

Mobile and Fixed Broadband Prices in Europe in 2021

The study provides comprehensive data on 2021 retail prices of fixed and mobile broadband offers for consumers in the EU27, the United Kingdom, Iceland, Norway, Japan, South Korea and the USA.



The five largest Internet Service Providers (ISPs) and the two or three largest Mobile Network Operators (MNOs) in each country were included. Data was collected from ISP and MNO websites within a period of three weeks, from 4th to 24th October 2021.

The baskets defined in the study follows the guidelines issued by the Body of European Regulators for Electronic Communications (BEREC). The set of baskets cover 5 fixed broadband baskets of different download speeds and 5 mobile broadband baskets (for tablet/modem/data card use) of different download volumes purchased individually (stand-alone), 7 individual mobile handheld baskets with voice telephony and a set of 17 baskets for representative households.

To support valid cross-national comparison of retail prices of fixed and mobile broadband offers in each bundle and basket, consistent price normalisation procedures were applied. These take full account of features such as one-off fees, volume limits, discounts, different contract durations and limits for telephony call time and data volumes.

Applying the normalised prices in euro in Purchasing Power Parity (€/PPP), the least expensive countries for fixed broadband in the EU in 2021 were Lithuania, Romania, Bulgaria and Latvia. Prices differ considerably between the least and most expensive countries in the EU.

Fixed Broadband prices show mixed trends in 2021.

- Retail prices for Single Play offers slightly decreased in the 12-30 Mbps (-1.18%) and 30-100 Mbps (-2.31%) baskets. A significant decrease is observed in the 100-200 Mbps (-5.74%) basket

and in the top speed basket >200 Mbps (-9.08%).

- Retail prices for bundles, which include fixed telephony experienced on average the most significant decrease among all fixed broadband baskets (-8.58% in the 12-30 Mbps basket; -10.07%, 30-100 Mbps basket; -9.74%, 100-200 Mbps; -10.03%, >200 Mbps).
- Retail prices for Triple Play offers decreased in all baskets: by 6.11% (12-30 Mbps basket), by 5.57% (30-100 Mbps basket), by 6.79% in the 100-200 Mbps basket and by 7.83% in the 200 Mbps.

The comparison of EU27 prices with prices in selected non-European countries in 2021 yielded the following picture:

- South Korea shows the least expensive offers for Single Play and Double Play with Telephony.
- The EU27 has the lowest prices for Triple Play offers among all speed categories compared to Japan, South Korea, the USA, Norway, Iceland and the United Kingdom.
- South Korea, on the other hand, shows lower prices for Standalone and Double Play offers in the top speed baskets 100-200 Mbps and >200 Mbps.
- Prices for bundles in all speed baskets are lower in the EU27 than in Japan, the USA, Norway, Iceland, and the UK.

Following BEREC Guidelines, the study also monitors **converged bundles**, that is, bundles of usage including both mobile broadband services (data and voice) and fixed access products.

Comparing normalised prices in euro (€/PPP), Romania, Lithuania, Slovenia and Bulgaria exhibit the most attractive prices for converged offers in the EU. Prices differ considerably between the least and most expensive countries in the EU.

Prices for all converged bundles are lower in the EU27 than in the USA, Norway, Iceland, Japan, South Korea, and (apart from basket HH16, 100 – 200 Mbps, fixed voice, 2 SIM, 5 GB, 300 calls, TV) in the United Kingdom.

On the EU level, prices became cheaper than last year among all household baskets in each usage/speed category.

Comparing normalised prices in euro (€/PPP), the least expensive countries for mobile broadband in the EU are Romania, Spain, Poland and Estonia. Prices differ considerably between the least and most expensive countries in the EU.

Mobile broadband was found to be less expensive than in October 2020 with prices being around 10% lower in the baskets with a data allowance >2 GB.

Comparing the EU27 average in the handset baskets reveals a similar trend. Prices in all baskets experienced a decrease between 14.8% and 22.5%.

Comparison of EU27 prices with prices in selected non-EU countries (the UK, Iceland, Norway, Japan, South Korea and the USA) in 2021 showed that, on average, mobile broadband in the EU27 is more expensive than in the United Kingdom, among all usage baskets, and Iceland, for the handset-based baskets.

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