

The Mobile Economy Europe

Unique mobile subscribers



2024 **520m**
88% penetration rate*

2030 **527m**
89% penetration rate*

CAGR 2024-2030 | **0.2%**

*Percentage of population

Mobile internet users



2024 **471m**
79% penetration rate*

2030 **494m**
84% penetration rate*

CAGR 2024-2030 | **0.8%**

*Percentage of population

SIM connections



(excluding licensed cellular IoT)

2024 **795m**
134% penetration rate*

2030 **816m**
138% penetration rate*

CAGR 2024-2030 | **0.4%**

*Percentage of population

4G

Percentage of connections (excluding licensed cellular IoT)

2024 **63%**

2030 **18%** ↓

5G

Percentage of connections (excluding licensed cellular IoT)

2024 **30%**

2030 **80%** ↑

Smartphones

Percentage of connections



2024 **83%**

2030 **91%** ↑

Operator revenues and investment



2024 **€163bn**
Total revenues

2030 **€177bn**
Total revenues

Operator capex for the period 2024-2030: **€175bn**

Public funding



2023 **€120bn**

Mobile ecosystem contribution to public funding (before regulatory and spectrum fees)

Licensed cellular IoT connections



2024 **322m**

2030 **545m**

Mobile ecosystem contribution to GDP



2023 **€1.1tn**
5.0% of GDP

2030 **€1.2tn**

Employment



2023 **1.9m jobs**
Directly supported by the mobile ecosystem

Plus **1.4m indirect jobs**