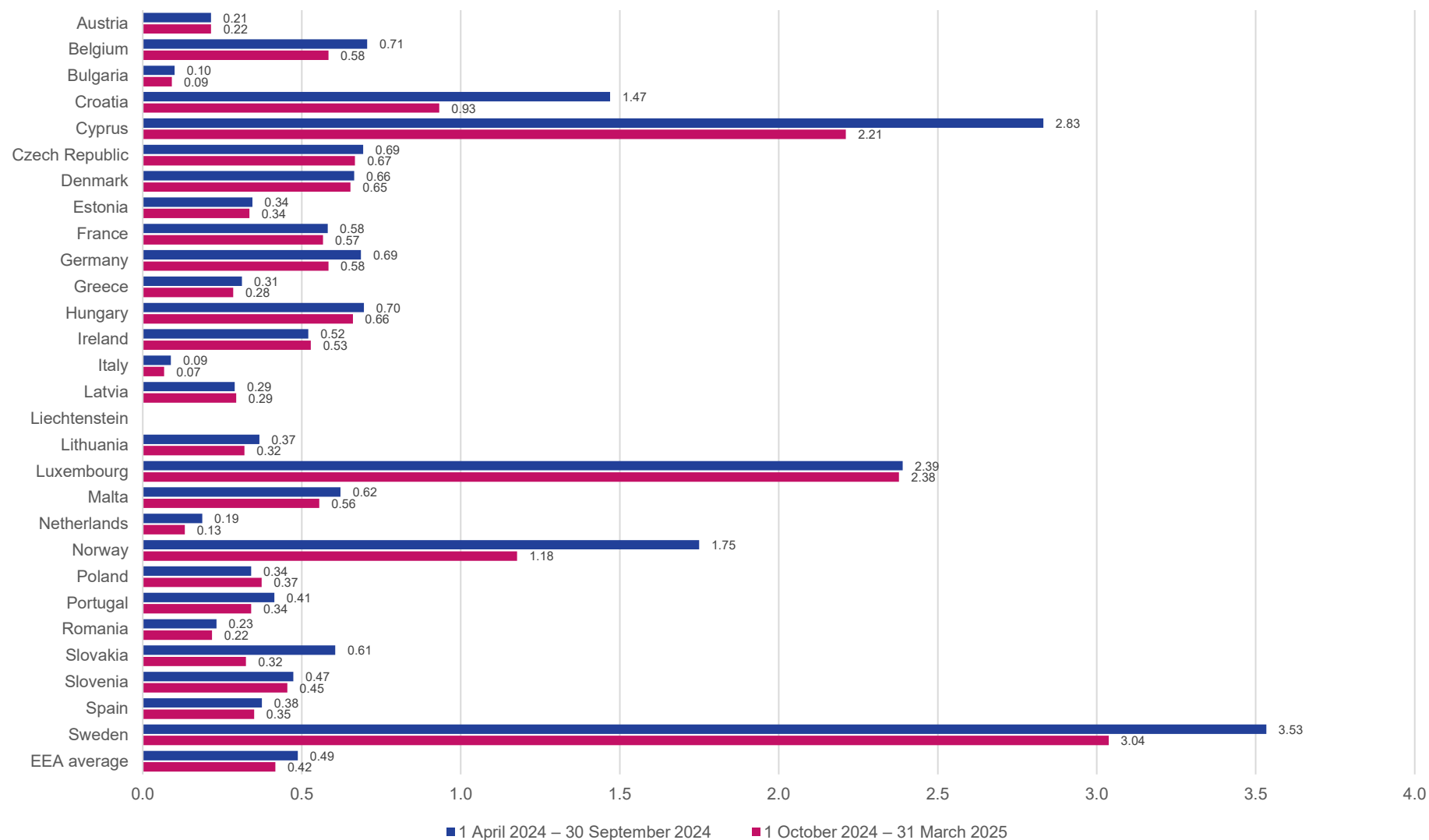




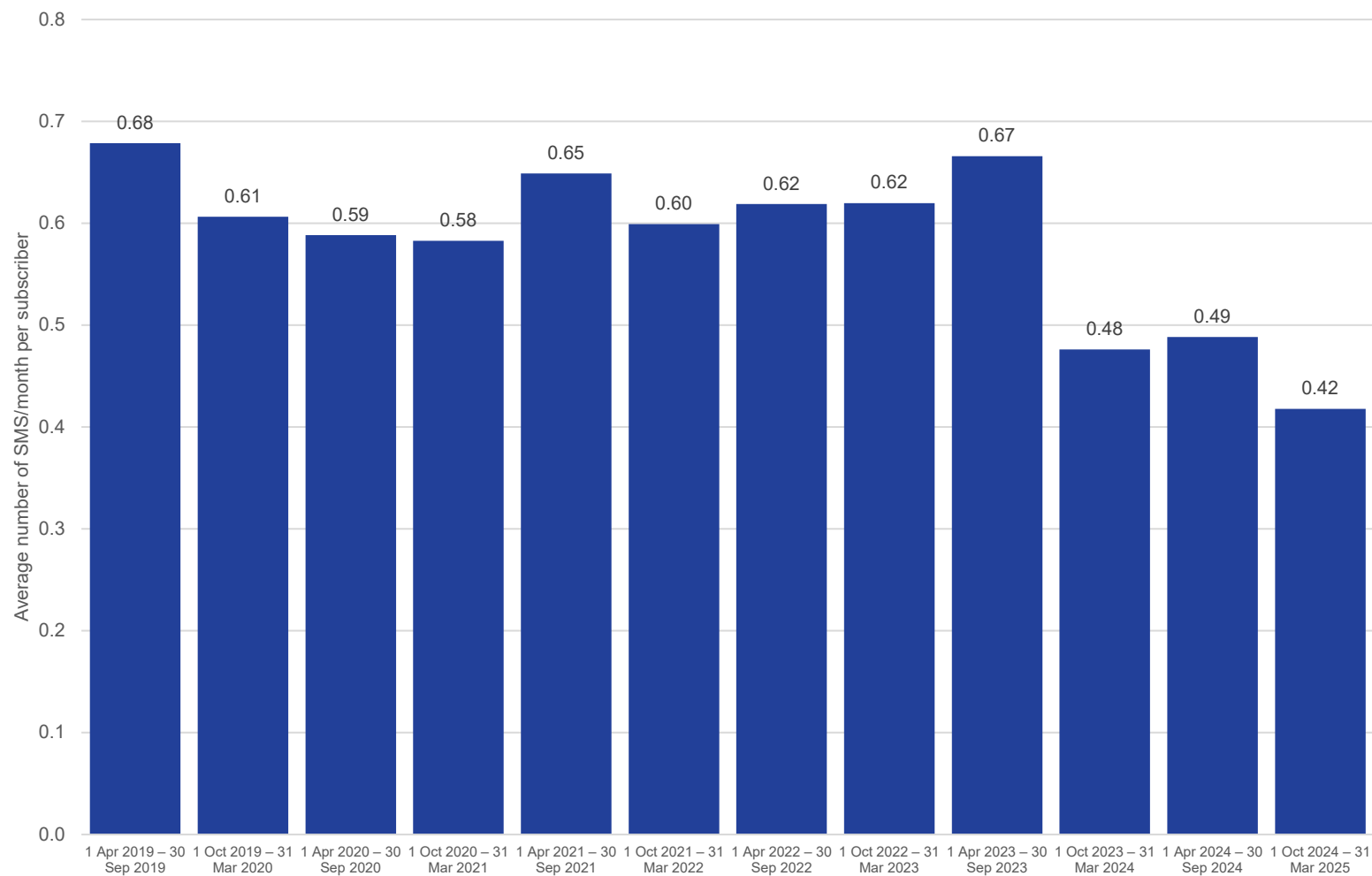
**Figure 34:** EEA average number of price-regulated mobile Intra-EU minutes per month per subscriber (subscribers that used Intra-EU communications services)



**Figure 35:** Average number of price-regulated mobile Intra-EU SMS per month per subscriber (subscribers that used Intra-EU communications services)



**Figure 36:** EEA average number of price-regulated mobile Intra-EU SMS per month per subscriber (subscribers that used Intra-EU communications services)



## **Annex I: Methodology for the data collection**

A limited number of operators did not supply data related to specific indicators in the questionnaire. This is not uncommon in comprehensive data collections of this type. In most cases, national regulatory authorities (NRAs) liaised directly with the operators to resolve or mitigate the issue.

Some NRAs reported persistent data quality challenges at the level of national operators, including inconsistencies resulting from different internal reporting systems used by operators. To facilitate comparability, all monetary values in this Report are presented in Euros. Within the EEA, currency fluctuations between the Euro and non-Euro national currencies may have influenced the reported average prices for countries outside the Eurozone.

All retail prices presented in the figures exclude VAT and represent an average of prices paid by customers on both postpaid and prepaid tariff plans.

The Intra-EU Communications Regulation also applies to the EEA EFTA States – Norway, Iceland, and Liechtenstein. For calls and SMS originating in these countries, the rules apply from the date they are incorporated into the EEA Agreement. This Report includes data from Norway and Liechtenstein.

## Annex II: List of respondents

Operators that provided data for the period 1 April 2024 – 31 March 2025:

### Austria

A1 Telekom Austria AG  
 Alfred Hochleithner Telekommunikation  
 Citycom Telekommunikation GmbH  
 Deutsche Telekom Global Business Solutions GmbH  
 DIALOG telekom GmbH & Co KG  
 Finarea SA  
 GTT Cloud Austria GmbH  
 HostProfis ISP Telekom GmbH  
 HOT Telekom und Service GmbH  
 Hutchison Drei Austria GmbH  
 Innsbrucker Kommunalbetriebe AG  
 ITNS GmbH  
 kabelplus GmbH  
 LINZ STROM GAS WÄRME GmbH  
 LIWEST Kabelmedien Gesellschaft mbH  
 LTK Telekom und Service GmbH  
 Michael Hakala  
 mieX GmbH  
 MTEL Austria GmbH  
 NTT Cloud Communications SAS  
 oja.at GmbH  
 Orange Business Austria GmbH  
 Riepert Informationstechnologie GmbH  
 RMTS Telekom und Service GmbH  
 Russmedia IT GmbH  
 Salzburg AG für Energie, Verkehr und Telekommunikation  
 Smartspace  
 spusu - Mass Response Service GmbH  
 Telnyx Ireland Ltd.  
 T-Mobile Austria GmbH  
 T-Systems Austria GesmbH  
 Voxbone SA

### Belgium

Lycamobile  
 Mobile Vikings  
 Orange  
 Proximus  
 Telenet  
 Voo

### Bulgaria

Bulgarian Telecommunication Company (Vivacom)  
 Telenor Bulgaria

A1 Bulgaria  
 Coooolbox

### Croatia

Hrvatski Telekom  
 A1 Hrvatska  
 Telemach

### Cyprus

Cablenet  
 Cyta  
 Epic  
 Primetel

### Czech Republic

České Radiokomunikace  
 ČEZ Prodej  
 ČEZ ICT Services  
 Dragon Internet  
 MiniTEL  
 Spinoco Czech Republic  
 O2 Czech Republic  
 Quantcom  
 Tesco Mobile ČR  
 T-Mobile Czech Republic  
 Vodafone Czech Republic

### Denmark

Hi3G Denmark  
 Nuuday  
 Telenor  
 TeliaDanmark

### Estonia

Elisa Eesti AS  
 STV AS  
 Telia Eesti AS  
 Tele2 Eesti AS

### Finland

Ålands Telekommunikation  
 DNA  
 Elisa Corporation  
 Telia Finland  
 European Mobile Operator (MOI)

**France**

Bouygues Telecom  
 BTBD Mobile  
 Coriolis Telecom  
 Iliad/Free  
 La Poste Telecom  
 Lycamobile  
 Orange  
 SFR  
 SRR

**Germany**

Deutsche Glasfaser  
 Deutsche Telekom  
 EWE TEL  
 freenet  
 Lebara Mobile Germany  
 Lycamobile Europe  
 M-net  
 NetCologne  
 Tele Columbus  
 Telefónica Germany  
 United Internet  
 Vodafone

**Greece**

Nova Telecommunications & Media S.M.S.A.  
 OTE S.A. (COSMOTE MOBILE  
 TELECOMMUNICATIONS & HELLENIC  
 TELECOMMUNICATIONS ORGANIZATION  
 S.A)  
 Vodafone Panafon SA

**Hungary**

DIGI Távközlési és Szolgáltató Kft.  
 Magyar Telekom Nyrt.  
 Netfone Telecom Kft.  
 One Magyarország Zrt.  
 PR-Telecom Zrt.  
 TARR Kft.  
 Yettel Magyarország Zrt.

**Ireland**

An Post Mobile  
 Digiweb  
 Eircom Limited  
 Hutchison 3G Ireland  
 Imagine  
 Lycamobile  
 Magnet  
 Pure Telecom

Sky Ireland  
 Tesco Mobile Ireland  
 Virgin Media  
 Vodafone Ireland

**Italy**

Digi Italy  
 ERG Mobile  
 Fastweb  
 Tre  
 Lycamobile  
 Poste Mobile  
 Tim  
 Tiscali  
 Vodafone  
 Wind

**Latvia**

SIA "BITE Latvija"  
 "Latvijas Mobilais Telefons" SIA  
 SIA "Tele2"  
 SIA "Tet"  
 CSC TELECOM SIA  
 SIA N Tel Solutions  
 VAS "Latvijas dzelzceļš"  
 AS "Balticom"  
 SIA "Fixed Lines"  
 SIA "BMI TELECOM"

**Liechtenstein**

Hoi Internet  
 Li-life web+it  
 Salt (Liechtenstein)  
 Speedcom  
 Supranet  
 Swisscom (Schweiz)  
 Telecom Liechtenstein  
 TV-COM  
 Vestra ICT  
 Voxphone

**Lithuania**

Bite Lietuva  
 Telia Lietuva  
 Tele2  
 Teledema

**Luxembourg**

POST  
 Proximus Luxembourg  
 Orange Communications Luxembourg

**Malta**

Melita Ltd  
GO plc  
Epic Communications Ltd

**Netherlands**

Budget Thuis  
Delta Fiber  
KPN  
Lebara  
Lycamobile NL  
Odido  
Online  
Vodafone Ziggo

**Norway**

Chilimobil  
Fjordkraft Mobil  
Ice Communication  
Lycamobil  
Telenor Norge  
Telia Norge

**Poland**

Lycamobile  
Multimedia Polska  
Netia  
Orange Polska  
P4  
Polkomtel  
T-Mobile Polska  
Telego  
Telestrada  
Vectra  
Virgin Mobile  
UPC Polska

**Portugal**

NOS Comunicações, S.A  
MEO – Serviços de Comunicações e Multimédia, S.A.  
Vodafone Portugal – Comunicações Pessoais, S.A.  
NOWO Communications, S.A  
NOS Açores Comunicações, S.A.  
NOS Madeira Comunicações, S.A.  
Lycamobile Portugal, Lda  
Digi Portugal, Lda

**Romania**

Nextgen Communications  
Orange Romania  
Digi Romania  
Vodafone Romania  
Telekom Romania Mobile Communications

**Slovak Republic**

O2 Slovakia  
Orange Slovensko  
Slovak Telekom  
SWAN Mobile

**Slovenia**

TELEKOM SLOVENIJE, D.D.  
A1 Slovenija d.d.  
TELEMACH D.O.O.  
T-2 d.o.o.  
IZI mobil, d.d.  
HOT mobil, telekomunikacije in storitve d.o.o.  
Mega M d.o.o.  
SoftNET d.o.o.

**Spain**

Digi Spain Telecom, S.L.  
Euskaltel, S.A.  
Orange Espagne, S.A. Unipersonal  
Orange España Virtual, S.L.U.  
Pepemobile, S.L.  
R Cable y Telecable Telecomunicaciones, S.A.U.  
Telefónica de España, S.A.U.  
Telefónica Móviles de España, S.A. Unipersonal  
Vodafone Enabler España, S.L.  
Vodafone España, S.A. Unipersonal  
Vodafone ONO, S.A.U.  
Xfera Móviles, S.A. Unipersonal

**Sweden**

Hi3G Access  
Telenor Sverige  
Telia Company  
Tele2 Sverige