

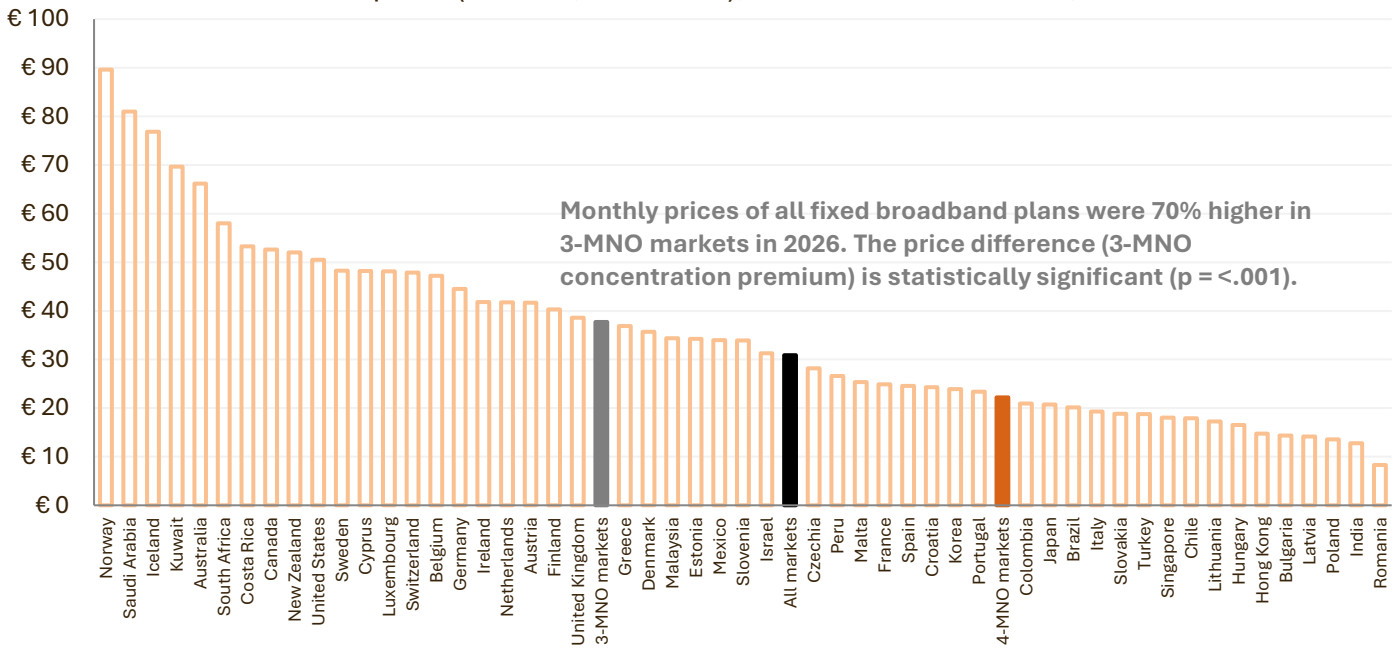
Fixed, 5G wireless and satellite broadband internet access prices in 2026 and historic (2023–2026) prices across 52 EU & OECD markets

Fixed broadband and 5G & 4G mobile broadband (incl. Fixed Wireless Access) internet access monthly prices—adjusted for download speed—continue to fall in 2026. The average fixed broadband monthly price fell to €31 (€33 in 2023) while the average mobile broadband price fell to €34 (€37 in 2023) across the 52 EU & OECD markets.

Prices of both fixed and mobile (wireless) broadband plans continue to fall steeper in 4-MNO markets. In particular, monthly prices of fixed broadband plans with Gigabit download speeds continue to fall steeper in 4-MNO markets, and the price difference—the **3-MNO concentration premium**—between 3-MNO and 4-MNO markets climb to 79% in 2026 (67% across the 2023–2026 period).

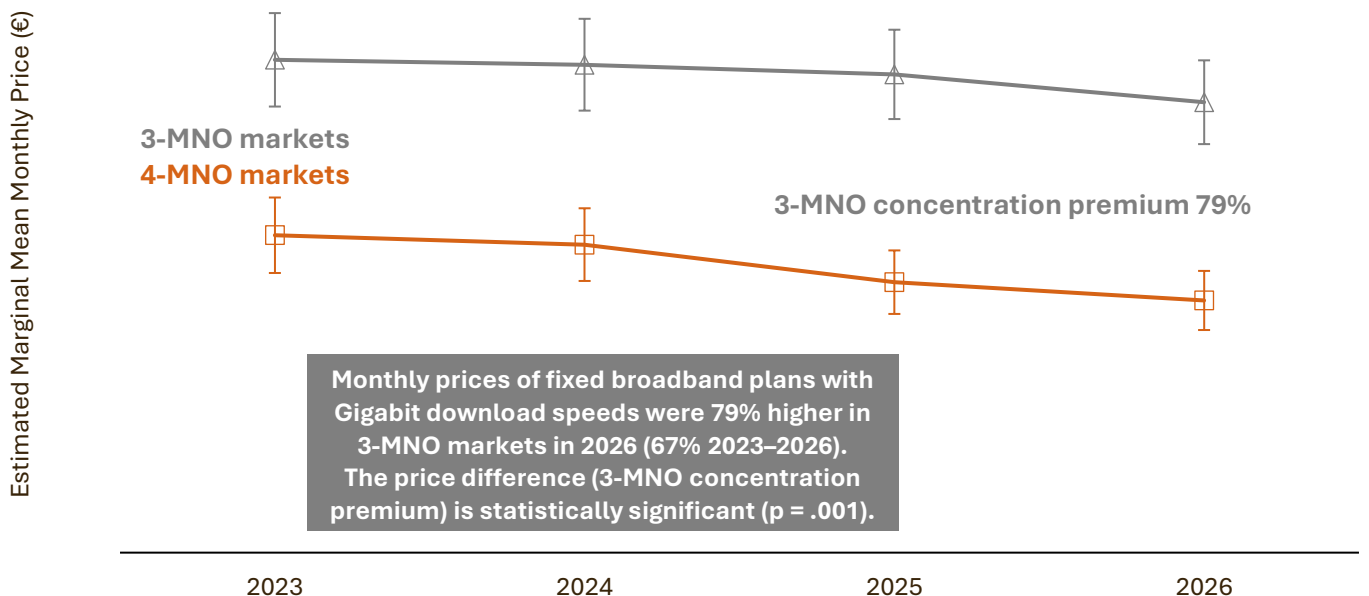
Rewheel research PRO study – June 2026.

Average monthly price (adjusted for download speed) of fixed broadband plans
All plans (10 to 50,000 Mbit/s), 52 EU & OECD markets, 2026



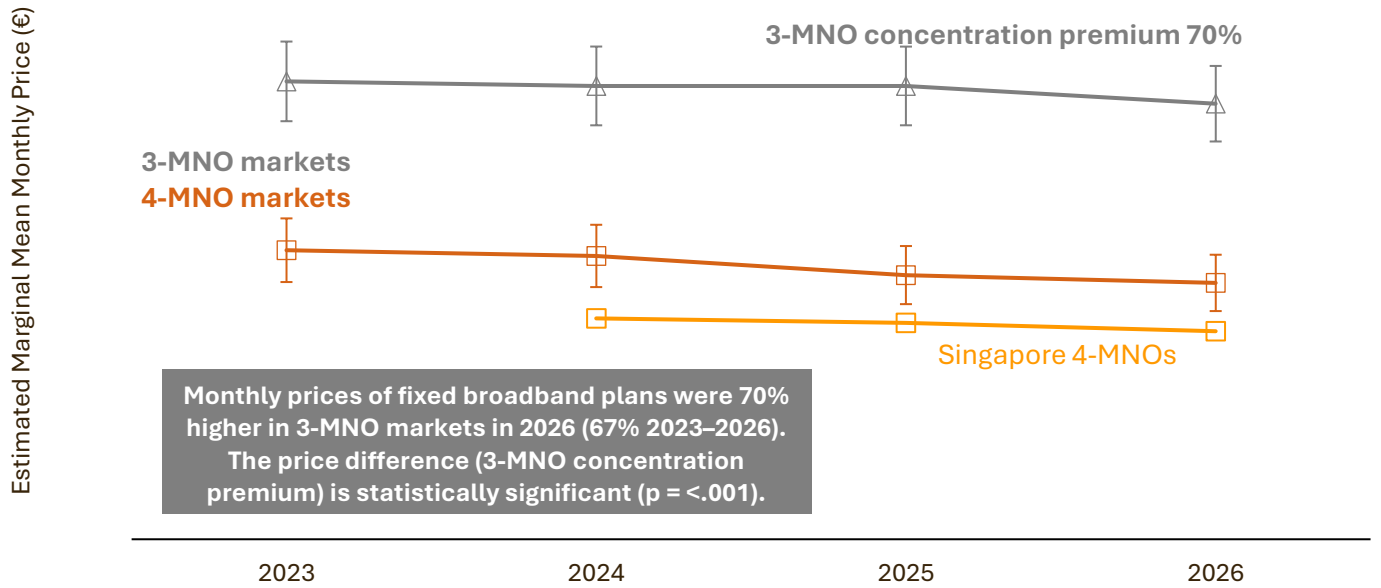
Monthly retail price (incl. VAT, taxes & fees) of all eligible fixed broadband (FTTx & FTTH) plans. 1,617 plans included in the model. The bars depict the Estimated Marginal Mean (EMM) monthly price adjusted for download speed calculated with a Longitudinal (2023-2026) Random Intercept Log-Log Mixed Model (LLMM) in Jamovi where the log (Ln) of the monthly price was the dependent variable, the Year and the market classification (3-MNO vs. 4-MNO) were fixed effects factors, the log (Ln) of the download speed was a centered covariate, and the Market ID was a clustered (random effects) variable. rewheel.fi/research

Average monthly price (adjusted for download speed) of fixed broadband plans
Gigabit plans (1 to 50 Gbit/s), 52 EU & OECD markets, 2023–2026



Monthly retail price (incl. VAT, taxes & fees) of all eligible fixed broadband (FTTx&FTTH) plans. 1,804 plans included in the model. The lines depict the Estimated Marginal Mean (EMM) monthly price adjusted for download speed calculated with a Longitudinal (2023-2026) Random Intercept Log-Log Mixed Model (LLMM) in Jamovi where the Ln of the monthly price was the dependent variable, the Year and the market classification (3-MNO vs. 4-MNO) were fixed effects factors, the Ln of the download speed was a centered covariate, and the Market ID was a clustered (random effects) variable. rewheel.fi/research

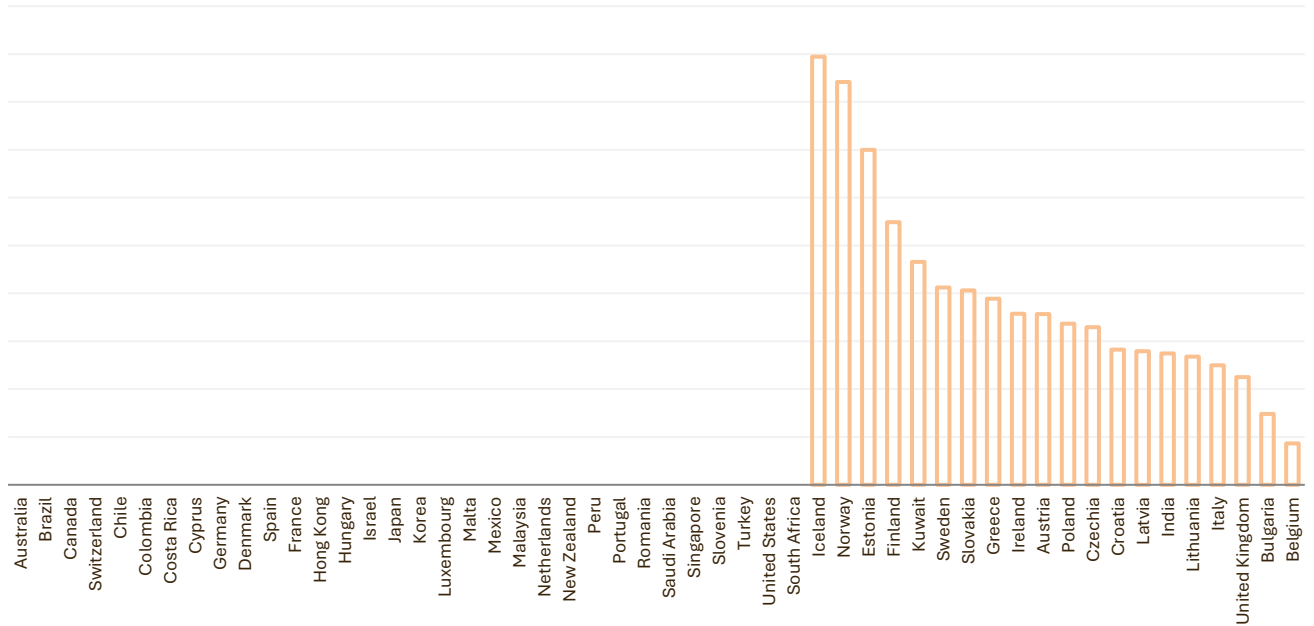
Average monthly price (adjusted for download speed) of fixed broadband plans
All plans (10 to 50,000 Mbit/s), 52 EU & OECD markets, 2023–2026



Monthly retail price (incl. VAT, taxes & fees) of all eligible fixed broadband (FTTx & FTTH) plans. 5,322 plans included in the model.
The lines depict the Estimated Marginal Mean (EMM) monthly price adjusted for download speed calculated with a Longitudinal (2023-2026) Random Intercept Log-Log Mixed Model (LLMM) in Jamovi where the Ln of the monthly price was the dependent variable, the Year and the market classification (3-MNO vs. 4-MNO) were fixed effects factors, the Ln of the download speed was a centered covariate, and the Market ID was a clustered (random effects) variable.

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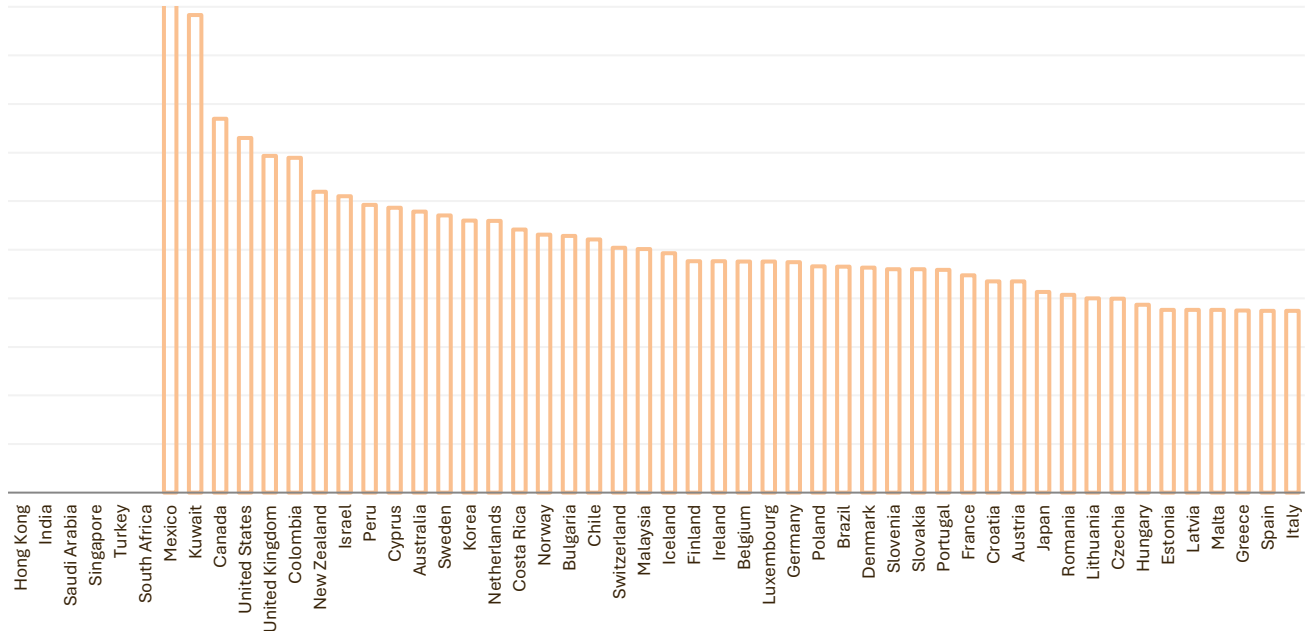
Median monthly price of 5G & 4G fixed wireless (FWA) broadband internet access plans (10 to 1000 Mbit/s), 52 EU & OECD markets, 2026



The monthly retail price (incl. VAT, taxes & fees) includes the monthly or one-off cost for both the indoor WiFi router and the cost of the outdoor unit (external antenna), including installation costs where mandatory. One-off fees were divided by 24 and added to the monthly price. In Belgium, DIGI sold a 5G plan with unlimited data volume for €7 plus a €40 one-time fee for the 5G modem/router. The bars depict the unadjusted (not speed adjusted) monthly prices.

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Median monthly price of Starlink satellite broadband internet access plans (100 to 300 Mbit/s speed tiers), 52 EU & OECD markets, 2026



The monthly retail price (incl. VAT, taxes & fees) includes the recurring monthly fee for the selected service (in most markets the service tiers are 100 Mbps, 200 Mbps, and Max speed, which is typically ~300 Mbps), the mini (100 Mbps) or standard (200 and Max Mbps) antenna kits including a WiFi router and shipping cost. The median monthly prices shown in the chart above typically depict the price of the 200 Mbps service with the standard antenna kit. In Mexico, the monthly price includes an equipment surcharge for high demand. One-off fees were divided by 24 and added to the monthly service fee. Subscribe for full pricing details.

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1 Context and methodology

Rewheel has been tracking mobile prices since 2012. Rewheel first international comparison study¹ of mobile prices was conducted in December 2012. It tracked mobile voice-data prices across the 27 countries that were members of the European Union at the time. The main finding of Rewheel's 2012 study, *"Research shows that users pay up to ten times more to use their smartphones in those Member States where there is no challenger to the big European operators"* was cited² by the former Vice President of the European Commission, Joaquin Almunia, in a speech dated the 28th of February 2013.

Rewheel's studies are the world's most comprehensive mobile (wireless) voice-data and broadband internet access price comparison studies. Rewheel's research aims to objectively and accurately measure the price differences across mobile and broadband markets and identify and quantify the competition factors (e.g., 4 versus 3 mobile network operators) that underpin the massive price differences.

In March 2026, Rewheel published³ the twenty-first release of its mobile price comparison series titled *"5G & 4G prices in 52 EU & OECD markets in 2026 and post-merger price increases in the 4-to-3 consolidated UK mobile market"* with 5G & 4G mobile voice-data plan prices from 52 European, American, Asia Pacific, Middle Eastern, and African countries.

Herein, Rewheel tracked, analyzed, and reported the state of broadband internet access pricing in 2026 across the 52 EU & OECD markets where it has been tracking mobile prices. In its mobile price comparison study series, Rewheel moved from biannual tracking to annual tracking in 2022. Between 2014 and 2021, Rewheel tracked mobile prices twice per year. Thereafter, once a year. This is the fourth year (2023, 2024, 2025, and 2026) Rewheel tracked, analyzed, and reported broadband internet access prices.

¹<https://rewheel.fi/research>

²https://ec.europa.eu/commission/presscorner/detail/en/speech_13_168

³<https://rewheel.fi/research>

1.1 52 European, American, Asia Pacific, Middle Eastern and African markets included in the comparison

In 2026, Rewheel tracked and analyzed broadband plan prices across 52 European, American, Asia Pacific, Middle Eastern, and African countries hereinafter referred to as 52 EU & OECD markets. The 52 markets included in the comparison are listed in the table below. The 52 markets are listed alphabetically following the two-letter country code abbreviation. The table contains information regarding the European Union (EU 27 countries) country membership and/or the Organization for Economic Development and Cooperation country membership (OECD 36 countries).

EU	OECD	Code	Country Name
Yes	Yes	AT	Austria
No	Yes	AU	Australia
Yes	Yes	BE	Belgium
Yes	No	BG	Bulgaria
No	No	BR	Brazil
No	Yes	CA	Canada
No	Yes	CH	Switzerland
No	Yes	CL	Chile
No	Yes	CO	Colombia
No	Yes	CR	Costa Rica
Yes	No	CY	Cyprus
Yes	Yes	CZ	Czechia
Yes	Yes	DE	Germany
Yes	Yes	DK	Denmark
Yes	Yes	EE	Estonia
Yes	Yes	EL	Greece
Yes	Yes	ES	Spain
Yes	Yes	FI	Finland
Yes	Yes	FR	France
No	No	HK	Hong Kong
Yes	No	HR	Croatia
Yes	Yes	HU	Hungary
Yes	Yes	IE	Ireland
No	Yes	IL	Israel
No	No	IN	India
No	Yes	IS	Iceland
Yes	Yes	IT	Italy
No	Yes	JP	Japan
No	Yes	KR	Korea
No	No	KW	Kuwait
Yes	No	LT	Lithuania
Yes	Yes	LU	Luxembourg
Yes	Yes	LV	Latvia
Yes	No	MT	Malta
No	Yes	MX	Mexico
No	No	MY	Malaysia
Yes	Yes	NL	Netherlands
No	Yes	NO	Norway
No	Yes	NZ	New Zealand
No	No	PE	Peru
Yes	Yes	PL	Poland
Yes	Yes	PT	Portugal
Yes	No	RO	Romania
No	No	SA	Saudi Arabia
Yes	Yes	SE	Sweden
No	No	SG	Singapore
Yes	Yes	SI	Slovenia
Yes	Yes	SK	Slovakia
No	Yes	TR	Turkey
No	Yes	UK	United Kingdom
No	Yes	US	United States
No	No	ZA	South Africa

1.2 Methodology

Similar to Rewheel’s mobile price comparison methodology that was designed from the onset to measure the price of naked mobile data connectivity, Rewheel’s broadband price comparison methodology aims to measure the price of naked broadband internet access connectivity.

Surely, many operators prefer to sell plans—locking in consumers to contracts with a total higher monthly fee—that on top of broadband internet access connectivity include fixed-line telephony and/or TV services and/or OTT video streaming services and/or mobile services, and/or electricity services, etc., but more often than not all these additional services are either redundant (e.g., fixed-line telephony is redundant to most consumers having a mobile telephone), duplicate (e.g., telco-owned video streaming services since most consumers subscribe to OTT video streaming services such as Netflix), or add little incremental value to a naked broadband internet access connection.

Rewheel’s methodology aims to measure the monthly price of internet access connections that are delivered by mainstream providers of fiber (FTTH, FTTx such as FTTP, FTTN, FTTB, etc.) broadband country-wide connectivity, mobile (5G & 4G) broadband country-wide connectivity, and starting from 20206 satellite broadband country-wide connectivity (e.g., Starlink).

1.2.1 Broadband internet access plans tracked and analyzed in 2026

Rewheel tracked broadband internet access plans with unlimited data volume and an advertised peak download speed of at least 10 Mbit/s. Plans with unlimited data volume are plans having at least 1,000 gigabytes of data volume delivered at high speeds that are not throttled below 10 Mbit/s. Eligible broadband plans were plans delivered over full fiber (FTTH) networks, hybrid-fiber networks (FTTP, FTTB, and FTTN referred to here as FTTx, such as a combination of cable, DSL, and fiber), 5G or 4G mobile networks, and satellite broadband networks. Broadband plans delivered by fixed wireless access technologies other than 5G or 4G were not eligible.

This fourth release, 2026, contains 2,077 broadband plans. 1,617 of those were fixed broadband (FBB) plans, 240 were mobile broadband (MBB) plans, 74 were 5G or 4G fixed wireless access (FWA) plans, and 146 were satellite access (SAT) plans

According to Rewheel’s methodology, 5G or 4G fixed wireless access (FWA) plans were plans that included an outdoor unit (i.e., external antenna). Plans delivered over 5G or 4G networks without an external antenna were designated as mobile broadband plans (MBB) in the database irrespective of the provider’s classification (e.g., mobility restrictions) or advertised peak speeds.

1.2.2 Number of broadband (fixed, mobile or satellite) network operators and service providers included in the database

In 2026 2,077 broadband internet access plan prices from 329 network operators and a total of 413 service providers were logged in the database. In 2025 1,664 broadband internet access plan prices from 255 network operators and a total of 337 service providers were logged in the database. In 2024 1,487 broadband internet access plan prices from 255 network operators and a total of 316 service providers were logged in the database. In 2023 1,308 broadband internet access plan prices from 239 network operators and a total of 282 service providers were logged in the database.

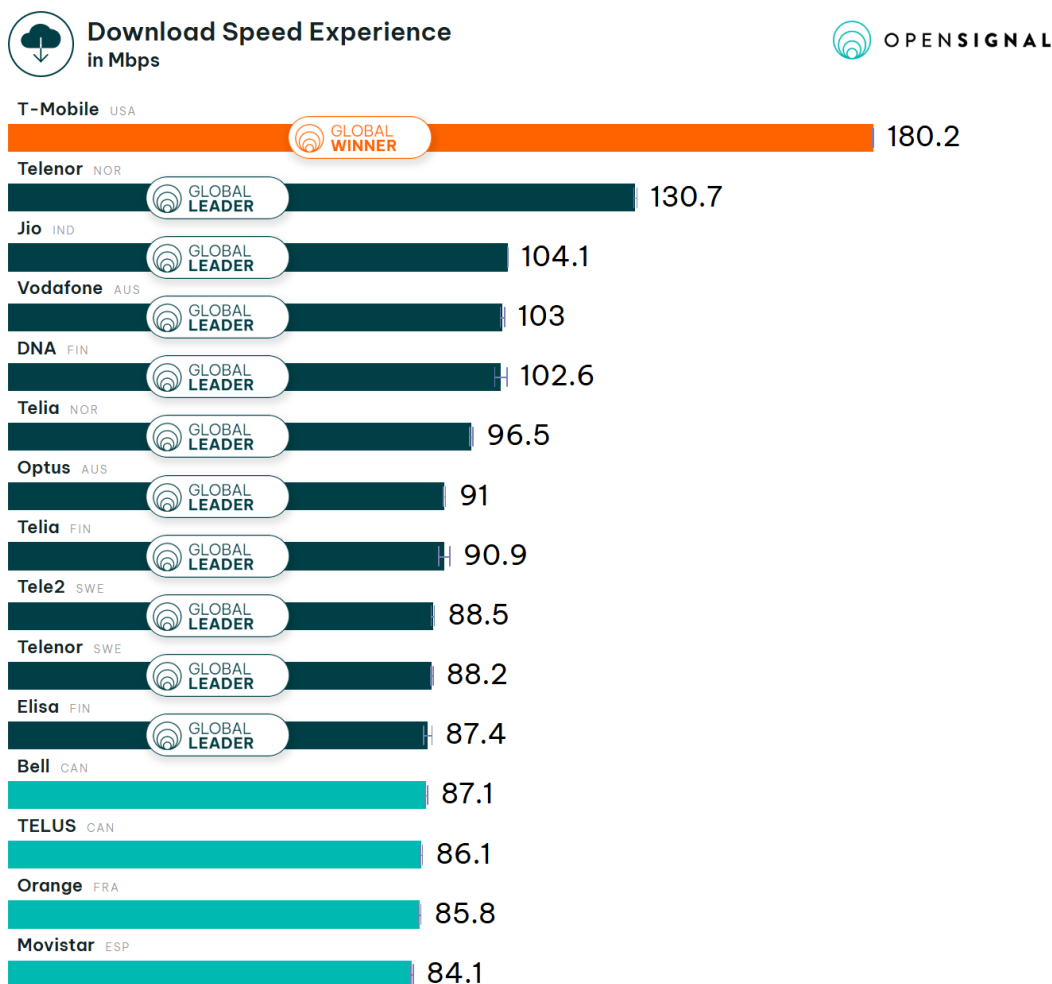
1.2.3 Broadband plans with Gigabit (at least 1 Gbit/s) download speeds

Full fiber or hybrid-fiber fixed broadband plans that were advertised with download speeds of 1 Gbit/s were designated as plans with Gigabit download speeds. In some markets, providers, besides stating the advertised speed, also informed consumers about the typical peak hour speed - which was lower than the advertised speed - or the guaranteed minimum speed that consumers should expect. Irrespective of that, all fiber or hybrid-fiber plans advertised as having a download speed of at least 1 Gbit/s were designated as Gigabit broadband plans in the database.

Only 5G fixed wireless access (FWA) plans with an outdoor unit were assigned in the database with the maximum designated speed for non-fiber plans of 1 Gbit/s, and only if the provider explicitly sold plans with a speed of 1 Gbit/s. In cases where the provider did not sell speed tiers or the provider stated “speeds are up to 1 Gbit/s,” a typical download speed of 50 Mbit/s for 4G and 100 Mbit/s for 5G broadband plans was logged. As seen in the chart below, according to Opensignal⁴, under typical usage conditions, the average download speed experience of 5G users does not exceed 200 Mbit/s.

Global Winners and Leaders

Large Land Area | Top 20 Operators



⁴<https://insights.opensignal.com/2026/02/11/global-awards-2026/dt>

1.2.4 Collection methods and broadband plan detailed eligibility rules

Plan details were collected from the service providers' websites during April and May 2026. Screenshots from every single service provider plan that was used in the comparative analysis were archived.

Eligible plans were monthly rolling plans with or without an initial fixed contract period (e.g., 24 months) that were available to all consumers. Plans with lower prices, higher speeds, higher gigabyte allowances, or additional services or equipment included that were offered to selected consumers such as youth, seniors, soldiers, additional family members, second homes, affiliated credit cards, PayPal accounts, etc., were ineligible.

The retail prices of all naked broadband internet access plans for all eligible technologies, speeds, and data volumes were logged in the database. For a few providers that did not sell naked broadband internet access plans or limited the naked plans to lower speeds, the cheapest available bundled plan for each available higher download speed was also logged in the database. For example, a provider sold naked broadband plans with 100, 300, and 500 Mbit/s download speeds and a plan with a 1 Gbit/s download speed bundled with a Netflix subscription. All four plans for this provider were logged in the database by inserting a note that the plan with the 1 Gbit/s speed includes a video streaming subscription in the monthly price.

The following parameters were collected for each plan: the date and time of collection, the country, the group operator name, the network operator name, the service provider name, the brand type (main or sub-brand or VNO), the monthly price in local currency, the monthly price in Euro, the included data volume allowance (finite volume of 1,000 gigabytes or more or unlimited data volume), the download peak speed specified by the provider (10 Mbit/s to 50 Gbit/s), the technology (FBB, MBB, FWA, SAT), the access type (FTTH, FTTx, 5G, 4G, SAT), the plan name, any applicable plan options included, other important notes, the address if the provider had no general prices available and finally the URL of the provider.

1.2.5 Broadband plan prices – What fees are included and how the monthly fee was calculated?

The monthly price logged in the database for each plan includes the reoccurring monthly fee for the service, one-off activation/connection/installation/shipping fees wherever applicable, and equipment (modem/router WiFi) fees. All one-off fees, lump-sum fees, and partial lump-sum fees are amortized during 24 months. For example, if the provider specified a monthly fee of €20 with a 24-month contract plus an activation/shipping fee of €240 and an upfront router fee of €240, then the monthly price was calculated as $€20 + €240/24 + €240/24 = €40$.

The 24-month contract period, followed by the 12-month and the 36-month contract periods, were the most common fixed contract periods that consumers were required to sign up for when subscribing to a new broadband internet access connection.

The monthly fee of each broadband plan is the retail price of the plan, including VAT and all other applicable taxes, such as service or sales tax, and all other regulatory or commercial fees where specified for the establishment of a new broadband internet access connection, including the cost for a new basic modem-WiFi-router.

Only mandatory installation fees are included in the monthly price. Optional installation fees are not included. When providers offered a cheaper "install it yourself" option, that cheaper option was selected over the more expensive "professional installation" option.

Construction or apartment re-wiring fees were not included in the monthly fee of fixed (FTTH, FTTx) broadband connections. Hence, the price for fixed broadband connections shown herein is the price applicable to addresses that are already connected to fixed broadband networks.

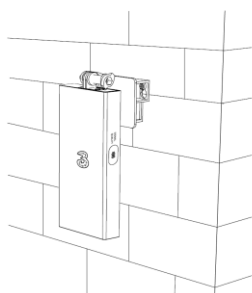
The additional cost for the latest WiFi router (WiFi 7 or 8) or the cost for a mesh WiFi network that provides full coverage in large apartments and detached houses is not included in the monthly price unless the provider has bundled the cost for such equipment on its plans and consumers have no option to buy the plan without the advanced WiFi router or mesh WiFi. If a provider did not include as standard a modem-WiFi-router on its plans, then the cheapest basic modem-WiFi-router sold separately by the provider was added to the monthly price.

For 5G FWA plans with an outdoor unit, the installation cost for the external antenna was included in the monthly price if it was not already included and if the provider did not offer to the customer the option to install the antenna themselves free of charge. For example, as seen in the screenshots below, Three UK does not charge extra for the installation of the outdoor unit and expects its clients to carry out the installation⁵ themselves by following its installation guide.

Installation options

There are 4 ways to install your hub, choose your preferred method.

1.



Wall Mount – For outdoor set-up

Simple 5G Outdoor Hub set-up

Watch our video to see how to install our hub. And if you need any help getting it up and running, our dedicated support team are on-hand.



⁵<https://www.three.co.uk/broadband/home-broadband/5g-outdoor-hub>

1.2.6 Prices in local currencies are converted in Euro using market exchange rates – No PPPs

No Purchase Power Parity (PPP) operation has been performed on the raw tariff plan prices. Prices in EUR are the retail prices (VAT and other applicable taxes and fees included where available) found on the service provider websites. Prices in other national currencies have been converted to EUR by using market exchange rates (displayed by Google on the day of collection).

Please note that in each release, historic prices in non-euro countries are converted to euros using the latest exchange rate (i.e., the exchange rate logged in the latest release). Hence, historic prices may vary from release to release. For example, the USD to EUR exchange rate has fluctuated from 0.74 to 0.96 during the last 13 years. In 2026, historic US prices (i.e., 2014 to 2025 prices) were converted to EUR using a flat 0.85 exchange rate. A methodological exception was applied to the Turkish market due to extreme macroeconomic volatility of the Turkish Lira. Between 2016 and 2026, the Turkish Lira experienced a massive devaluation of approximately 94% against the Euro.

Please note that the Bulgarian lev (BGN) was pegged to the euro before Bulgaria formally adopted the euro in 2026, while the Danish krone (DKK) is semi-pegged to the euro with a fluctuation band of +/- 2.25%. The methodology has historically considered the Danish krone having a fixed exchange rate with the euro of 0.13. The Romanian leu (RON) is scheduled to be replaced by the euro in 2026. In light of that, Romanian operators and service providers have been offering their services by displaying the retail prices in euros.

EU	OECD	Code	Country Name	1H26
Yes	Yes	AT	Austria	1.0000
No	Yes	AU	Australia	0.6000
Yes	Yes	BE	Belgium	1.0000
Yes	No	BG	Bulgaria	1.0000
No	No	BR	Brazil	0.1600
No	Yes	CA	Canada	0.6200
No	Yes	CH	Switzerland	1.1000
No	Yes	CL	Chile	0.0010
No	Yes	CO	Colombia	0.0002
No	Yes	CR	Costa Rica	0.0017
Yes	No	CY	Cyprus	1.0000
Yes	Yes	CZ	Czechia	0.0410
Yes	Yes	DE	Germany	1.0000
Yes	Yes	DK	Denmark	0.1300
Yes	Yes	EE	Estonia	1.0000
Yes	Yes	EL	Greece	1.0000
Yes	Yes	ES	Spain	1.0000
Yes	Yes	FI	Finland	1.0000
Yes	Yes	FR	France	1.0000
No	No	HK	Hong Kong	0.1100
Yes	No	HR	Croatia	1.0000
Yes	Yes	HU	Hungary	0.0026
Yes	Yes	IE	Ireland	1.0000
No	Yes	IL	Israel	0.2700
No	No	IN	India	0.0093
No	Yes	IS	Iceland	0.0069
Yes	Yes	IT	Italy	1.0000
No	Yes	JP	Japan	0.0055
No	Yes	KR	Korea	0.0006
No	No	KW	Kuwait	2.7500
Yes	No	LT	Lithuania	1.0000
Yes	Yes	LU	Luxembourg	1.0000
Yes	Yes	LV	Latvia	1.0000
Yes	No	MT	Malta	1.0000
No	Yes	MX	Mexico	0.0490
No	No	MY	Malaysia	0.2200
Yes	Yes	NL	Netherlands	1.0000
No	Yes	NO	Norway	0.0890
No	Yes	NZ	New Zealand	0.5100
No	No	PE	Peru	0.2500
Yes	Yes	PL	Poland	0.2400
Yes	Yes	PT	Portugal	1.0000
Yes	No	RO	Romania	1.0000
No	No	SA	Saudi Arabia	0.2200
Yes	Yes	SE	Sweden	0.0950
No	No	SG	Singapore	0.6700
Yes	Yes	SI	Slovenia	1.0000
Yes	Yes	SK	Slovakia	1.0000
No	Yes	TR	Turkey	0.0190
No	Yes	UK	United Kingdom	1.1400
No	Yes	US	United States	0.8500
No	No	ZA	South Africa	0.0530

About Rewheel

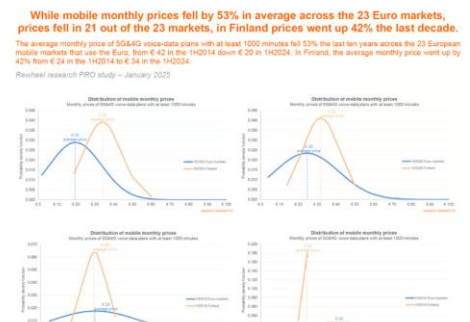
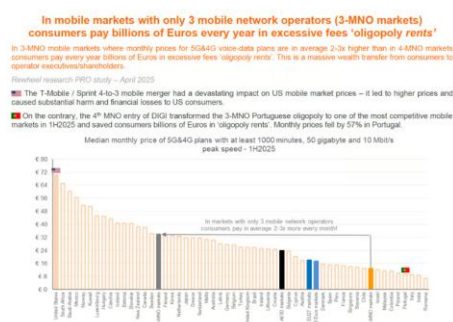
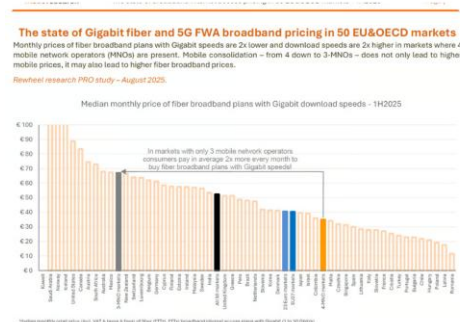
Founded in 2009 and incorporated in Finland, Rewheel is a privately owned independent telecom research & advisory firm. Rewheel's clients are mobile network operators, telco groups, MVNO groups, competition authorities, telecom sector regulators, governments, global internet firms, mobile data-centric start-ups, PE and VC investors.

Rewheel has advised clients in the United States, United Kingdom, Germany, Ireland, Switzerland, Finland, Sweden, Belgium, Greece, Poland, Slovenia, Hungary, Russia and Romania in mobile data pricing strategies, mobile network economics, consolidation impact, mobile mergers, effective remedies, market modelling, new market entries, network sharing, spectrum valuations, network operator marginal data cost, MVNO economics and 4th mobile network operator (MNO) business cases.

Antonios Drossos, Rewheel's co-founder and managing partner, is a competition and network economics expert with over 25 years of mobile (wireless) industry and 15 years of independent research and advisory experience.

Rewheel's research findings and Antonios Drossos expert opinions have been cited/quoted by the OECD Economic Surveys, The Economist, The Financial Times, The New York Times, Reuters, Bloomberg, The Wall Street Journal and publicly referenced by the UK telecoms regulator Ofcom, BIPT, Vodafone, Telefonica, Tele2, 1&1, Elisa, DNA, GSMA, VPs of the EU Commission responsible for Competition, MEPs, IEEE, ITU and many others.

Recent Rewheel research PRO-reports



The state of Gigabit fiber & 5G FWA broadband pricing in 50 EU&OECD markets - 1H2025

Monthly prices of fiber broadband plans with Gigabit speeds are 2x lower and download speeds are 2x higher in markets where 4 mobile network operators (MNOs) are present. Mobile consolidation – from 4 down to 3-MNOs – does not only lead to higher mobile prices, it may also lead to higher fiber broadband prices.

The state of 5G&4G pricing in 50 EU&OECD mobile markets - 1H2025

In markets with only 3 mobile network operators (3-MNO markets) where monthly prices for 5G&4G voice-data plans are in average 2-3x higher than in 4-MNO markets consumers pay every year billions of Euros in excessive fees 'oligopoly rents'. This is a massive wealth transfer from consumers to operator executives/shareholders.

Mobile monthly prices in Euro markets fell by 53% the last decade, in Finland prices went up by 42% - 2025

While mobile monthly prices fell by 53% in average across the 23 Euro markets, prices fell in 21 out of the 23 markets, in Finland prices went up 42% the last decade. The average monthly price of 5G&4G voice-data plans with at least 1000 minutes fell 53% the last ten years across the 23 European mobile markets that use the Euro, from € 42 in the 1H2014 down € 20 in 1H2024. In Finland, the average monthly price went up by 42% from € 24 in the 1H2014 to € 34 in the 1H2024.

The following authorities have acquired access to Rewheel's research: The European Commission Directorate for Competition, the United States Department of Justice, the New York, California and many other US State Attorney General Offices, the national competition authorities of Canada, Australia, the Netherlands and Greece, the Ministry of Economic Affairs of the Netherlands, the Ministry of Industry and Trade of Czechia, the Korean Electronics and Telecommunication Research Institute, the sector regulators of the United Kingdom, Germany, France, the Netherlands, Finland, Portugal, Ireland and Members of the Canadian House of Commons.

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