

Press Release

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Europe's telecom sector delivers great value for money and shows progress, but still has ground to cover on some dimensions

European consumers benefit from affordable broadband services and a sector that remains financially resilient overall and supportive of investment and innovation, according to BEREC's latest fact-finding report on where Europe stands in telecommunications. At the same time, the EU-27 still has to fill in the gap to the top global peers on network download speeds, while the roll-out of next-generation networks is not yet complete.

In its fact-finding report, BEREC sketches a comparative picture of where Europe stands on connectivity, services affordability, network performance, competitive landscape, access regulation and consolidation matters, as well as operators' overall financial health, highlighting both the sector's strengths and the areas where further progress is needed.

The report also underscores the determinant role of the EU's regulatory framework in promoting competition and helping to create dynamic markets that are supportive of innovation and investments, while also delivering real value to European consumers.

In identifying areas for improvement, the report concludes that the sector still has ground to cover when it comes to download speed for broadband services and connectivity take-up. Although the sector remains financially resilient overall and investment is progressing, the mission is not fully accomplished, with areas that still require coverage and the digital divide to be bridged.

The report's key findings in detail

The report highlights several key areas in which the EU telecommunications sector performs comparatively strong, while also identifying areas where further progress is needed.

Affordable services

One of the report's key findings is that EU consumers benefit from some of the lowest fixed and mobile broadband prices among the jurisdictions examined, with prices significantly lower than in South Korea and the United States. European consumers generally enjoy significantly better value for money compared to other leading countries in telecommunications.

Advances in coverage and digital inclusion

Broadband connectivity is advancing rapidly, with fibre-to-the-premises (FTTP) and 5G deployment bringing the EU closer to leading international peers. Several Member States are already among the world's top performers, with eight countries achieving 100% 5G coverage ahead of the 2030 target.

The EU has also made substantial progress in narrowing the urban-rural divide when it comes to connectivity, though there is still room for improvement. While 5G coverage gaps between urban and rural areas are now comparable with China and the United States, differences remain in fixed high-speed broadband availability.

Several European countries, including Denmark, the Netherlands and Spain, rank among the Organisation for Economic Co-operation and Development's (OECD) top performers regarding households where fixed broadband capable of delivering speeds of 100 Mbps or more is available, demonstrating the potential for further progress across the bloc.

Quality of service and network performance

While average download speeds continue to trail those of leading markets, Europe performs average on upload speeds and very well in latency. In 2024, the top performer, France, achieved fixed download and upload speeds above those of the other jurisdictions examined.

The picture is similar for mobile networks. Europe trails the other jurisdictions examined in terms of average download speeds but performs strongly on latency. The report therefore indicates that the EU delivers strong value for money, combining comparatively affordable broadband services with network performance that, while not generally matching global leaders on download speeds, remains competitive across several quality indicators.

Evidence from consolidation

BEREC finds that the current EU framework allows operators to pursue consolidation, both across borders and within Member States, where transactions do not harm competition. Examined cases demonstrate that, should operators deem greater scale as indispensable for the pursuit of their business cases, it can be achieved under the existing merger-control framework, sometimes with remedies designed to preserve competition.

At the same time, the evidence does not show that greater scale automatically leads to more investment, innovation or competitiveness. BEREC points to the recent downsizing of several large operators' international portfolios as an indication that scale may have diminishing benefits beyond a certain point.

The evidence reviewed also points to potential trade-offs for consumers. Greater competition is associated with lower prices, whereas evidence from mergers indicates that prices increase in the short to medium term following the mergers, even with remedies in place. On this basis, the report finds no clear evidence that consolidation, by itself, delivers stronger investment or innovation outcomes.

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Taken together, the findings suggest that the question is not simply whether Europe needs more or fewer operators, but how market structure, investment and competition interact to deliver better outcomes for consumers and the sector as a whole.

Background

BEREC's fact-finding report aimed to provide an international comparison of the EU telecommunications sector, examining broadband connectivity, network quality, pricing, competition, operators' financial performance and regulatory approaches. It was prepared against a backdrop of significant changes in telecommunications markets, including network deployment and technological developments, changes in operators' business strategies and recent consolidation cases, as well as ongoing discussions on the future EU regulatory framework.

The report compares the EU-27 with a range of major international jurisdictions, including Australia, Canada, China, Japan, South Korea, the United Kingdom and the United States. BEREC analysed data from different sources, taking into account their availability and reliability, to provide an evidence-based picture of where Europe stands internationally and of the differences between individual Member States and operators. In its endeavour, BEREC has relied on verifiable, publicly available sources, to inform an objectively rounded view of the sector's status quo.

The draft report was adopted by BEREC's Board of Regulators on 12 March 2026 and subsequently opened for public consultation, with stakeholders invited to submit contributions by 8 May 2026. Following the consultation, BEREC reviewed the feedback received and finalised the report.

What's next

Follow the public debriefing on 7 October 2026, when BEREC's Co-Chairs will present the final report and answer questions. The event will be livestreamed, and participants can submit questions in advance through this [registration form](#).

Explore the findings

Dive deeper into the report through BEREC's media kit, featuring key findings, figures and supporting materials. And keep an eye out for the upcoming BEREC podcast, bringing expert perspectives on where Europe stands in the global telecommunications landscape.

Read the full report

The full BEREC fact-finding [report](#) is available on the BEREC website. The report will be presented at the BEREC public debriefing, taking place on 7 October 2026 in Brussels at the IRG Secretariat. The event will also be livestreamed, allowing media representatives to follow the discussion remotely. Journalists are invited to attend the event in person or follow the livestream. Those wishing to ask questions are encouraged to submit them in advance via the

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[registration form](#) or by [email](#). Experts will also take questions during the event, either through the Q&A chatbox accompanying the livestream or from journalists attending in person. A dedicated media kit is available alongside the report, providing ready-to-use materials for journalists and other stakeholders. It includes visuals, infographics and one-pagers highlighting the key findings of the fact-finding report, making the evidence and its implications easy to understand and share. A podcast discussing the fact-finding report will also be available on BEREC's communication channels in the upcoming months.

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