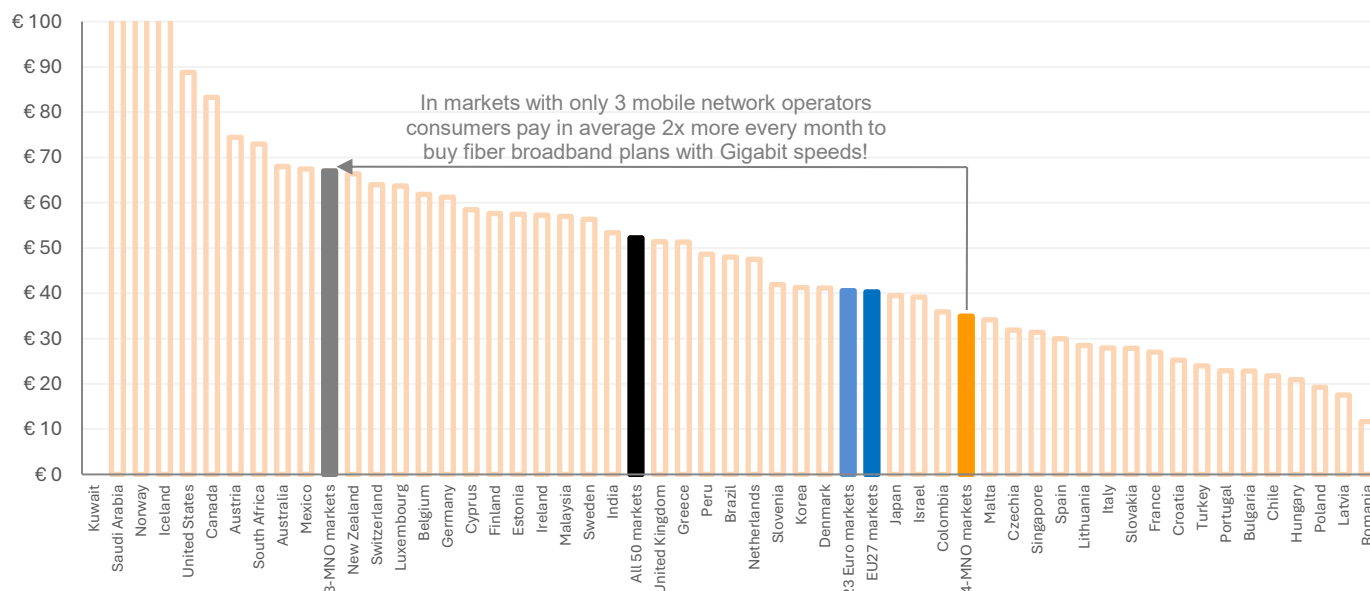


## The state of Gigabit fiber and 5G FWA broadband pricing in 50 EU&OECD markets

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.

Rewheel research PRO study – August 2025.

Median monthly price of fiber broadband plans with Gigabit download speeds - 1H2025



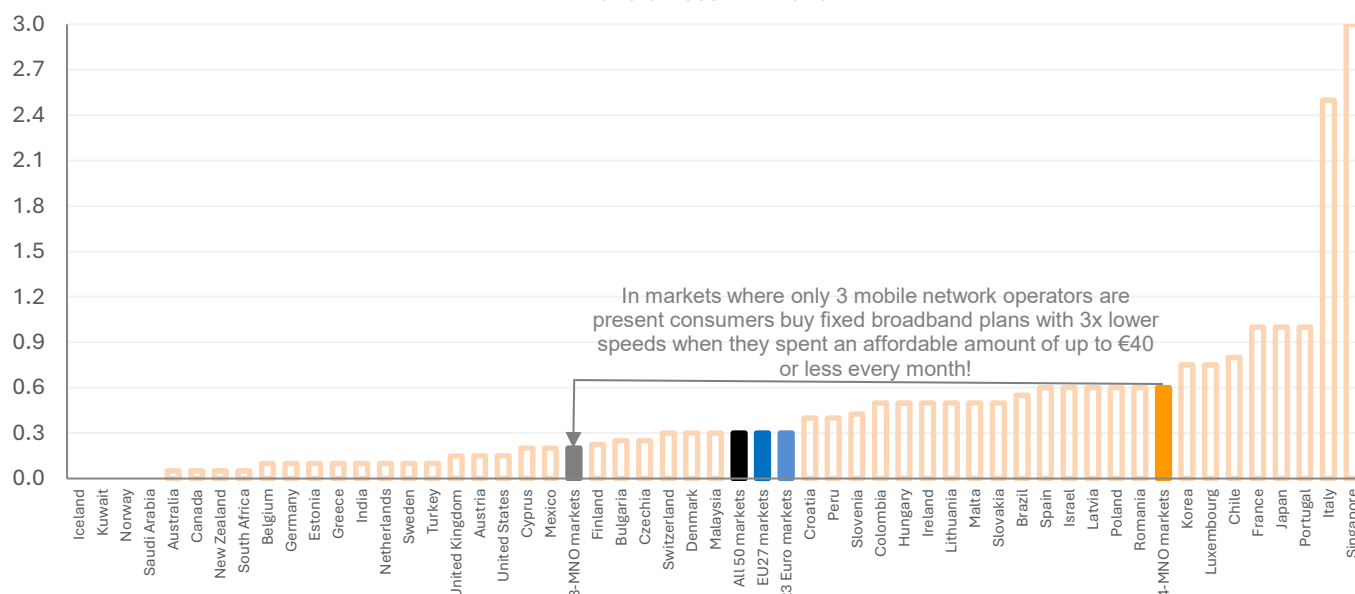
Median monthly retail price (incl. VAT & taxes & fees) of fiber (FTTH, FTTx) broadband internet access plans with Gigabit (1 to 50 Gbit/s) download speeds sold in a market or across all markets that are included in a group (e.g., EU 27 markets).

[rewheel.fi/research](https://rewheel.fi/research)

### Highlights

- Monthly prices of fiber (FTTH, FTTx) broadband plans with Gigabit download speeds are 2x higher and download speeds are 2x lower in 3-MNO vs. 4-MNO markets.
- Monthly prices of fixed broadband plans are 1.6x higher and download speeds are 2x lower in 3-MNO vs. 4-MNO markets.
- Monthly prices of fixed, fixed wireless (FWA) and mobile broadband plans are 1.5x higher and download speeds are 2x lower in 3-MNO vs. 4-MNO markets.
- In markets where only 3 mobile network operators are present consumers buy fixed broadband plans with 3x lower speeds when they spent an affordable amount of up to €30 or up to €40 every month!

Median download speed in Gbit/s of affordable fixed broadband internet access plans that cost €40 or less - 1H2025



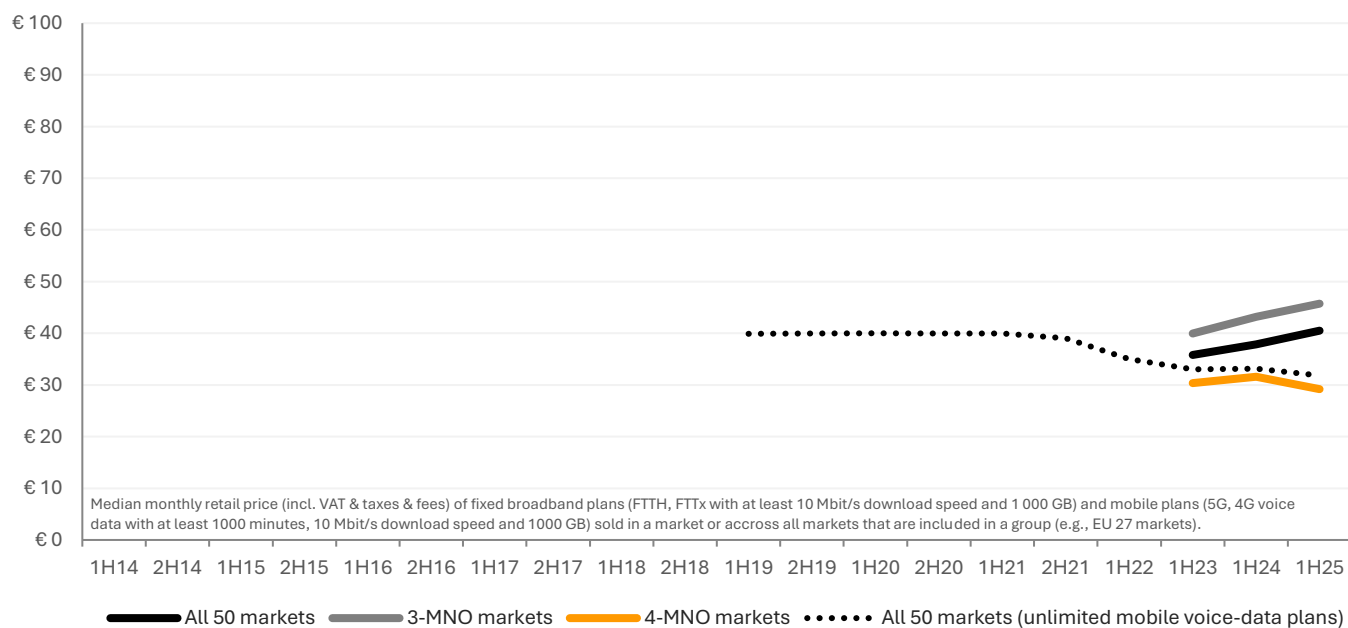
Median download speed in Gbit/s of affordable fixed broadband internet access plans that cost €40 or less sold in a market or across all markets that are included in a group (e.g., EU 27 markets).

[rewheel.fi/research](https://rewheel.fi/research)

### Highlights of historic price development of fixed, fixed wireless, mobile broadband plans and fiber plans with Gigabit speeds

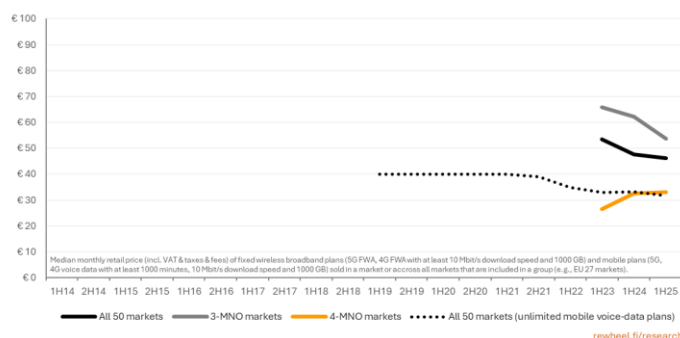
- The median monthly price of fixed broadband plans increased across all 50 markets (from €38 in the 1H2024 to €41 in the 1H2025), it increased accross 3-MNO markets (from €43 to €46) but fell in 4-MNO markets (from €32 to €29).
- Unlimited mobile voice-data plans are as cheap as fixed broadband plans (€32 vs. €29) in 4-MNO markets.
- The median monthly price of fixed wireless broadband plans (FWA) decreased across all 50 markets (from €48 in the 1H2024 to €46 in the 1H2025), it decreased accross 3-MNO markets (from €62 to €54) and increased slightly in 4-MNO markets (from €32.5 to €33).
- The median monthly price of mobile broadband plans remained flat across all 50 markets (€36), it remained flat accross 3-MNO markets (€38) and decreased slightly in 4-MNO markets (from €33.5 to €33).
- The median monthly price of fiber broadband plans with Gigabit speeds increased across all 50 markets (from €49 in the 1H2024 to €52 in the 1H2025), it increased accross 3-MNO markets (from €64 to €69) but fell in 4-MNO markets (from €40 to €35) compared to the 1H2024.

Median monthly price of fixed broadband plans and of unlimited mobile voice-data plans



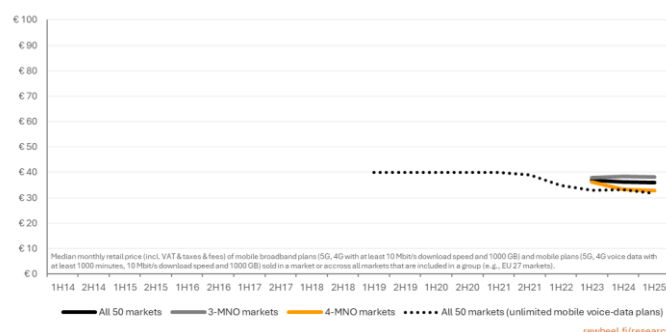
[rewheel.fi/research](https://rewheel.fi/research)

Median monthly price of fixed wireless broadband plans and of unlimited mobile voice-data plans



[rewheel.fi/research](https://rewheel.fi/research)

Median monthly price of mobile broadband plans and of unlimited mobile voice-data plans



[rewheel.fi/research](https://rewheel.fi/research)

Median monthly price of fiber broadband plans with Gigabit download speeds



[rewheel.fi/research](https://rewheel.fi/research)

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## 1 Context and methodology

Rewheel has been tracking mobile prices since 2012. Rewheel first international comparison study<sup>1</sup> 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 cited<sup>2</sup> by the former Vice President of the European Commission, Joaquin Almunia in a speech dated the 28<sup>th</sup> of February 2013.

Rewheel's studies are the world's most comprehensive mobile and broadband price comparison studies. Rewheel's price comparison research aim is to independently and objectively measure the price differences across mobile and broadband markets, identify and examine the competition factors (e.g., 4 versus 3 mobile network operators) that drive the price differences.

In March 2023 we published<sup>3</sup> the 18<sup>th</sup> release of our mobile price comparison series titled *"The state of 4G and 5G pricing, 1H2023 – Inflation edition"* with mobile voice-data, mobile broadband and wireless broadband plan prices from 50 European, American, Asia Pacific, Middle East and African countries.

In June 2023, for the first time, we published<sup>4</sup> a broadband price comparison study titled *"The state of broadband (FBB&FWA) pricing – 1H2023"* with fixed broadband and fixed-wireless access (FWA) broadband plan prices from 50 European, American, Asia Pacific, Middle East and African countries.

In April 2024, we published<sup>5</sup> the 19<sup>th</sup> release of our mobile price comparison series titled *"The state of mobile and broadband pricing – 1H2024"* with mobile voice-data, mobile broadband fixed broadband plan prices from 50 European, American, Asia Pacific, Middle East and African countries.

In April 2025, we published<sup>6</sup> the 20<sup>th</sup> release of our mobile price comparison series titled *"The state of 5G&4G pricing in 50 EU&OECD mobile markets - 1H2025"* with 5G&4G mobile voice-data plan prices from 50 European, American, Asia Pacific, Middle East and African countries.

Herein, we tracked, analyzed and reported the state of broadband pricing 1H2025 across the 50 EU&OECD markets where we have been tracking mobile prices. In our mobile price comparison study series, we moved from bi-annual tracking to annual tracking in 2022. Between 2014 and 2021 we tracked mobile prices twice per year. Thereafter once a year. This is the third year (2023, 2024 and 2025) we tracked, analyzed and reported broadband prices across the 50 EU&OECD markets.

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<sup>1</sup><https://rewheel.fi/research>

<sup>2</sup>[https://ec.europa.eu/commission/presscorner/detail/en/speech\\_13\\_168](https://ec.europa.eu/commission/presscorner/detail/en/speech_13_168)

<sup>3</sup><https://rewheel.fi/research>

<sup>4</sup><https://rewheel.fi/research>

<sup>5</sup><https://rewheel.fi/research>

<sup>6</sup><https://rewheel.fi/research>

## 1.1 50 European, American, Asia Pacific, Middle East and African countries included in the comparison

In the 1H2025 we tracked and analyzed broadband plan prices across 50 European, American, Asia Pacific, Middle East and African countries. The 50 countries included in the comparison are listed in the table below. The 50 countries 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	Country 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
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
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	Luxemburg
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 our 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-own 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) broadband country-wide connectivity and mobile (5G&4G) broadband country-wide connectivity. For more details, please see the subsections below.

### 1.2.1 Backward compatibility with the 1H2024 and 1H2023 broadband comparison studies

Please note that in this third release we have refined the mobile broadband peak speed rule, the minimum data volume allowance eligibility rule, and the fees that are included in the monthly price of the service such as one-off and equipment (modem-WiFi-router) fees. We retroactively applied the new rules to the first 1H2023 and second 1H2024 releases. Therefore, historic 2024 and 2023 values might differ - typically will be lower - between this latest release and previous releases.

### 1.2.2 Broadband plans tracked and analyzed in this third release 1H2025

Herein, we 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 gigabyte 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 here as FTTx such as a combination of cable, DSL and fiber) and 5G or 4G mobile networks. Broadband plans delivered over satellite networks or broadband plans delivered by fixed wireless access technologies other than 5G or 4G were ineligible.

This third release 1H2025 contains 1 674 broadband plans. 1 401 of those were fixed broadband (FBB) plans, 231 were mobile broadband (MBB) plans and 42 were 5G or 4G fixed wireless access (FWA) plans. 1 545 out of the 1 674 plans were broadband plans with unlimited data volume while 128 plans were plans with finite data volumes of at least 1 000 gigabytes.

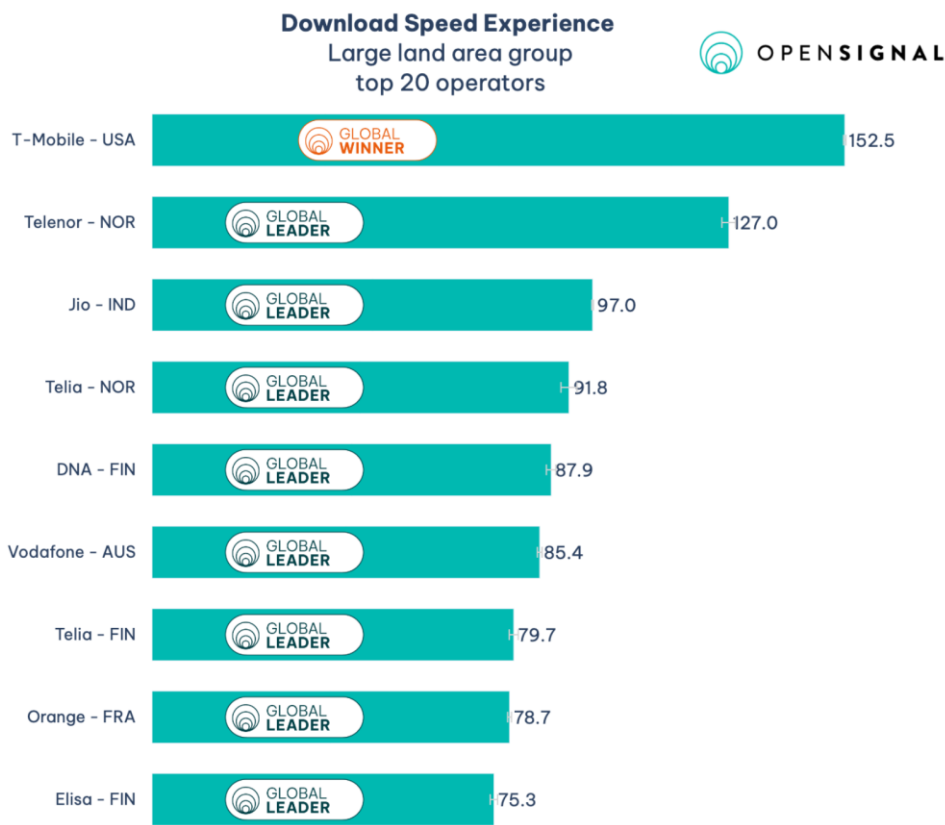
According to Rewheel's methodology 5G or 4G fixed wireless access (FWA) plans were plans that included an outdoor unit (i.e., external antenna). Plans delivered over 5G or 4G networks without an external antenna were designated as mobile broadband plans (MBB) in the database irrespective of the provider's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

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

We designated full fiber or hybrid-fiber broadband plans that were advertised with download speeds of at least 1 Gbit/s as plans with Gigabit download speeds. In some markets providers beside stating the advertised speed they also informed consumers about the *typical peak hour* speed - which was lower than the advertised speed - or the *guarantee 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 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” we logged a typical download speed of 50 Mbit/s for 4G and 100 Mbit/s for 5G broadband plans. Hence, in the metrics comparing the prices of broadband plans with 1 Gbit/s or Gigabit (1 or more Gbit/s) or multi-Gigabit (2 or more Gbit/s) download speeds only 18 out of the total 554 plans were 5G FWA plans, the remaining 536 were fiber-based FBB plans.

As seen in the chart below, according to Opensignal<sup>7</sup> under typical usage conditions, the average download speed experience of 5G users does not exceed 200 Mbit/s.



1.2.4 Collection methods and broadband plan detailed eligibility rules

Plan details were collected from the service providers’ websites during April and May 2025. We archived screenshots from every single service provider plan that was used in the comparative analysis and as well downloaded and archived the plan terms and conditions wherever needed and readily available.

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 will 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.

We logged the retail price of all naked broadband internet access plans for all eligible technologies, speeds and data volumes. For a small number of providers that did not sell naked broadband internet access plans or limited the naked plans to lower speeds we also logged the cheapest available bundled plan for each available higher download speed. For example, a provider sold naked broadband plans with 100, 300 and 500 Mbit/s download speed and a plan with 1 Gbit/s download speed bundled with a Netflix

<sup>7</sup>[https://www.opensignal.com/2025/02/27/global-mobile-network-experience-awards-2025/dt#2025\\_global\\_awards\\_final\\_v9\\_Download%20Speed%20Experience\\_Large\\_bar\\_chart](https://www.opensignal.com/2025/02/27/global-mobile-network-experience-awards-2025/dt#2025_global_awards_final_v9_Download%20Speed%20Experience_Large_bar_chart)



subscription. We logged in the database all four plans for this provider 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 have been 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 or FWA), the access type (FTTH, FTTx, 5G, 4G), 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

In the first 1H2023 and second 12024 release, similarly, to our mobile voice-data plan comparison studies we used a 12-month contract duration for calculating the monthly price of broadband plans and any applicable discounts. For example, if a plan had no contract duration and the provider gave the first month for free then we multiplied the monthly fee by 11 months and divided by 12 months to derive the average fee over a 12-month period. Moreover, in the first 1H2023 and second 12024 release, similarly, to our mobile voice-data plan comparison studies we did not include in the monthly fee any one-off activation fees, upfront fees for the purchase of equipment such as modems, WiFi routers, modems with WiFi router capability, etc.

The rationale was that such one-off fees did not significantly increase the monthly price. While this is still the case for mobile voice-data subscriptions for broadband connections the effect of one-off fees on the monthly fee is more nuance. For example, most providers of broadband internet access connections include in the monthly fees the cost a basic modem-WiFi-router. However, a significant number of providers, around one-third, charge extra for the basic modem-WiFi-router. Moreover, while the upfront cost of a basic modem-WiFi-router for fixed broadband connections with up to 1 Gbit/s speed or 4G mobile broadband connections is around 50 Euro (i.e., typically equal to approximately one additional monthly fee in a 24-month contract), the cost for modem-WiFi-routers for fiber connections with Gigabit speeds (e.g., 10 Gbit/s speed) or 5G FWA connections with outdoor units could be as much as 500 Euro, i.e., 10 times higher than basic modem-WiFi-routers.

Therefore, in this third release we have revised the methodology and included one-off fees and as well equipment fees in the monthly cost by amortizing them, in case they were lump-sums or partial lump-sums, during a 24-month contract period.

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 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.

When calculating the average monthly fee for a broadband plan we have included the following fees. The monthly fee for the broadband plan including any discounts amortized for a 24-month period, one-off registration, activation, installation or other mandatory fees amortized for a 24-month period, upfront equipment fees amortized for a 24-month period or monthly invoiced equipment fees, one-off equipment shipping fees amortized for a 24-month period and any other regulatory or commercial (e.g., some operators charge a so called “network investment” supplementary) monthly fees.

We have included in the monthly fee only mandatory installation fees. Optional installation fees were not included. When providers offered a cheaper “install it yourself” option we selected that cheaper option over the more expensive “professional installation” option.

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

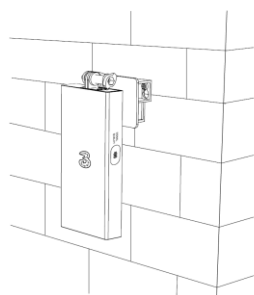
We have NOT included in the monthly fee the typical optional cost for a latest WiFi router (WiFi 7 or 8) or the cost for a Mesh WiFi network that provides full coverage in large apartments and detached houses unless the provider has bundled the cost for such equipment on its plans and consumers had no 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 we added the cheapest basic modem-WiFi-router sold separately by the provider.

For 5G FWA plans with an outdoor unit we included the installation cost for the external antenna 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 installation<sup>8</sup> 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.



<sup>8</sup><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 plan prices. Prices in EUR are the retail prices found on the service provider websites. Prices in other national currencies have been converted to EUR by simply using the exchange rate 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 fluctuate from 0.74 to 0.96 as seen in the table below. In this latest release historic US prices (i.e., 1H2023 and 1H2024 prices) were converted to EUR using a flat 0.96 exchange rate. Due to massive fluctuation of the Turkish lira - the Turkish lira has been devalued by more than 10 times, from 0.31 to the Euro in 2016 to less than 0.025 by 2025 – historic prices in Turkey are converted to Euro using the exchange rate of the respective release.

EU OECD		Code	Country Name	1H14	2H14	1H15	2H15	1H16	2H16	1H17	2H17	1H18	2H18	1H19	2H19	1H20	2H20	1H21	2H21	1H22	1H23	1H24	1H25
No	Yes	US	United States	0.7400	0.7900	0.8900	0.9100	0.8900	0.8900	0.9300	0.8500	0.8100	0.8600	0.8900	0.9100	0.9200	0.8600	0.8400	0.8500	0.9500	0.9300	0.9400	0.9600

Please note that the Bulgarian Lev (BGN) is pegged to the Euro while the Danish kroner (DKK) is semi-pegged to the Euro with a fluctuation band of +/- 2.25%. Herein, we have historically considered the Danish kroner to have a fixed exchange rate with the Euro of 0.13. The Romanian New 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 using Euro prices.

EU OECD		Code	Country Name	1H25
Yes	Yes	AT	Austria	1.0000
No	Yes	AU	Australia	0.6100
Yes	Yes	BE	Belgium	1.0000
Yes	No	BG	Bulgaria	0.5100
No	No	BR	Brazil	0.1600
No	Yes	CA	Canada	0.6700
No	Yes	CH	Switzerland	1.0500
No	Yes	CL	Chile	0.0010
No	Yes	CO	Colombia	0.0002
Yes	No	CY	Cyprus	1.0000
Yes	Yes	CZ	Czechia	0.0400
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
Yes	No	HR	Croatia	1.0000
Yes	Yes	HU	Hungary	0.0025
Yes	Yes	IE	Ireland	1.0000
No	Yes	IL	Israel	0.2700
No	No	IN	India	0.0110
No	Yes	IS	Iceland	0.0068
Yes	Yes	IT	Italy	1.0000
No	Yes	JP	Japan	0.0064
No	Yes	KR	Korea	0.0007
No	No	KW	Kuwait	2.9900
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	0.0470
No	No	MY	Malaysia	0.2074
Yes	Yes	NL	Netherlands	1.0000
No	Yes	NO	Norway	0.0860
No	Yes	NZ	New Zealand	0.5500
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	0.2500
Yes	Yes	SE	Sweden	0.0900
No	No	SG	Singapore	0.6900
Yes	Yes	SI	Slovenia	1.0000
Yes	Yes	SK	Slovakia	1.0000
No	Yes	TR	Turkey	0.0250
No	Yes	UK	United Kingdom	1.2100
No	Yes	US	United States	0.9600
No	No	ZA	South Africa	0.0500

### 1.2.7 Definitions of metrics used to analyze broadband prices

The following metrics were used to analyze the broadband plan prices. The metrics were applied to broadband markets, groups of broadband markets (e.g. EU 27 markets), operator groups (that control more than one network operator in several markets), and network operators (with several service providers such as main brand, sub-brands and virtual network operators VNOs that used their infrastructure).

- a) Median monthly price among all eligible plans that met a predefined download speed range (e.g., 1 to 50 Gbit/s i.e., Gigabit plans or 10 Mbit/s to 50 Gbit/s i.e., all plans), a predefined data volume range (e.g. 1 000 to 5 000 gigabytes or 1 000 to unlimited data volume i.e., all plans) and a predefined monthly price range (e.g. 0 to 30 Euro or 0 to 1 000 Euro i.e., all plans).
- b) Minimum monthly price among all eligible plans that met a predefined download speed range (e.g., 1 to 50 Gbit/s i.e., Gigabit plans or 10 Mbit/s to 50 Gbit/s i.e., all plans), a predefined data volume range (e.g. 1 000 to 5 000 gigabytes or 1 000 to unlimited data volume i.e., all plans) and a predefined monthly price range (e.g. 0 to 30 Euro or 0 to 1 000 Euro i.e., all plans).
- c) Median download speed among all eligible plans that met a predefined download speed range (e.g., 1 to 50 Gbit/s i.e., Gigabit plans or 10 Mbit/s to 50 Gbit/s i.e., all plans), a predefined data volume range (e.g. 1 000 to 5 000 gigabytes or 1 000 to unlimited data volume i.e., all plans) and a predefined monthly price range (e.g. 0 to 30 Euro or 0 to 1 000 Euro i.e., all plans).

By limiting the predefined monthly price range between 0 and for example 30 Euro we could capture the price competitiveness of each broadband market for an important sub-set of plans with affordable monthly fees across all customer segments including those with the lowest monthly disposable incomes such as students, unemployed or single parents on minimum wages.

The automated formulas in Rewheel's PRO spreadsheet could calculate the metrics above by including plans from all or selected technologies (FBB, MBB, FWA) and from all service providers or selected brand types of service providers (main, sub-brand and VNO) or any combination of the total five filters (speed range, data volume range, price range, technology type and brand type).

### 1.2.8 Number of broadband (fixed & mobile) network operators and service providers included

In this third release 1H2025 we logged broadband plan prices from a total of 255 network operators and a total of 337 service providers. In the second release 1H2024 we logged broadband plan prices from a total of 255 network operators and a total of 316 service providers. In the first release 1H2023 we logged broadband plan prices from a total of 239 network operators and a total of 282 service providers.

## About Rewheel

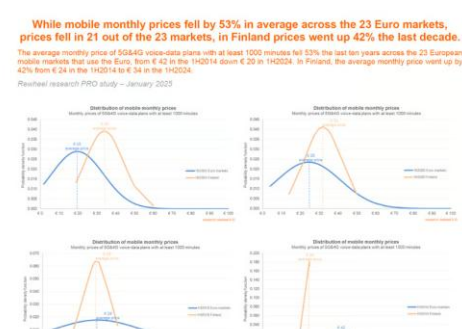
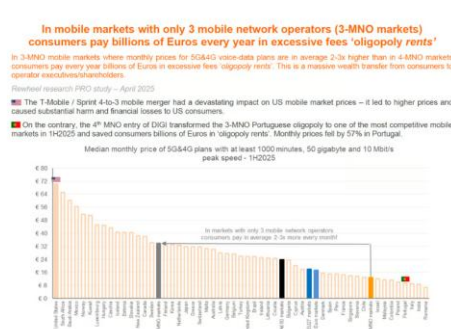
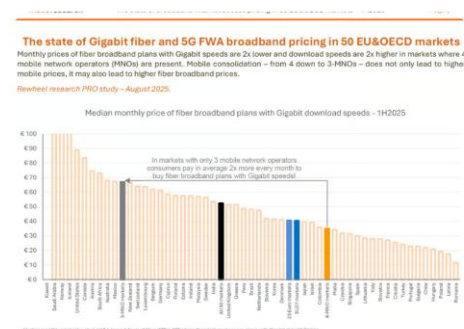
Founded in 2009 and incorporated in Finland, Rewheel is a privately owned independent telecom research & advisory firm. Rewheel's clients are mobile network operators, telco groups, MVNO groups, competition authorities, telecom sector regulators, governments, global internet firms, mobile data-centric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

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### 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.

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