

EUROPE'S TELECOM SECTOR IN PERSPECTIVE

A global comparison of connectivity, competition and access regulation

The evidence points to a European telecom sector delivering **comparatively strong outcomes** across three key dimensions:



Affordable prices for consumers

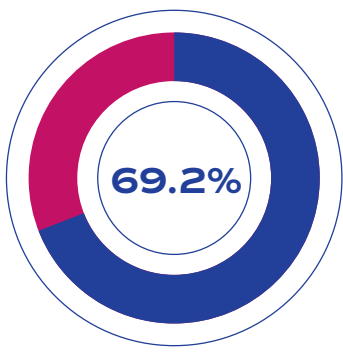
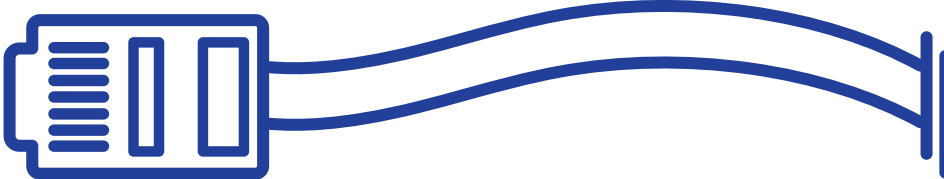


Expanding high-speed broadband network coverage



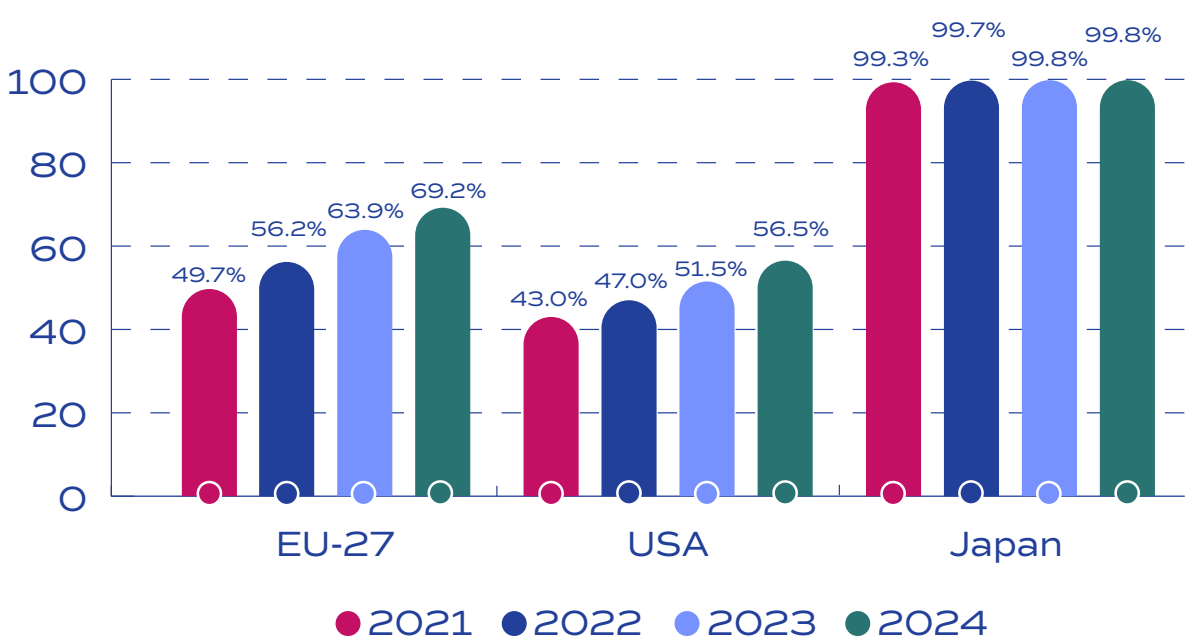
Financially healthy operators overall, despite notable differences in some cases

Fibre coverage:
Europe is progressing, with room to grow

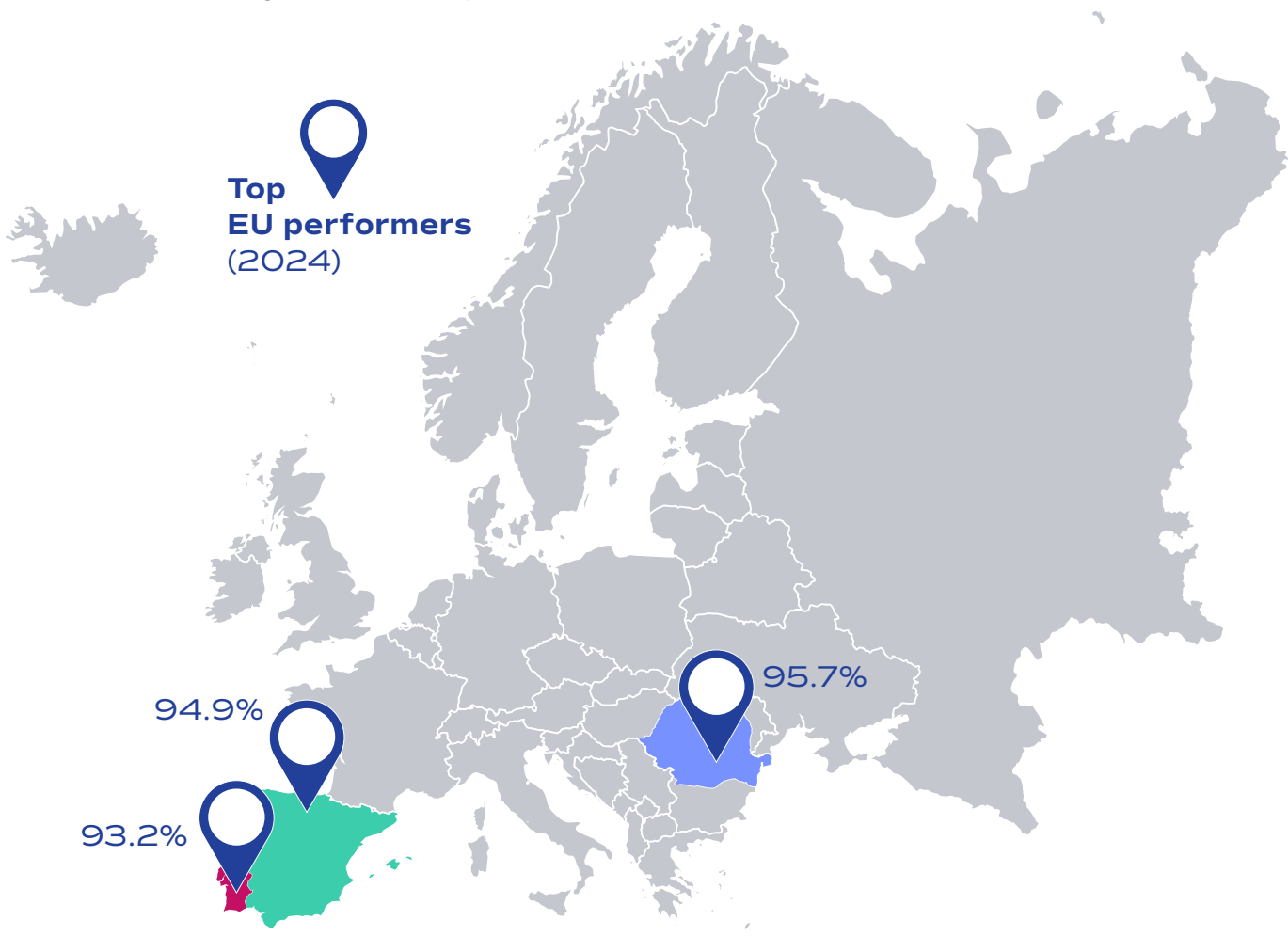


EU households were covered by fibre-to-the-premises (FTTP) networks in 2024.

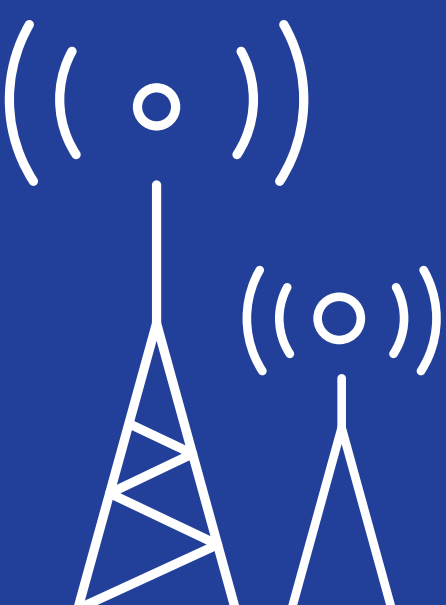
EU fibre coverage increased substantially between 2021 and 2024, surpassing that of the USA but remaining below Japan's estimated level.



Spain, Portugal and Romania recorded the highest coverage among EU Member States, at levels very close to Japan's.



Pillars of telecom performance



Affordability is a European strength

EU fixed and mobile broadband prices are generally lower than in the United States and South Korea, and broadly comparable with Japan.

Competition (including through effective access regulation) supports investment and consumer benefits

BEREC identifies competition, enabled by the EU regulatory framework, as a key driver of investment, increase in quality of services and innovation, and overall sectoral progress.

Operators maintain sound financial conditions, albeit with differences

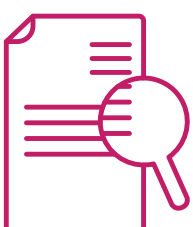
BEREC reports stable margins and positive financial outlooks as major fibre and 5G investments mature. However, the situation is not uniform across Europe.

EU averages conceal diverse national outcomes

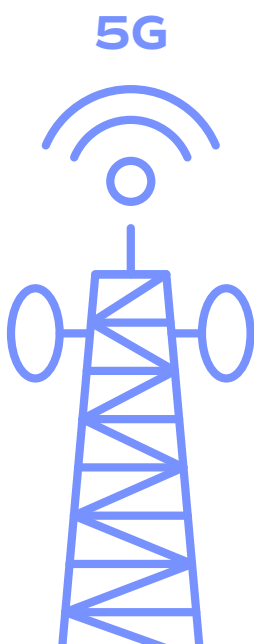
In 2024, **eight** EU Member States reached **100% 5G coverage**.

In the same year, FTTP coverage in the three leading EU Member States ranged from **93% to 96%**.

Despite strong performance in leading markets, gaps in network deployment and fibre take-up persist across the jurisdictions concerned, including in the EU.



BEREC's findings highlight the role of competition, access regulation and investment in shaping Europe's telecom sector, while underscoring differences across national markets and opportunities for further progress.



EXPLORE THE EVIDENCE BEHIND THE **BIG PICTURE**

Read **BEREC's 'Europe's Telecom Reality Check: Fact-finding report on connectivity, competition and regulatory highlights in different jurisdictions'**.