

**BIPT Council 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]**



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1. Executive summary

1. Every year the BIPT compares prices of telecom services in Belgium and its neighbouring countries. The last time this comparison was made was in December 2022.¹ In this section the results of this year's study, which are based on tariff plan information collected in October 2023, are summarised and compared to those of the previous edition.
2. In 2022 the BIPT concluded that, as for **mobile subscriptions**, Belgium maintained a middle position for needs up to 50 GB a month. In the highest segment, exceeding 50 GB, Belgium was expensive. One year later the BIPT comes to the following conclusions:
 - 2.1. Belgium has lost its middle position for **subscriptions with a limited data volume** (up to 5 GB). In the meantime the prices for consumers with the lowest requirements **far exceed those in all neighbouring countries**.
 - 2.2. Belgium still holds a **middle position for medium to large subscriptions**, i.e. between 20 and 70 GB.
 - 2.3. Consumers whose **data needs are the highest** (100 or 200 GB) pay the most in Belgium. In this category, **Belgium is the most expensive country** again.
3. In the context of high inflation, operators have made one or more adjustments to their offerings over the past year. In Belgium, the mobile market generally experienced a 'more-for-more' approach, where both the price and the amount of gigabytes increased.
4. Regarding **fixed Internet and bundles** the BIPT concluded last year that Belgian prices were somewhat in line with those of its neighbouring countries for specific profiles, but became remarkably more expensive as the user's requirements went up. In this update the conclusion is that the situation has not changed very much this year. It turns out that:
 - 4.1. **Belgium remains notably more expensive** for every consumer profile than France and the United Kingdom, which are by far the cheapest countries in this study.
 - 4.2. Belgium remains **reasonably affordable** for **limited triple play needs** (30 TV channels, 50 Mbps download speed and fixed telephony) thanks to Scarlet's offer.
 - 4.3. For **stand-alone Internet or Internet in a bundle with mobile** Belgium is still in line with the Luxembourg and Germany, but becomes **increasingly more expensive** than the same countries **as the needs to be fulfilled increase**.
5. In both Belgium and its neighboring countries, prices for fixed Internet and bundled offerings generally increased in the past year. On the one hand, Belgium has moved slightly closer to the average of the neighboring countries for certain profiles (mainly 1P and 2P), but the gap for profiles with greater needs (3P and 4P) remains significant.
6. The difference in market dynamics between the mobile and fixed markets is partly due to higher churn rate in standalone mobile subscriptions than in bundles and the expected entry of the fourth mobile operator in 2024. Orange shifting from a challenger position to an

¹ BIPT Council 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].

established player has also contributed to a softening of the competition dynamic on the fixed market. This is apparent from the fact that, like other traditional operators, it significantly increased its prices in 2023. The potential launch of bundles with fixed Internet by fourth mobile operator DIGI could lead to a revival of competitive dynamics in the fixed market.

2. Mobile services

7. In this chapter the prices of mobile subscriptions in Belgium are compared to those in the neighbouring countries.

For each consumer profile in each country, the cheapest subscription is selected, and adjusted according to Belgian purchasing power parity. This study only focuses on operators with a market share of more than 5%, as well as their secondary brands, if any. A description of the methodology can be found in Annex 1. The profiles have different data needs and require each time 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 of the prices of all mobile operators in Belgium, their evolution compared to last year and the way for consumers to save money, can be found in the BIPT Communication of 3 October 2023 on mobile service tariffs.²

2.1. 2023 international benchmark

9. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries for October 2023.

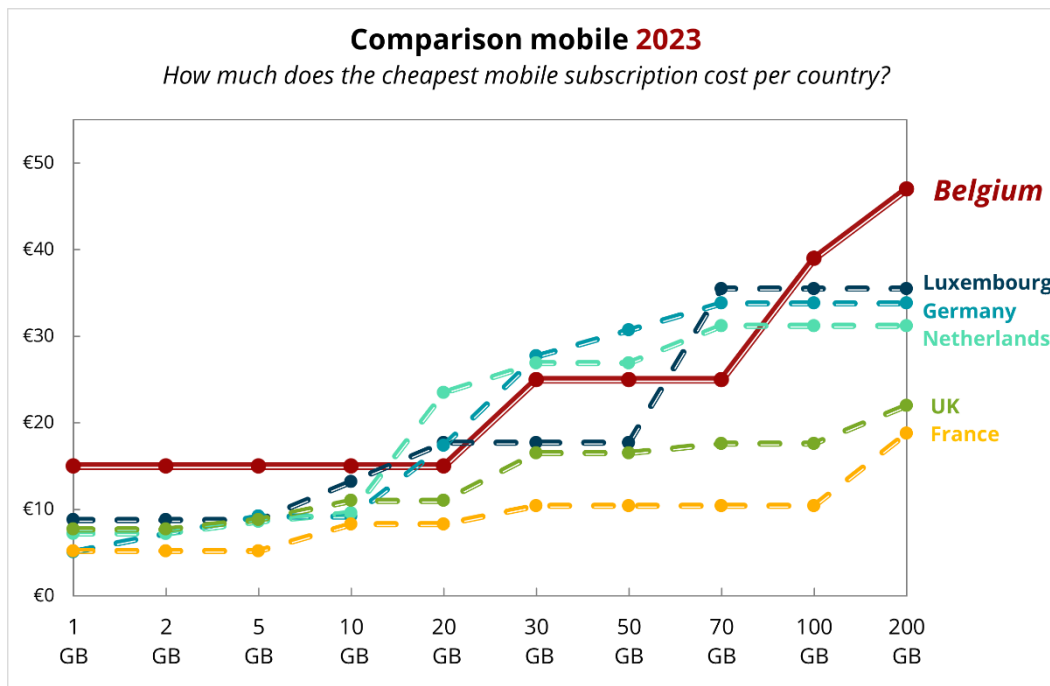


Figure 1. Price per month for the cheapest subscription, in purchasing power parity. October 2023.

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

² BIPT Council Communication of 3 October 2023 on the results of the benchmarking of mobile service tariffs in Belgium [Tariffs applied in Q3 2023]

- 10.1. In **Belgium** the prices for the smallest mobile subscriptions up to 10 GB tower above the rest.³ Belgium belongs to the middle bracket for medium-sized data volumes between 20 and 70 GB, for which the cheapest offer is consistently provided by Orange’s low-cost brand *hey!*. Consumers seeking 100 or 200 GB pay the most in Belgium by a wide margin.
- 10.2. Apart from Belgium, **Luxembourg** has the most expensive subscriptions for the lowest and the highest profiles. For the highest profile of 200 GB, however, Belgians still pay well over €11 more per month. Between 10 and 100 GB the prices in Luxembourg belong to the middle bracket.
- 10.3. **Germany** is characterised by significantly lower prices than Belgium for the lowest user profiles, although the prices quickly increase as the need for mobile data rises. For example, Belgian consumers who need between 30 and 70 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 rises rapidly and surpasses that of Belgium in the categories ranging from 20 to 70 GB.
- 10.5. **The United Kingdom** is significantly cheaper for all mobile profiles considered. Here too, the difference with Belgium for the very large volumes is very clear: for 200 GB the gap amounts to €25 a month.
- 10.6. 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. The biggest price gap with Belgium amounts to €28.6 a month for the 100GB subscription, or €343 annually.

2.2. Market dynamics and evolution

- 11. Mobile data usage keeps increasing, which has resulted in operators launching subscriptions with larger volumes. There appears to be a clear correlation between the price and the number of available providers in the evolution of this market segment. The table below shows how many brands offer a subscription that meets the requirements of intensive data users.

	50 GB	70 GB	100 GB	200 GB
Belgium	6	6	3	2
Luxembourg	4	4	4	4
Germany	4	4	3	3
The Netherlands	3	3	3	3
UK	6	6	6	5
France	7	7	5	5

Table 1. The number of brands offering a subscription that meets the requirements of the profiles.

³ 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 minutes.

- 11.1. The two cheapest countries, France and the United Kingdom, have the largest number of active brands by far in the higher data categories: between five and seven providers.
- 11.2. The countries in the middle bracket – Luxembourg, Germany and the Netherlands – have three or four.
- 11.3. The Belgian situation is a remarkable case due to the pronounced variation that can be found.
 - i. For instance, there are many brands active in the segment of the medium to large requirements of 50 and 70 GB, namely six. Apart from the main brands of operators Proximus, Orange/VOO and BASE/Telenet, this is indeed the playing field of the secondary brands hey! and Mobile Vikings. Belgium turns to be cheaper than the Netherlands and Germany for those profiles.
 - ii. However, for the largest data profile only two providers are available in Belgium, which is less than in any neighbouring country. The prices in Belgium happen to exceed those in the neighbouring countries for precisely the highest two profiles.

12. How has the market evolved in comparison with last year? Table 2 shows the price difference in euro purchasing power parity per profile. It is pointed out that the evolution is recorded *based on profiles* – 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	0	0	0	0	-10	0	-4	-14	-11	-3
Luxembourg	-9	-9	-9	-5	-9	-18	-18	0	0	0
Germany	0	-3	-3	-3	-10	-3	-5	-12	-12	-28
The Netherlands	0	-1	-1	0	6	1	1	5	5	5
UK	1	1	1	3	0	1	-1	0	0	0
France	-12	-12	-12	-8	-8	-6	-6	-6	-6	-2

Table 2. Price difference in euro PPP per month (October 2023 vs 2022). Rounded to one euro.

- 12.1. In **Belgium**, compared to last year, the minimum prices have not increased for any profile. The cheapest subscriptions that offer 20, 70 and 100 GB of mobile data, are respectively €10, €14 and €11 cheaper than in 2022.
- 12.2. In **Luxembourg** in the past year consumers having low to medium data needs could save €5 to €18 per month. The price of the big data volumes has not changed.
- 12.3. By contrast, in **Germany** the decrease of the minimum prices was most distinct for the highest data volumes. 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 not changed.

- 12.4. The **Netherlands** is the only neighbouring country where the highest data volumes have become more expensive. This is due to the disappearance of the Tele2 brand offer, which was the cheapest offer for the highest profiles last year. The offer disappeared after Tele2 and T-Mobile were consolidated under the new Odido brand.
- 12.5. In the **United Kingdom** the minimum prices for the lowest profiles were slightly raised. For consumers with the highest needs (≥ 50 GB) the minimum prices have remained constant.
- 12.6. In **France** subscriptions for the smallest consumption profiles were expensive last year, even slightly exceeding those in Belgium. The situation has changed in 2023 because of the increase in the number of call minutes and/or in the data volumes included in the subscriptions. As a result consumers in this country can now pay considerably less than a year ago for a similar use (€12 less for a consumption up to 5 GB).

2.3. Conclusion

13. As regards mobile subscriptions Belgium remains a very expensive country for basic needs and for the very extensive data volumes. In the middle bracket between 20 and 70 GB prices in Belgium are still in the medium group.

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 in each country, the cheapest bundle is selected, and adjusted according to Belgian 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 27 November 2023 on tariffs of fixed services and bundles.⁴

3.1. 2023 international benchmark

16. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries for October 2023. The profiles having a mobile component require each time 5 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.

⁴ BIPT Council Communication of 27 November 2023 on the benchmarking of the fixed service and convergent bundle rates on the residential market [Tariffs applied in Q4 2023]

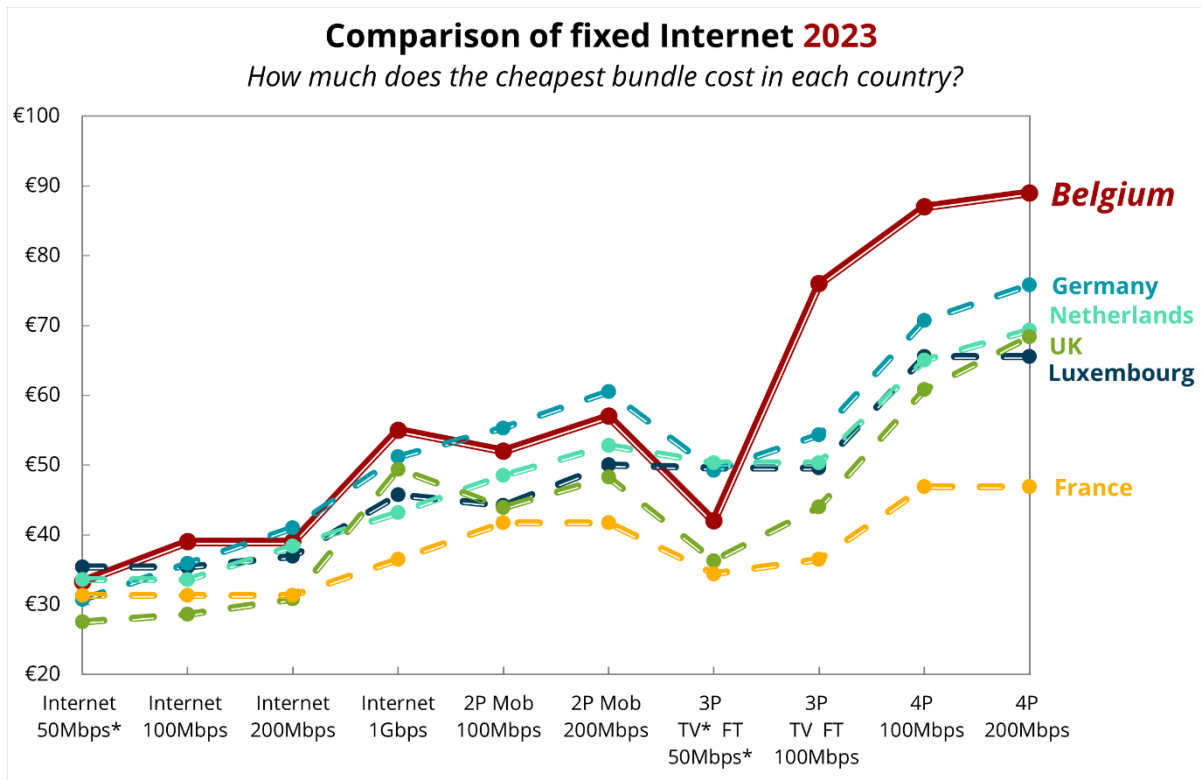


Figure 2. Price per month for the cheapest bundle or combination of subscriptions. In purchasing power parity, October 2023. *see § 16

17. How do the cheapest available prices in Belgium, expressed in purchasing power parities, relate to those in the neighbouring countries?

17.1. For almost all profiles **Belgium** belongs to the two most expensive countries. Especially for products containing a mobile component Belgium is expensive: in case of bundles with only Internet and mobile (2P) prices are rather high; in case of the largest bundles (4P) the gap between Belgium and the neighbouring countries is clear-cut.

An exceptional case is the fixed 3P profile with a minimum of 150 GB download volume, 30 TV channels, and a modest minimum speed of 50 Mbps. In this category, Scarlet positions itself as the most affordable brand and performs very well compared to neighboring countries. However, for the more extensive 3P bundle (unlimited download volume, 100 Mbps, and 50 TV channels), Scarlet does not provide an eligible bundle, making Belgium by far the most expensive country.

17.2. For most of the profiles **Luxembourg** is positioned round the centre, except for stand-alone low-speed Internet, where it is among the most expensive countries.

17.3. **Germany** is situated in the most expensive half of the six countries analysed. For a number of bundles the country is more expensive than Belgium, especially for the 2P bundles with Internet and mobile. Although Germany is also an expensive country for large bundles, Belgians still pay well over €13 more a month for the largest 4P bundle.

17.4. Along with Belgium and Germany, **the Netherlands** belongs to the most expensive half of the six countries analysed, even though it is not the most expensive country for any of the profiles.

17.5. **The United Kingdom** is significantly cheaper than Belgium for all profiles and is the cheapest country for stand-alone Internet up to 200 Mbps. By contrast, as for gigabit speed Internet, it is a relatively expensive country.

17.6. **France** is the cheapest country by far. The gap with Belgium is the biggest for the 4P bundle with 200 Mbps, where the difference is €42 a month.

3.2. Market dynamics and evolution

18. How has the market evolved in comparison with last year? Table 3 shows the price difference in euro purchasing power parity (euro PPP) per profile. It is pointed out 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 FT 50Mbps*	3P TV FT 100Mbps	4P 100Mbps	4P 200Mbps
Belgium	2	1	0	-18	2	0	2	5	6	8
Luxembourg	5	-2	0	0	-11	-5	-3	-3	-5	-5
Germany	0	0	0	0	7	7	8	8	9	9
The Netherlands	0	0	0	0	-1	-1	0	0	-1	-2
UK	6	4	-2	0	8	8	6	4	7	4
France	7	7	7	13	0	0	10	9	2	2

Table 3. Price difference in euro PPP per month (October 2023 vs 2022). Rounded to one euro. *see §16.

18.1. Compared to 2022 the amount to be paid in **Belgium** has risen for seven profiles, remained the same for two profiles and decreased for one profile. The price increases for the Belgian profiles are relatively uniform because all Belgian traditional operators raised one or more prices in the past year.

- i. The large price drop for gigabit Internet is thanks to the introduction of a fibre subscription from Mobile Vikings.
- ii. While BIPT noted in 2022 that the (limited) competitive dynamics in the mobile bundle segment were partly linked to the rise of Orange⁵, this effect seems to no longer be in play in 2023. After all, the operator implemented significant price increases this year.

18.2. In **Luxembourg** the minimum prices generally showed a downward trend. The decreases in price are most pronounced for convergent bundles. Only 50 Mbps stand-alone Internet increased in price.

⁵ BIPT Council Communication of 16 July 2022 on the evolution of the broadband and television markets in Belgium since Q1 2018.

- 18.3. In **Germany** significant price increases occurred for all bundles, but not for stand-alone Internet. They result from substantial price increases at O2, Deutsche Telekom and Vodafone.
 - 18.4. In **the Netherlands** the prices of the cheapest available bundle have hardly changed. Although T-Mobile was the cheapest provider for all profiles last year, the prices of the new brand Odido turn out to be in line. With regard to the 2P and 4P bundles, VodafoneZiggo has become the most affordable due to some product adjustments, resulting in a slight decrease compared to 2022.
 - 18.5. For a number of profiles **the United Kingdom** has become more expensive compared to last year, whereas gigabit Internet and bundles with mobile (2P and 4P) have become cheaper.
 - 18.6. Just like last year **France** is the cheapest neighbouring country. Nevertheless, we notice that profiles that only include fixed services have to pay significantly more (30% to 52%) than last year. Prices remain the same for the most part in case of bundles with a mobile subscription (2P and 4P).
19. Finally it should be pointed out that several price increases were introduced in Belgium last year, justified by the Belgian operators on the basis of **high inflation**. However, those price increases do not occur in the same way:
- 19.1. On the mobile market the price does not go up for any profile and there are even decreases for certain profiles. Although the prices were sometimes raised for existing mobile subscriptions, this nearly always happened as part of a more for more approach, whereby data volumes also increased. It seems like operators felt obliged to offer their customers some compensation.
 - 19.2. By contrast, as for fixed Internet and bundles most prices went up without any clear improvements in the characteristics. The shift in Orange's position from a challenger to an established player in the fixed market is illustrated by its price increases in 2023. This change has contributed to a reduction in competitive dynamics in this segment.
 - 19.3. The difference between the mobile market and fixed bundles can, at least in part, be explained by the fact that consumers are quicker to switch operators with a standalone product compared to a bundle⁶, and in 2024, a fourth operator will enter the mobile market. The potential launch of bundles with fixed Internet by the fourth mobile operator DIGI could also lead to a revival in the competition dynamics on the fixed market

⁶ BIPT Council Communication of 9 June 2023 on the status of the electronic communication and TV market (2022).

4. Conclusion

20. As regards mobile subscriptions Belgium remains a very expensive country for basic needs and for very extensive data volumes. In the middle bracket between 20 and 70 GB prices in Belgium are still average.
21. As for fixed subscriptions and bundles the relation between prices in Belgium and those abroad has largely remained the same compared to last year. It turns out that:
 - 21.1. Belgium remains notably more expensive for every consumer profile than France and the United Kingdom, which are by far the cheapest countries in this study.
 - 21.2. Belgium remains reasonably affordable for limited triple play needs (30 TV channels, 50 Mbps download speed and fixed telephony) thanks to Scarlet's offer.
 - 21.3. For stand-alone Internet or Internet in a bundle with mobile Belgium is still in line with the Luxembourg and Germany, but becomes increasingly more expensive than the same countries as the needs to be fulfilled go up.
22. In the context of high inflation, operators have made one or more adjustments to their offerings over the past year. In Belgium, the mobile market generally experienced a 'more-for-more' approach, where both the price and the amount of gigabytes increased.
23. In both Belgium and its neighboring countries, prices for fixed Internet and bundled offerings generally increased in the past year. On the one hand, Belgium has moved slightly closer to the average of the neighboring countries for certain profiles (mainly 1P and 2P), but the gap for profiles with greater needs (3P and 4P) remains significant.
24. The difference in market dynamics between the mobile and fixed markets is partly due to higher churn rate in standalone mobile subscriptions than in bundles and the expected entry of the fourth mobile operator in 2024. Orange shifting from a challenger position to an established player has also contributed to a decrease of competition dynamics on the fixed market. This is apparent from the fact that, like other traditional operators, it significantly increased its prices in 2023. The potential launch of bundles with fixed Internet by fourth mobile operator DIGI could lead to a revival of competitive dynamics in the fixed market.

Axel Desmedt
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Michel Van Bellinghen
Chairman of the Council

Annex 1. Methodology

25. The international comparison discussed by the BIPT in this report follows the same method as the one used in the December 2022 study.⁷ This annex repeats the main characteristics of that method.
26. The comparison concerns the nominal prices of fixed, bundled and mobile residential telecom services in six countries: Belgium, Germany, France, Luxemburg, the Netherlands and the United Kingdom. The data used for this comparison were collected in October 2023. 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").
27. As in 2022 the 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.
28. 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.
29. 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).
30. This report also focuses on the way in which the results of the comparative analysis have evolved over the past year. For a detailed situation in each country and the analysis of possible explanations for the differences found, we refer to the study published in December 2022⁸, as the main part of its conclusions and findings are still up-to-date.
31. 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 below⁹.

⁷ See: BIPT Council Communication of 14 December 2022 regarding the comparative study on the price level of telecom products in Belgium and in the neighbouring countries.

⁸ Ibidem

⁹ 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 ¹⁰ [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 [20-30%] Vodafone/HollandseNieuwe [20-30%] T-Mobile/Tele2/Simpel ¹¹ [30-40%]
The United Kingdom	BT O2/Virgin Media Sky TalkTalk Vodafone Three	BT/EE [30-40%] Virgin Media [10-20%] Sky [20-30%] TalkTalk [10-20%] Vodafone [<10%] Three [<10%]	EE/BT [20-30%] O2/Tesco M/Virgin [30-40%] Sky Mobile [<10%] - Vodafone [10-20%] Three [10-20%] ¹²

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)

32. 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 2022).
33. 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 2% of connections at the end of 2022).

¹⁰ In the meantime VOO and Zuny have been taken over by Orange.

¹¹ In the meantime the brands T-Mobile and Tele2 have merged to become Odido.

¹² In the meantime Vodafone has acquired a majority share in Three.

34. In the 2023 study the same mobile profiles as those in the 2022 study have been maintained. One (bundle) profile has been changed (2P BB FT has been replaced by 1P Internet with 1 Gbps download speed). The purpose was to represent the growing offer of 1P Internet products with a high download speed and the dwindling demand for fixed telephony. In any case the 2022 results used in this study have been re-calculated in order to take account of those adjustments. By doing so the comparison between the various years remains correct.

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	-