

# Europe's Telecom Reality Check – Fact-finding report on connectivity, competition and regulatory highlights in different jurisdictions

## Summary of key findings

BEREC's 'Fact-finding report on connectivity, competition and regulatory highlights in different jurisdictions' provides an overview of the EU's performance across key telecommunications indicators compared with other countries worldwide.

The report focuses on service affordability, network coverage and performance, market competition, access regulation, consolidation trends, and operators' financial health.

Its findings show that European consumers benefit from some of the lowest fixed and mobile broadband prices globally while still receiving good-quality services. For example, in 2022, a 20-gigabyte mobile data basket in the EU cost an average of EUR 16.15, compared to EUR 37.87 in the United States and EUR 46.73 in South Korea. EU prices remained broadly comparable to those in Japan. Meanwhile, prices in Europe only seem to have followed the descending trend further. In terms of quality of service, while average EU download speeds remain below those of some global peers and upload performance is more moderate, latency remains a clear EU strength, and top-performing Member States achieve world-class broadband quality.

On coverage and digital inclusion, the EU is making steady, measurable progress. As of 2024, 69.2 % of EU households had access to fibre-to-the-premises (FTTP) coverage (up from 49.7 % in 2021) and 94.3 % had 5G coverage (up from 65.8 % in 2021). The EU has also made great strides in narrowing the urban-rural gap in broadband connectivity, and specifically in fixed high-speed connectivity (above 100 megabits per second).

The EU telecommunications market is characterised by diversity: many EU citizens can choose from at least four fixed nationwide operators, compared with over a third of Americans, who have at most one option. This diversity fosters competition, a key driver of innovation and investment. The report also finds that the EU's regulatory framework effectively supports competition, investment and connectivity objectives through coordinated *ex ante* regulation and appropriately designed wholesale access obligations.

The report also examines market consolidation and concludes that, while consolidation remains possible under existing EU rules, the available empirical evidence generally associates mergers with higher consumer prices, while benefits in investment and innovation remain uncertain.

Finally, the report finds European operators generally financially healthy and resilient, with potential for further financial growth as investments mature and FTTP/5G roll-outs progress. This growth is also driven by challengers in major EU markets, which typically invest more extensively than incumbents.

Overall, the report shows that the EU telecommunications sector performs comparatively well across a wide range of indicators. While challenges remain and performance is not uniform across markets, the outlook for Europe's telecommunications sector remains positive.

Read the full report on our web page.