

BELGIAN INSTITUTE FOR POSTAL SERVICES AND TELECOMMUNICATIONS

PRESS RELEASE

The BIPT publishes its 2024 international comparative price study

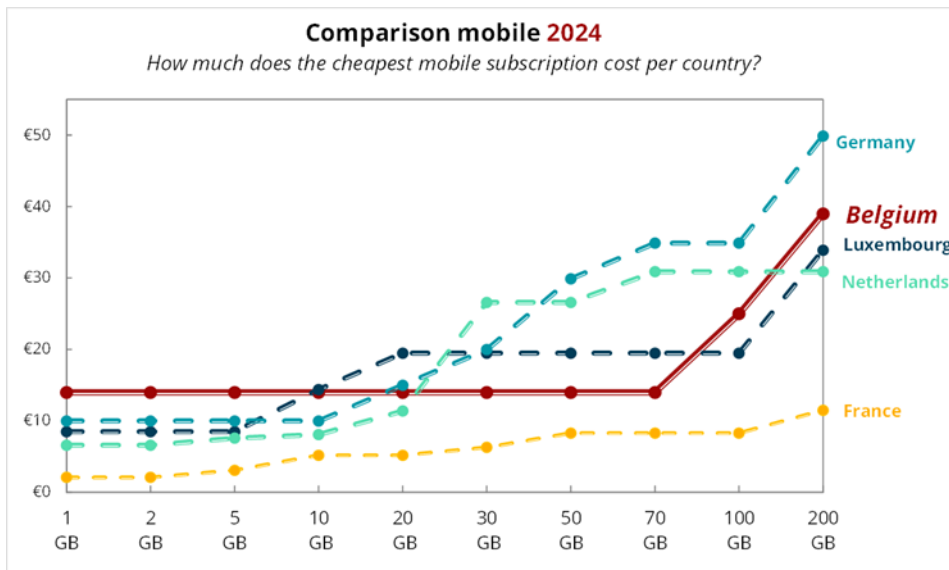
Brussels, 19 December 2024 - The BIPT publishes its annual study, in which the prices of telecom services in Belgium are compared with those in the neighbouring countries, based on the October 2024 prices. The study shows that, before the start of the 4th mobile operator, Belgium is expensive for small mobile subscriptions (up to 10 GB), fixed Internet and the heaviest popular bundles. However, our country already became more competitive in 2024 as regards mobile subscriptions with medium and big data needs. The competitive dynamics on the mobile market have improved in Belgium, whereas the dynamics on the fixed market are still limited. Following the start of the 4th mobile operator and the subsequent first responses those international comparisons change drastically. The BIPT will offer clarification in a second press release.

The BIPT has once again compared the prices of residential telecommunications services in our country with those in Germany, France, Luxembourg and the Netherlands. The study is based on the October 2024 prices, before the start of the 4th mobile operator, and maps for a number of consumer profiles the cheapest offer on the market. Only operators with a minimum 5% market share are included in the study.

Consumers who only require mobile telephony that includes 1,000 call minutes and a small data bundle up to 5 GB a month pay quite a bit more in Belgium than in the neighbouring countries. For medium mobile data needs, between 20 and 70 GB, Belgium is even cheap thanks to the *hey!*¹ offer, which was already renewed in 2024. If a minimum of 100 GB is required our country is situated in the middle bracket, whereas Belgium ranks second, after Germany, as the most expensive country for consumers who need a minimum of 200 GB.

Just like last year France remains remarkably cheaper than any other country for all mobile profiles in the study. Compared to Belgium the biggest gap is seen in case of needs of 200 GB minimum. Here, the most inexpensive subscription available on the Belgian market is €28 a month more expensive than in France.

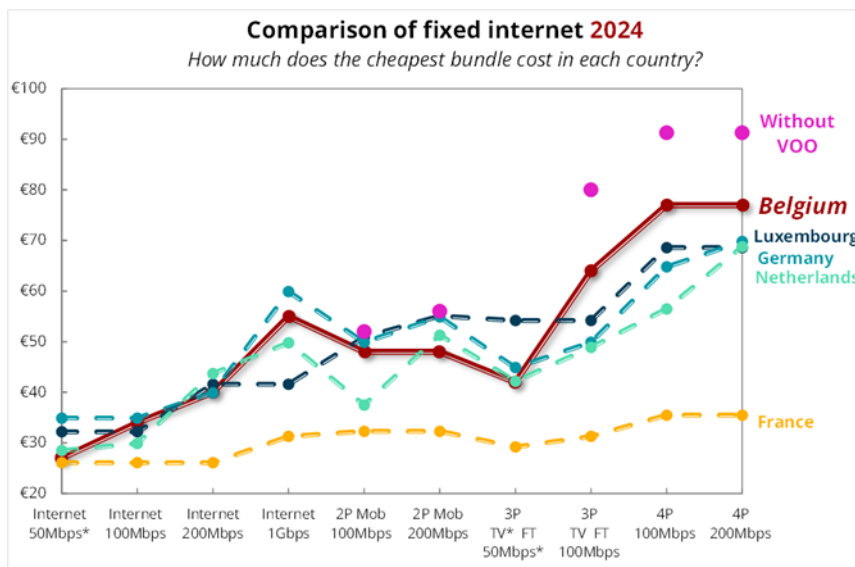
¹ This means the renewed hey! offer of 2024 before the start of the 4th operator and not the hey! offer at the end of 2024, which is improved even more after the start of the 4th operator.



As for fixed Internet and bundles, it can be concluded just like last year, that Belgium generally belongs to the more expensive half of the neighbouring countries, with the exception of the low requirement profiles. For the heaviest bundles, which are popular in our country, Belgium is by far the most expensive.

For fixed Internet and bundles too France is throughout the least expensive country by far, though the fixed network in that country is one of the better ones. In comparison with our country the biggest difference is seen in case of the 4P bundle with a minimum 200 Mbps download speed. Belgian consumers with that profile pay for the cheapest offer €42 a month more than in France, which is more than twice as much.

The rearrangement of the VOO offer, with lower prices for new subscribers, has had a positive impact on the Belgian results. As a consequence, for five profiles the prices are lower than last year. However, it is unclear whether Orange, which took over VOO in 2023, will continue to offer the VOO brand. When leaving out of account VOO's tariffs the Belgian prices on the bundle market would turn out to be remarkably expensive.



If not merely the least expensive offer but the price developments in the total product offer are considered, the BIPT sees an improvement in the competitive dynamics on the Belgian mobile market. Prices have remained stable and some operators even lowered their prices. In cases where prices were raised, the data volumes also went up. On the fixed market the dynamics have not improved; prices for fixed Internet and bundles have increased, without any clear improvements, even in the case of Orange, which takes more and more the position of an incumbent on the market.

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 products than in case of bundles. Moreover, the competition on the mobile market has already been influenced by the expected arrival of a fourth operator, DIGI. If DIGI launched convergent bundles (including fixed Internet), this could in time also lead to a revival of competition on the fixed market.

DIGI officially launched its activities in Belgium on 11 December 2024. In a separate press release the BIPT has presented a simulation of how DIGI's arrival changes Belgium's international position.

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