

**Communication of the BIPT Council
of 15 December 2025
regarding the comparative study on the prices of
telecom services in Belgium and in the neighbouring
countries [Tariffs of October 2025]**



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1. Executive summary

1. Every year the BIPT compares the prices of telecom services in Belgium and its neighbouring countries. The last time this comparison was made was in December 2024.¹ The results of this year's study, which are based on tariff plan information collected in October 2025, are summarised and compared below to those of the previous edition.
2. In 2024, the BIPT concluded that our country was very expensive in terms of prices for the smallest mobile subscriptions with a data limit of up to 10 GB, but that prices for larger data needs were more competitive. For data needs from 30 to 70 GB Belgium is even the cheapest after France.
3. One year later, the BIPT notes that Belgium is no longer an outlier for the smallest mobile subscriptions and is now in the middle bracket. In addition to an improvement in the dynamics for this segment, this is now also the case for highly data-intensive subscriptions. This is driven by the entry of secondary brands such as BASE, Mobile Vikings and hey! in this segment, which has led to a more competitive position of our country vis-à-vis its neighbours.
4. As for fixed Internet and bundles, it can be concluded just like last year that Belgium generally belongs to the most expensive half of the neighbouring countries, with the exception of the low requirement profiles. For the heaviest bundles, which are most popular among Belgian consumers, Belgium is by far the most expensive.
5. The mobile and fixed market showed different competitive dynamics over the past year. When looking at the full offer and not just the minimum prices, it can be noted that on the mobile market, the prices of the subscriptions of the main brands remained generally stable and only slightly increased in a few cases. However, for several profiles, the minimum price fell, mainly because secondary brands significantly increased their data volumes included in existing subscriptions and are now also active in the segment of highly data-intensive subscriptions. On the fixed market, the BIPT finds that the prices of most fixed Internet subscriptions and bundles have increased over the past year, generally without any substantial improvement in characteristics. This applies to all main brands, while the prices of the secondary brands remained almost stable.
6. The difference in dynamics between the mobile market and the fixed bundles market can partly be explained by the fact that consumers are quicker to switch operators in case of a (mobile) stand-alone product than in case of a bundle. In addition, the dynamics on the mobile market are influenced by the arrival of a fourth operator, DIGI, at the end of 2024. On the fixed market, this has not yet had any effect, as DIGI's fixed offer is currently only available in a limited number of municipalities. In the long term, however, this has the potential to revive the competitive dynamics on the fixed market.
7. It also turns out that a country where prices are high does not necessarily have a better network quality. In case of both mobile and fixed networks a clear link between price and quality is missing. In France and the Netherlands, it appears that high quality and competitive prices do not have to be mutually exclusive for fixed networks.

¹ [Communication of 17 December 2024 regarding the comparative study on the prices of telecom products in Belgium and in the neighbouring countries in 2024 \[Tariffs of October 2024\] | BIPT](#)

2. Mobile subscriptions

8. In this chapter the prices of mobile subscriptions in Belgium are compared to those in the neighbouring countries. For each consumer profile the cheapest subscription is selected per country and adjusted according to euro purchasing power parity. This study only focuses on operators with more than 5% market share, as well as their secondary brands, if any. A brief description of the methodology can be found in Annex 1. The profiles have different data needs and each requires at least 200 text messages and 1 000 call minutes.
9. It is important to note that DIGI, the new operator which entered the market last year (December 2024), does not yet meet the market share criterion and its prices have therefore not been included in this analysis, in accordance with the methodology. There are many other Belgian market players who also do not meet this criterion. A complete list of mobile operators can be found on the BIPT's website.²
10. This study focuses on the comparison between prices in Belgium and those in the neighbouring countries. An extensive analysis focusing on the price evolutions of all mobile operators in Belgium and on how consumers can save money can be found in the BIPT Communication of 27 May 2025 on tariffs of mobile services.³

2.1. 2025 international benchmark

11. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries for October 2025.

² [List of mobile operators | BIPT](#)

³ [Results of the benchmarking of mobile service rates in Belgium \[Tariffs applied in Q2 2025\] | BIPT](#)

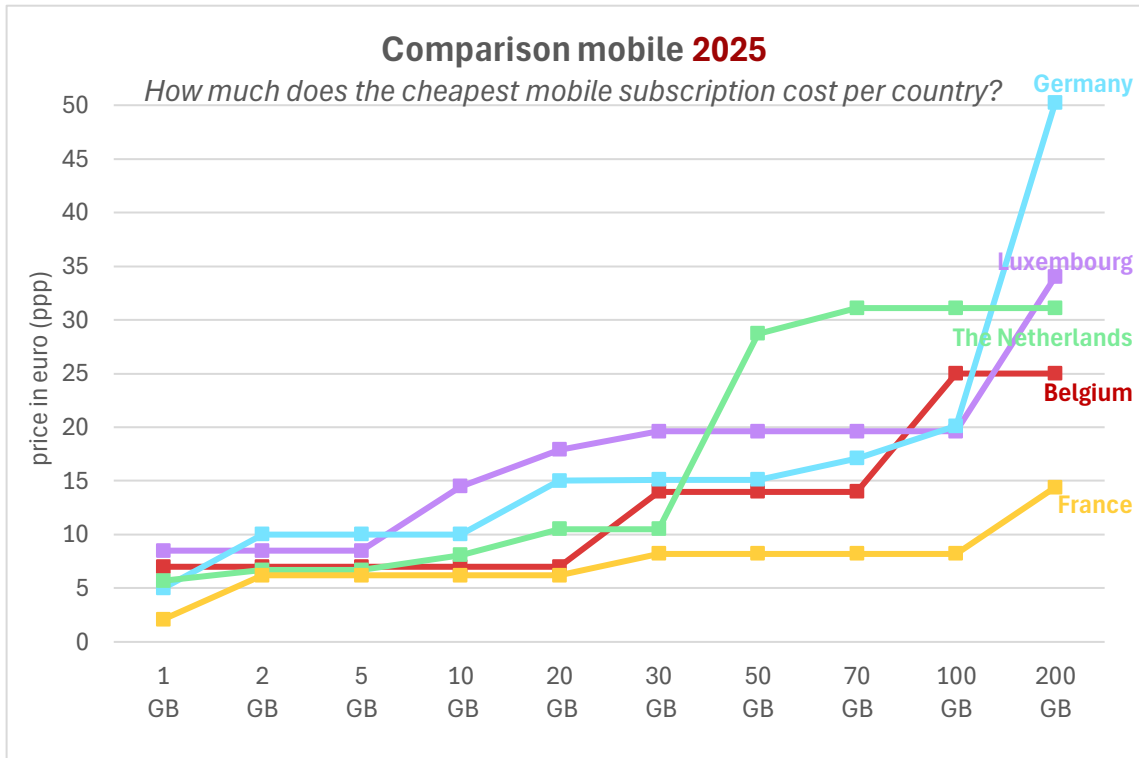


Figure 1. Price per month for the cheapest subscription, in purchasing power parity. October 2025.

12. How do the prices of the cheapest mobile subscriptions in Belgium relate to those in the neighbouring countries?

12.1. In **Belgium** the prices for the smallest mobile subscriptions (up to 5 GB) belong to the middle bracket. For medium data needs (10 to 20 GB), only France is cheaper. For larger data needs (30 to 70 GB), the gap with France is widening, but Belgium remains among the cheaper countries. Regarding the largest data needs, the picture is mixed. For 100 GB, our country is the second most expensive. And for 200 GB, Belgium positions itself as the second-cheapest country.

12.2. **Luxembourg** is relatively expensive for the small profiles up to 5 GB and even the most expensive for the medium profiles up to 30 GB. For the following profiles, Luxembourg remains more expensive than Belgium, with the exception of the profile with a data need of 100 GB, for which it is more than €5 per month cheaper than Belgium. For the heaviest profile (200 GB), the roles are reversed and Luxembourg is again significantly more expensive than Belgium.

12.3. **Germany** is in the more expensive half for data needs up to 30 GB. For data limits from 50 to 100 GB, the price level is in the middle bracket. For the largest profile of 200 GB, Germany ends up as the most expensive by a wide margin, while a Belgian consumer only pays half for the same profile.

12.4. **The Netherlands** are in the middle bracket regarding prices for data needs up to 30 GB. For the medium data needs (50 to 100 GB) they are significantly more expensive

than the rest. The gap with our country is the greatest for the profile with 70 GB data: a Dutch consumer pays twice as much for this as a Belgian one. For the highest profile with 200 GB, the Netherlands are once again in the middle bracket.

- 12.5. **France** has the lowest prices for all profiles and is significantly cheaper than in the other countries examined in this study, particularly for data needs of 50 GB or more. For the lowest profile (1 GB) Belgium is more than three times as expensive as France, the price difference amounting to almost €5 a month. The biggest gap with Belgium is almost €17 a month for the subscription with minimum 100 GB data, which amounts to an annual difference of more than €200.

2.2. Market dynamics and evolution

13. The table below shows per country how many brands offer a subscription that meets the requirements of data users. Only the profiles for which there were significant shifts compared to 2024 are shown here.

| | 5 GB | 70 GB | 100 GB | 200 GB |
|------------------------|--------|--------|--------|--------|
| Belgium | 9 (+1) | 8 (+1) | 8 (+2) | 8 (+4) |
| Luxembourg | 4 | 4 | 4 | 4 |
| Germany | 6 | 6 (+2) | 6 (+2) | 3 |
| The Netherlands | 7 | 4 | 4 | 4 |
| France | 7 | 7 | 7 | 6 |

Table 1. The number of brands offering a subscription, per profile (2025); the difference with 2024 is shown in brackets.

- 13.1. In **Belgium**, the evolution regarding the heaviest profile of 200 GB is remarkable. Until 2023, only two brands were active in our country with such a subscription (only Orange and Proximus). Over the past two years, more brands have started to compete for the biggest data users: since 2024, Telenet and VOO have also introduced such subscriptions and, in 2025, secondary brands BASE, Mobile Vikings and hey! followed. In addition, TADAAM extended its services with a mobile offer. Thus, Belgium now has eight providers in this segment, the highest number compared to our neighbouring countries. For the moment only Scarlet does not aim for that segment. The following section shows that the increased competitive dynamics for the heaviest profiles led to the greatest price drop (see Table 2 below).
- 13.2. In **Luxembourg**, the number of providers has remained constant for all profiles.
- 13.3. In **Germany**, the 70 GB and 100 GB profiles are subject to increased dynamics. The secondary brands, which used to focus exclusively on lower data needs, are now also active in the segment of more data-intensive users. However, for the highest profile with at least 200 GB, they do not have an offer yet.
- 13.4. In **the Netherlands**, the number of providers for all profiles has remained unchanged. The secondary brands still focus exclusively on lower data needs, while the largest data packages are only offered by the main brands.

13.5. **France**, the cheapest country by far, had the largest number of active brands until last year. Both the main brands (Bouygues, SFR, Orange and Free) and their secondary brands (Sosh, NRJ Mobile, Red-by-SFR) offer subscriptions up to 100 GB. As in Luxembourg and the Netherlands, the number of providers in France has remained constant.

14. How has the market evolved in comparison with one year ago? Table 2 shows the price difference in euro purchasing power parity (euro PPP). Note that evolution is recorded *per profile*. The price differences may be due to the introduction of new subscriptions, changes in the price of existing subscriptions, or an increase of the data volumes of subscriptions – which previously belonged to a lower profile – so that they 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 | -7 | -7 | -7 | -7 | -7 | 0 | 0 | 0 | 0 | -14 |
| Luxembourg | 0 | 0 | 0 | 0 | -2 | 0 | 0 | 0 | 0 | 0 |
| Germany | -5 | 0 | 0 | 0 | 0 | -5 | -15 | -18 | -15 | 0 |
| The Netherlands | -1 | 0 | -1 | 0 | -1 | -16 | +2 | 0 | 0 | 0 |
| France | 0 | +4 | +3 | +1 | +1 | +2 | 0 | 0 | 0 | +3 |

Table 2. Price difference in euro PPP per month (October 2025 vs 2024). Rounded off to one euro.

14.1. In **Belgium** the minimum prices have not increased for any profile. For profiles up to 20 GB there is a significant decrease of €7 per month for the cheapest subscription available compared to the previous year. This is due to a change in the mobile offer of hey!, with more call minutes and text messages included in the subscription, which means that this product now meets the minimum requirements of the profiles in question. For subscriptions with at least 200 GB, the savings even reach €14, as secondary brands BASE, MOBILE Vikings and hey! have also become active in this segment.

14.2. In **Luxembourg**, almost nothing changed in the past year, except for the profile with a data need of 20 GB. A change in Tango's offer now allows consumers in this segment to save €2 per month.

14.3. In **Germany**, there was a decrease for the lowest profile (1 GB) on the one hand and for the profiles with data needs from 30 to 100 GB on the other hand. The decrease in minimum prices was most pronounced for the 50, 70 and 100 GB profiles. These have become €15 to €18 cheaper. This development is due to the fact that secondary brands Congstar and Simon are now also targeting customers with higher data needs (see Table 1).

14.4. In **the Netherlands**, the changes remained relatively limited, although there is one notable change for the profile with a data need of 30 GB. For this profile, a consumer can now find a subscription that is €16 cheaper than last year's cheapest offer. This decrease is due to the fact that secondary brands Youfone and Simpel are now active in this segment.

14.5. **France** was by far the cheapest country for mobile subscriptions last year and maintains its leading position in 2025. On the other hand, however, it is the only country in the comparison where the minimum prices have increased for several profiles. This is

entirely the result of shifts in the offer of certain operators. The prices for these profiles have increased slightly, but this is offset by a larger data volume. Consumers with a lower data requirement (< 30 GB) are penalised.

2.2.1. Influence of a new market player on the dynamics in the Belgian mobile market

15. On 11 December 2024, DIGI, the fourth national network operator, launched its mobile offer, with a competitively priced subscription of €5 per month for unlimited calls and text messages and 15 GB of data. The launch caused significant shifts in the Belgian mobile market. Within a few weeks, the incumbent operators responded as follows:
 - 15.1. Orange immediately modified the subscriptions of its secondary brand hey!. Customers have received unlimited call minutes and text messages and more data. In addition, the price of the cheapest subscription was reduced. These adjustments immediately brought hey! on par with DIGI's offer and also offered 5G connectivity.
 - 15.2. Proximus doubled via Mobile Vikings the data limits of existing subscriptions with no price increase. Scarlet's offer was also extended with more mobile data.
 - 15.3. Telenet also increased the data limits of its secondary brand BASE without increasing the price.
16. The competitors' reactions were thus limited to the secondary brands. The subscriptions of the main brands remained largely unchanged or even increased in price.
17. A year after the launch, we can see that the impact of DIGI on the market is still present, but that the competitive offers have been weakened somewhat. For example, the €5 entry-level subscription of hey! is no longer available on the market. The other operators have regularly increased the data volumes of certain subscriptions, which means that consumers get better value for money.
18. The offer of DIGI itself has also changed in the meantime. The operator now offers three subscriptions, the cheapest of which costs €3 for 5 GB. The other two 20 GB and 30 GB subscriptions cost €5 and €7 respectively. Whereas unlimited calls and text messages to all networks used to be included, this now only applies to text messages to other DIGI numbers, and unlimited calls in the cheapest subscription are only included for calls to DIGI numbers. Traffic to other networks is subject to an additional fee.
19. The entry of the fourth operator and the associated increased dynamics in the mobile market have in any case led to a reduction in the minimum prices compared to the previous year for consumers with data needs up to 20 GB (see Table 2).

2.3. Conclusion

20. In 2024, the smallest subscriptions up to 10 GB were considerably more expensive in Belgium than in neighbouring countries. A year later, competition in this segment has significantly increased, bringing tariffs in line with those in neighbouring countries. Belgium is therefore no

longer a negative outlier for the smallest mobile subscriptions and is now in the middle bracket. The entry of DIGI has played an important role in this.

21. For profiles with data needs of 30, 50, 70 and 100 GB, there is no change in Belgium compared to last year, while for example Germany has become significantly more competitive in this segment.
22. For the profile with the highest data need (200 GB), Belgium was still among the more expensive half of the countries last year, but is now among the cheaper ones. This improvement is mainly due to the increase in the number of providers, with secondary brands in particular now also targeting very intensive data users.

3. Fixed Internet and bundles

23. In this chapter the prices of fixed subscriptions and bundles in Belgium are compared to those in the neighbouring countries. For each consumer profile, per country, the cheapest bundle is selected, and adjusted according to euro 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 having a market share of more than 5% are discussed, including their secondary brands, if any. A brief description of the methodology can be found in Annex 1.
24. 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 20 November 2025 on tariffs of fixed services and bundles.⁴ Also relevant in this context is the BIPT Communication of 24 April 2024, mapping the evolution of residential prices of fixed Internet and bundles since 2019.⁵
25. On 1 October 2025, Orange Belgium completed the final step in the acquisition of VOO. The VOO brand will gradually be integrated in the future.

3.1. 2025 international benchmark

26. The figure below compares the cheapest available offers in Belgium with those in the neighbouring countries based on the October 2025 prices. The profiles with a mobile component require each time 10 GB, 200 text 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 a decoder and 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 [Communication of 20 November 2025 on the benchmarking of the fixed service and convergent bundle rates on the residential market tariffs applied in Q3 2025 | BIPT](#)

⁵ [Communication of 24 April 2024 on the evolution of the price of fixed and convergent residential telecom services over the past five years \(from 2019 to 2024\) | BIPT](#)

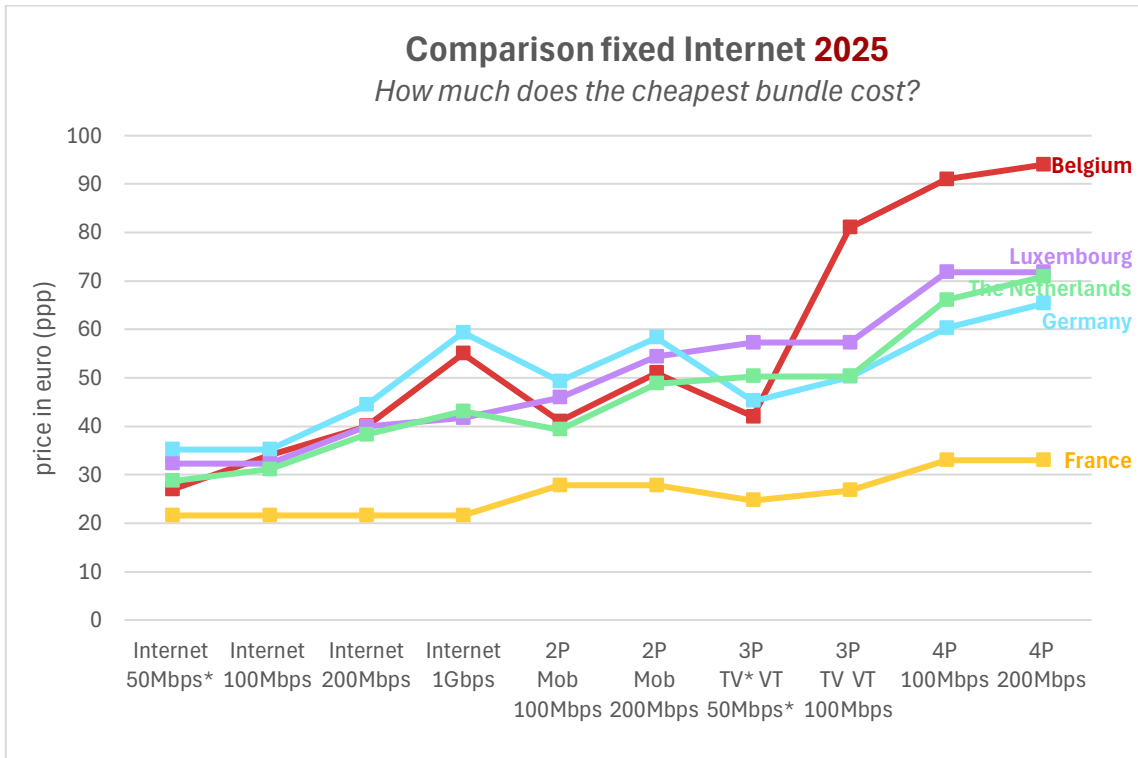


Figure 2. Price per month for the cheapest fixed services (stand-alone Internet and bundles), in purchasing power parities. October 2025. *See paragraph 16

27. How do the cheapest available prices in Belgium relate to those in the neighbouring countries?

27.1. **Belgium** generally belongs to the most expensive half of the countries examined for the different profiles. Especially for the heaviest bundles, which are most popular among Belgian consumers, Belgium is by far the most expensive.

- i. Belgium is situated in the middle bracket for stand-alone Internet with 200 Mbps. For 100 Mbps and 1 Gbps only Germany is more expensive.
- ii. For a basic stand-alone Internet subscription of minimum 50 Mbps and 150 GB download volume, Belgium is cheap. Until 2023, Belgium was still part of the more expensive half of the comparison, but since the introduction of BASE's Internet subscriptions in 2024, Belgium has been more competitive for this profile. It is important to note that the practice of operators offering subscriptions with a limited download volume is only seen in Belgium anymore.
- iii. Belgium is in the middle bracket as regards 2P bundles that combine the Internet with a mobile subscription of at least 10 GB. Germany and Luxembourg are more expensive, while the Netherlands and France are cheaper. This applies to download speeds of 100 and 200 Mbps.
- iv. Fixed 3P bundles including Internet, television and fixed telephony show a strong dichotomy. If the requirement is 50 Mbps and a limited TV subscription of at least 30 channels, Scarlet's subscription is an option, the price of which is below those in Germany, Luxembourg and the Netherlands. However, when a

larger TV offer (at least 50 channels) is required, Belgian prices are significantly higher than those in all neighbouring countries, as Scarlet does not have an offer that meets these requirements for this profile.

- v. Belgium is also the most expensive by far regarding 4P bundles, with a price difference of up to about €20 per month compared to the second most expensive country, Luxembourg. Compared to the cheapest country, France, this difference even reaches about €60 per month.

- 27.2. As far as stand-alone Internet is concerned, **Luxembourg** is situated in the middle bracket, but for bundles it is often the most or second most expensive country.
- 27.3. In **Germany** prices for stand-alone Internet, especially for gigabit speeds, are relatively high. Prices are also high for 2P bundles. For 3P bundles, Germany is in the middle bracket. And for 4P bundles it is even the cheapest, second only to France.
- 27.4. For stand-alone Internet subscriptions and 2P bundles, the **Netherlands** often come out as the second cheapest neighbouring country. For 3P and 4P bundles the Netherlands are in the middle bracket.
- 27.5. **France** is the cheapest country by far. The gap with Belgium is the biggest for the 4P bundles with a 200 Mbps download speed, where the difference is over €60. On an annual basis such a Belgian profile pays €730 more than the French counterpart.

3.2. Market dynamics and evolution

- 28. Unlike the mobile market, where the number of players has increased significantly in recent years, there is no significant change in the number of active providers within the fixed segment.
- 29. How has the market evolved in comparison with one year ago? Table 3 shows the price difference in euro purchasing power parity (euro PPP). Note that the evolution is recorded *per profile*, thus changes can be due to the introduction of new subscriptions, price changes of existing subscriptions or an increase of the data volumes of subscriptions – which previously belonged to a lower profile – so that they now meet the requirements of a higher profile.

| | Internet 50 Mbps* | Internet 100 Mbps | Internet 200 Mbps | Internet 1 Gbps | 2P Mob 100 Mbps | 2P Mob 200 Mbps | 3P TV FT 50 Mbps* | 3P TV FT 100 Mbps | 4P 100 Mbps | 4P 200 Mbps |
|------------------------|----------------------|----------------------|----------------------|--------------------|--------------------|--------------------|----------------------|----------------------|----------------|----------------|
| Belgium | 0 | 0 | 0 | 0 | -7 | +3 | 0 | +17 | +14 | +17 |
| Luxembourg | 0 | 0 | -2 | 0 | -6 | -1 | +3 | +3 | +2 | +2 |
| Germany | 0 | 0 | +4 | -1 | -1 | +3 | 0 | 0 | -5 | -5 |
| The Netherlands | 0 | 1 | -6 | -7 | 1 | -3 | +8 | 1 | +9 | 1 |
| France | -4 | -4 | -4 | -9 | -4 | -4 | -4 | -4 | -2 | -2 |

Table 3. Price difference in euro PPP per month (October 2025 vs 2024). Rounded off to one euro. *See paragraph 16.

- 29.1. Compared to 2024, the lowest prices for stand-alone Internet in **Belgium** remained unchanged. However, for the heavier bundles, the minimum prices have significantly increased.

- i. Last year VOO offered the cheapest convergent 2P subscription for the 100 Mbps and 200 Mbps profiles. This is no longer the case for both profiles this year due to large price increases applied by VOO.⁶ As a result, the Belgian price for the 2P subscription including 200 Mbps this year is higher than last year, while the price for the 2P subscription including 100 Mbps has become cheaper due to changes in the offer of hey!.
 - ii. Also for the 3P 100 Mbps and 4P subscriptions, the VOO offers that were the cheapest in 2024 have become significantly more expensive, making these profiles more expensive for our country than in the previous year.
- 29.2. For **Luxembourg**, the BIPT noted in 2024 that minimum prices generally evolved upwards. This year, there is no clear trend in minimum prices. Prices for 2P Internet subscriptions and 200 Mbps stand-alone Internet dropped, due to new or extended offers. For the 3P and 4P profiles, the minimum price increases by €2 to €3. This is due to price increases from Lux Online.
- 29.3. In **Germany**, minimum prices remained fairly stable. For stand-alone Internet with 200 Mbps and 2P 200 Mbps, there was a small price increase due to price increases from Freenet and Vodafone. Prices dropped only for the 4P bundles. O₂ takes over from Vodafone as the cheapest provider.
- 29.4. In **the Netherlands**, minimum prices for 200 Mbps and 1 Gbps fell as a result of price reductions from Odido. Youfone's 2P Internet subscription also became cheaper. In 2025 Youfone stopped offering fixed telephony with new subscriptions. As a result, the brand is no longer eligible for the 3P and 4P profiles, where it was the cheapest last year. As a result, Odido is now the cheapest provider for those profiles. Although their subscriptions for 3P 50 Mbps and 4P 100 Mbps are respectively €8 and €9 more expensive than the Youfone offers of 2024.
- 29.5. Last year **France** already was the cheapest neighbouring country by far. Competition continues to play unabated and the lowest possible amount one has to spend to meet the requirements, dropped for each profile. The price reductions are mainly due to the price reductions of the stand-alone Internet subscriptions, which subsequently also permeate into the prices of bundles.
30. The BIPT notes that the mobile and fixed markets in Belgium were marked by different competition dynamics in the past year. On the mobile market competition increased, focusing especially on the segment with the highest needs, because more and more providers launched intensive-use products. On the fixed market, however, there were no new launches. When looking further than only the minimum prices and considering the entire offer, the following factors may explain that situation:
 - 30.1. On the mobile market, the prices of the subscriptions of the main brands have remained stable and in some cases slightly increased. Nevertheless, the minimum price dropped for various profiles, mainly because secondary brands implemented significant increases

⁶ During the previous data collection in October 2024, some VOO subscriptions had recently been significantly reduced in price. Despite the communication received at the time by the BIPT, indicating that these reductions would be lasting, it was subsequently found that this was not the case.

in data volume for existing subscriptions and are now also active in the highly data-intensive subscriptions segment.

- 30.2. On the fixed market, the minimum amount that has to be paid in Belgium especially for the largest bundles has significantly increased compared to 2024, as shown in Table 3. When not only the cheapest option is considered, the BIPT finds that the prices of most fixed Internet and bundle offers continued to increase in the last year, without any clear improvement in the characteristics. This is true for all main brands, while prices for secondary brands have remained almost stable. The largest increases have been recorded with VOO. As a result, in Belgium, the minimum prices for the heaviest bundles rose to levels well above those of neighbouring countries. The BIPT can only conclude that the competition dynamics in this segment have not improved.
- 30.3. The difference in dynamics between the mobile and fixed market can – at least partially – be explained by the fact that consumers switch operators more quickly in case of a stand-alone product compared to a bundle. The shifts on the mobile market are also the consequence of the market entry of the fourth operator DIGI at the end of 2024. On the fixed market, this has not yet had any effect, as DIGI's fixed offer is currently only available in a limited number of Brussels municipalities. However, this has the potential to eventually revive the competitive dynamics on the fixed market.

3.3. Conclusion

31. With the exception of the stand-alone Internet basic profile requiring a minimum speed of 50 Mbps and a download volume limited to 150 GB – for which the product taken into consideration for Belgium is in fact not comparable in an international context, since in the neighbouring countries only unlimited Internet is offered – Belgium belongs to the more expensive countries when it comes to stand-alone Internet. For gigabit Internet our country is typified as very expensive, and is only preceded by Germany.
32. Belgium is in the middle bracket as regards the 2P bundle that combines the Internet with a mobile subscription of at least 10 GB. Germany and Luxembourg are more expensive, while the Netherlands and France are cheaper. As for the lighter fixed 3P bundles that include Internet, TV and fixed telephony (50 Mbps and a limited TV subscription of 30 channels minimum) the price is good, even cheaper than those in Germany and the Netherlands. Regarding the heavier 3P bundles with a minimum download speed of 100 Mbps and at least 50 TV channels the price in Belgium towers above that of all other neighbouring countries. The same applies to 4P bundles.
33. The increases in VOO prices have had a significant impact on the results for Belgium. After a positive evolution of the prices for the heaviest bundles towards the prices of neighbouring countries, Belgium towers again above the rest.
34. Taking account of the above it can be concluded that Belgium can still be considered as rather expensive to very expensive for the fixed Internet and bundle segment, with the exception of the two low-requirement profiles.

4. Network quality

35. The explanation often given for the difference in tariff levels between Belgium and its neighbouring countries concerns the degree of competition and the network quality. The competitive dynamics in Belgium have already been discussed above. In this section we examine whether a link could exist between the network quality and the price level in a country.

36. As far as the mobile network quality is concerned, two sources give a mixed image. The country qualified in this study as the cheapest one in terms of mobile services – France – does not perform too well regarding download speed in the studies about the quality of the mobile networks. By contrast, the Dutch networks are among the best in Europe. The mobile download speed in Germany turns out to be low in an international context, and certainly in comparison with the other countries in the study, and yet the prices are not among the cheapest ones. Belgium performs better than Germany when it comes to download speed, but less so than other countries in the study. As regards mobile video experience, there are no significant differences between Belgium and its neighbours.

| | Price level of mobile subscriptions (BIPT study) | Indicators | | | |
|--------------------|--|--|------------------|---|------------------|
| | | Mobile download speed (Mbps, 107 countries) ⁷ | | Mobile video experience (% , 85 countries) ⁸ | |
| 1. France | Cheap | 132 | 26 th | 70 | 29 th |
| 2. The Netherlands | Rather cheap to expensive | 164 | 12 th | 75 | 3 rd |
| 3. Luxembourg | Rather expensive to expensive | 143 | 19 th | <i>Not available</i> | |
| 4. Belgium | Rather cheap | 111 | 39 th | 71 | 23 rd |
| 5. Germany | Rather expensive to expensive | 72 | 66 th | 68 | 34 th |

Table 4. Comparison between price level and network quality for mobile services.

37. The overview above by no means gives an exhaustive picture of the general network quality. In any case, it cannot be demonstrated that there is a clear link between the quality of mobile networks and the price level based on the indicators mentioned above, for example the existence of high prices which could be justified by high network quality. In addition the price level is not clear either – with the exception of France. A correlation (not to mention a causal connection) between the quality of the mobile networks and the price difference between the countries studied therefore seems difficult to establish at first sight.

38. Concerning the quality of the fixed networks the observations made by various sources are summarised in the table below.

⁷ The results of Speedtest.net refer to September 2025. (source: [Speedtest](#))

⁸ Mobile video experience measures the quality of videos streamed to devices by way of mobile data, based on factors such as image quality, download time and interruptions. A country's score is the highest score obtained by an operator in that country. That is also how the ranking has been established. (source: [Opensignal](#))

| | Price level of stand-alone Internet and bundles (BIPT study) | Indicators | | | | | |
|--------------------|--|---|------------------|--|------------------|--|------------------|
| | | VHCN broadband coverage (% , 28 countries) ⁹ | | FTTH/B coverage (% , 28 countries) ¹⁰ | | Download speed (Mbps, 154 countries) ¹¹ | |
| 1. France | Cheap | 87 | 12 th | 87 | 6 th | 316 | 5 th |
| 2. The Netherlands | Rather cheap | 98 | 2 nd | 85 | 10 th | 213 | 25 th |
| 3. Germany | Rather cheap to expensive | 77 | 21 st | 37 | 27 th | 100 | 60 th |
| 4. Luxembourg | Rather cheap to rather expensive | 95 | 5 th | 82 | 11 th | 194 | 31 st |
| 5. Belgium | Rather expensive to expensive | 94 | 8 th | 31 | 28 th | 126 | 51 st |

Table 5. Comparison between price level and network quality for fixed broadband Internet services.

39. For the fixed segment, there also appears to be no correlation between price levels and network quality across all countries. France is the cheapest throughout while the quality indicators are among the best. The Dutch network has good quality too compared to other countries included in this study, even if that country can be qualified as rather cheap. Luxembourg has good broadband and FTTH coverage, but prices are rather expensive there. Broadband coverage (VHCN) in Belgium is excellent, but for FTTH roll-out our country is lagging behind. The download speed observed is the second lowest out of the five countries. Also for the fixed segment the price is not unequivocal either – with the exception of France. A correlation between the quality of the fixed networks and the price difference between the countries studied also seems difficult to establish at first sight. The examples of France and the Netherlands show that high quality and competitive prices do not have to be mutually exclusive.

Bernardo Herman
Member of the Council

Peggy Valcke
Member of the Council

Stefaan Vyverman
Member of the Council

Michel Van Bellinghen
Chairman of the Council

⁹ This parameter relates to fixed Very High Capacity Network (VHCN) coverage in % of households. (source: [DESI 2025](#))

¹⁰ FTTH/B coverage is the percentage of households having access to fibre up to the home or the building. (source: [DESI 2025](#))

¹¹ The results of Speedtest.net refer to September 2025. (source: [Speedtest](#))

Annex 1. Methodology

40. The international comparison discussed by the BIPT in this report follows the same method as the one used in previous editions of this study. This annex repeats the main characteristics of that method.
41. The comparison concerns the nominal prices of fixed, bundled and mobile residential telecom services in five countries: Belgium, France, Germany, Luxembourg and the Netherlands. The data used for this comparison were collected in October 2025. 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").
42. Just like the previous editions this 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.
43. 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 text 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.
44. 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).
45. 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 below.

| | Group/operator | Fixed broadband Internet and bundles | Mobile telephony |
|------------------------|---|--|---|
| Belgium | Proximus Telenet Orange | Proximus/Scarlet [40-50%] Telenet/Tadaam [30-40%] Orange [20-30%] | Proximus/Scarlet/M.Vikings [40-50%] BASE/Telenet [20-30%] 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 Eltrona | Post Lux [50-60%] Tango [10-20%] Orange [<10%] Lux. Online [<10%] Eltrona [<10%] | Post Lux [40-50%] Tango [30-40%] Orange [10-20%] Lux. Online [<10%] - |
| The Netherlands | KPN VodafoneZiggo Odido | KPN [30-40%] VodafoneZiggo [30-40%] Odido [10-20%] | KPN/Simyo/Youfone [20-30%] Vodafone/HollandseNieuwe [20-30%] Odido/Simpel [20-30%] |

Figure 3. List of operators meeting the criterion described above - The brackets indicate the operators' market shares (sources: national regulators, IDate 2025 and operators' financial publications)

46. 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 in June 2025).
47. 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 3% of connections at the end of 2024).

Non-convergent profiles (no mobile component)

| X Play | 2024 study | Changes in 2025 | Comments |
|---------------|--|------------------------|--|
| 1P Internet | 50 Mbps – 150 GB | Unchanged | Corresponds with a consumer profile with limited needs |
| | 100 Mbps – Unlimited volume | Unchanged | 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 | Unchanged | Corresponds with a consumer profile with large needs |
| 3P BB TV FT | 50 Mbps – Volume limited to 150 GB – 30 TV channels | Unchanged | Corresponds with 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 | 2024 study | Changes in 2025 | Comments |
|-----------|---|-----------------|--|
| 2P BB Mob | 100 Mbps – Unlimited BB volume – 10 GB Mobile volume | Unchanged | Nearly all 2P BB-MT services are sold with a minimum speed of 100 Mbps |
| | 200 Mbps – Unlimited BB volume – 10 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 BB volume – 50 television channels – 10 GB Mobile volume | Unchanged | - |
| | 200 Mbps – Unlimited BB volume – 50 television channels – 10 GB Mobile volume | Unchanged | - |