Public views on connectivity in Europe

February 2026

Acknowledgements

Contents

About the project

Debating Europe is the citizen engagement unit of **Friends of Europe,** an independent Brussels-based think tank working for a more inclusive, sustainable, and forward-looking Europe. We have collaborated with **Vodafone** to carry out an online survey between 30 October and 18 November 2025 to better understand **how citizens across Europe perceive the state of digital connectivity and its evolving impact on society**. It draws on insights from **2,000 participants** aged 18 to 65, surveyed across four EU Member States – **Germany**, **Greece**, **Portugal** and **Romania** - providing a comparative picture of public attitudes towards connectivity, digital infrastructure and their broader social and economic implications. When referring to a country or its people, we strictly refer to the survey participants and not to the entire population.

Key findings

People in Germany, Greece, Portugal and Romania view digital connectivity as **essential for everyday tasks like paying bills and keeping in touch with family and friends**. They also see it as **vital for economic participation and ensuring national security**. There is strong public support in all four countries for investment in next-generation networks and a clear expectation that improved connectivity will boost jobs, services and the prospects for small business.

Portugal and Greece are consistently the most positive about the benefits of digital infrastructure, with Germany displaying more caution. Romania shows distinct patterns, including higher reliance on mobile data, stronger support for online healthcare and higher trust in private-sector actors.

Major concerns across all countries include cybersecurity, the resilience of critical infrastructure and uneven levels of service between rural and urban populations. **The European Union is the most trusted entity** to ensure secure, reliable networks. **National governments** are the least trusted, with telecoms operators and tech companies enjoying moderate support. There is also a strong preference for **Europe to pursue digital sovereignty**, particularly from the US and China.

debating europe

1

Digital inclusion: everyday internet use

Across all four countries, the study paints a clear picture of **digital connectivity as a core enabler of daily life and economic activity**. Half of respondents regarded internet access as absolutely essential for a range of everyday tasks, from work and education, to managing finances and communicating with family and friends. While more than one-third of respondents in each country felt connectivity was vital for organising travel, they were less likely to use the internet for other daily tasks such as accessing healthcare, shopping and commuting.

Within the broader picture, differences emerged between the countries. **Greece and Portugal were the most internet-reliant countries**, with larger numbers saying connectivity was essential or very important for their everyday lives This was particularly true of work and education, with more than 60% in those countries saying being online was essential compared with 37% in Romania and 47% in Germany. Respondents in Greece were also the most likely to label connectivity as essential for accessing healthcare and public services. **Germany emerged as the least reliant country**, particularly regarding healthcare and shopping, which both scored less than 20%, far lower than in other countries.
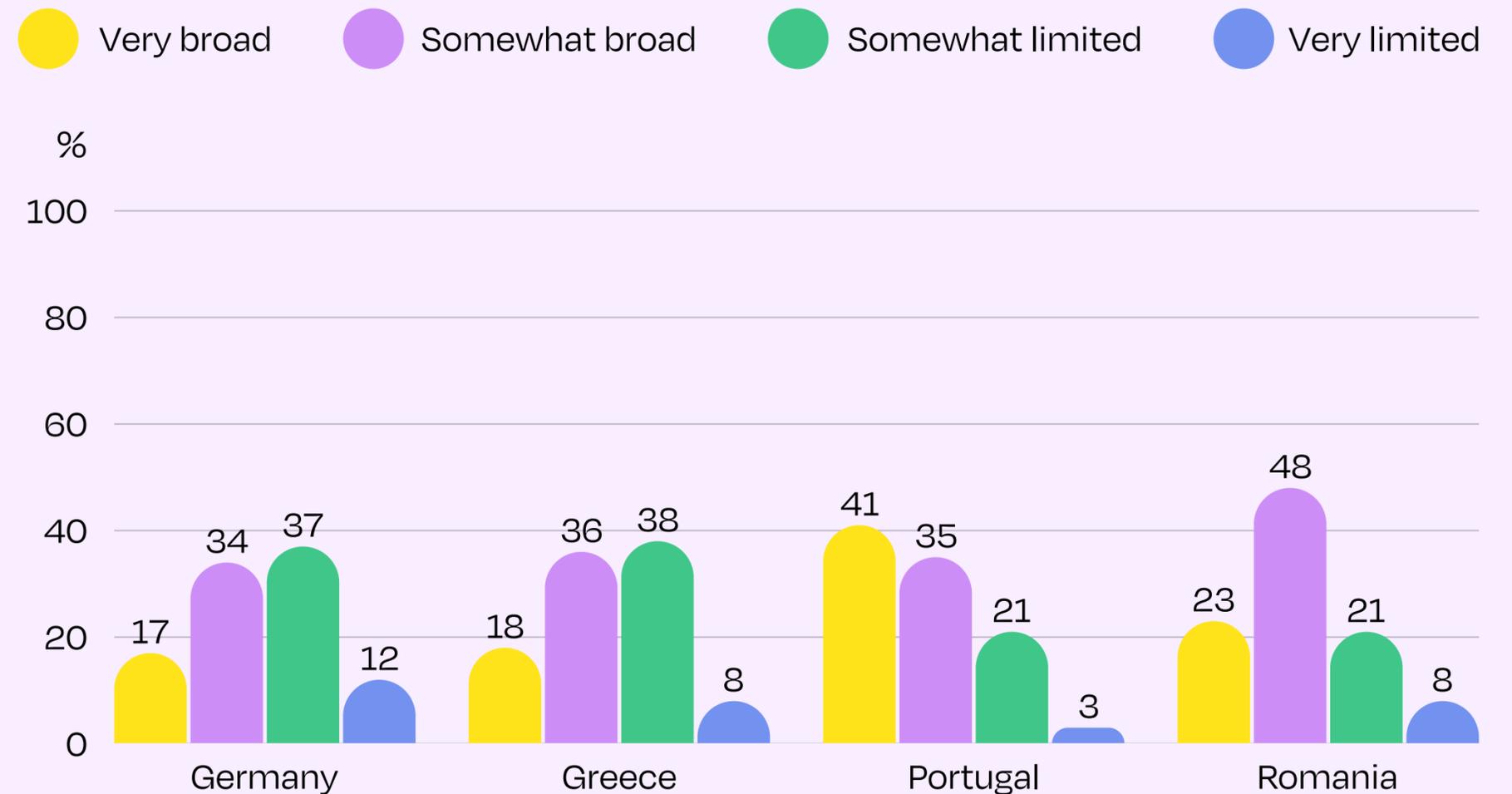
Online banking was the most valued service in Germany, Greece and Portugal. Between 40% and 50% ranked it as number one. Access to government services and online shopping were the next most valued services in these three countries, with medical information scoring lowest. Romania was the outlier, where no single service was regarded as hugely more important than the others.

Across all four countries, **fixed broadband was the main link to the internet**. More than 70% of respondents in Germany, Greece and Portugal said it was the principal way they got online. Romania was the outlier once again. While fixed lines were still the norm in the eastern European country, the figure was much lower at 48%. More than one-third of Romanians said they relied on mobile data as their main connection, much higher than in the other three countries. Mobile data is widely used as a secondary option across all countries, with public Wi-Fi and workplace Wi-Fi consistently ranked as last options. However, these last options remain popular, particularly in Romania and Portugal.
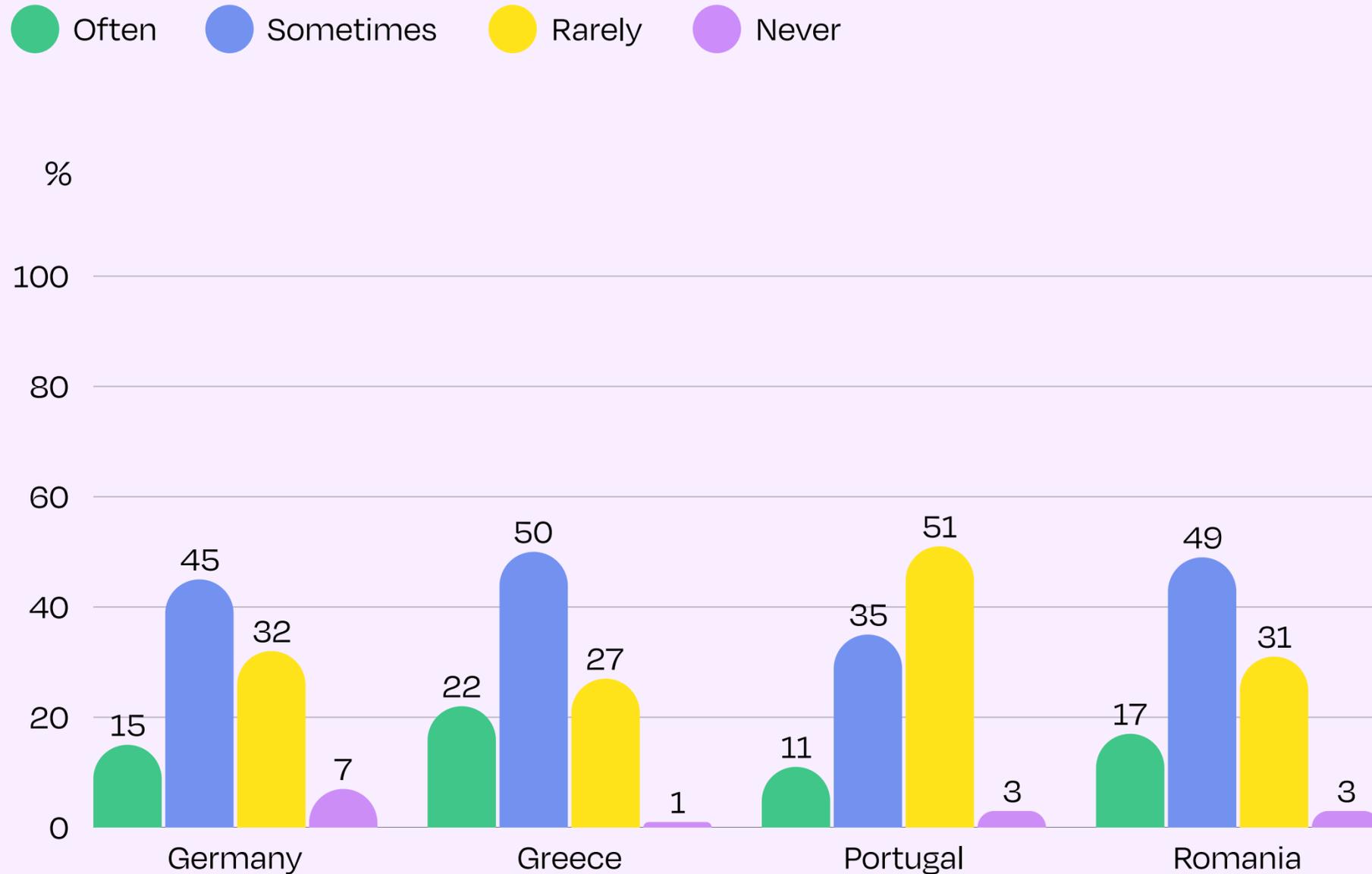
Portugal and Romania were the happiest with their mobile and home internet providers, with 90% and 88% respectively rating **mobile services** as excellent or good and 85% and 90% for their home internet. This compared with three-quarters in Germany (75%) and almost two-thirds in Greece (62%) for mobile internet, and 77% and 66% for home internet.

The same dynamic played out when respondents were asked how they felt about the market in their countries for **home internet services**. More than two-thirds in Portugal (76%) and Romania (71%) said there were plenty of providers to choose from, compared with around half in Germany (51%) and Greece (54%).

Participants' views on the availability of providers in their area for good, affordable home internet service

- Very broad
- Somewhat broad
- Somewhat limited
- Very limited

%

Germany: 17, 34, 37, 12
Greece: 18, 36, 38, 8
Portugal: 41, 35, 21, 3
Romania: 23, 48, 21, 8

Impact of slow or unreliable internet on daily activities

● Often   ● Sometimes   ● Rarely   ● Never

%

	Germany	Greece	Portugal	Romania
Often	15	22	11	17
Sometimes	45	50	35	49
Rarely	32	27	51	31
Never	7	1	3	3

Respondents in Greece (72%) were also the most likely to report that slow or unreliable connections affected their daily lives, including activities such as work or education, paying bills and managing finances, accessing healthcare and other public services, shopping and ordering essentials, communicating with family and friends, and meeting travel or commuting needs. This compared with figures of 67% in Romania, 60% in Germany and 46% in Portugal.
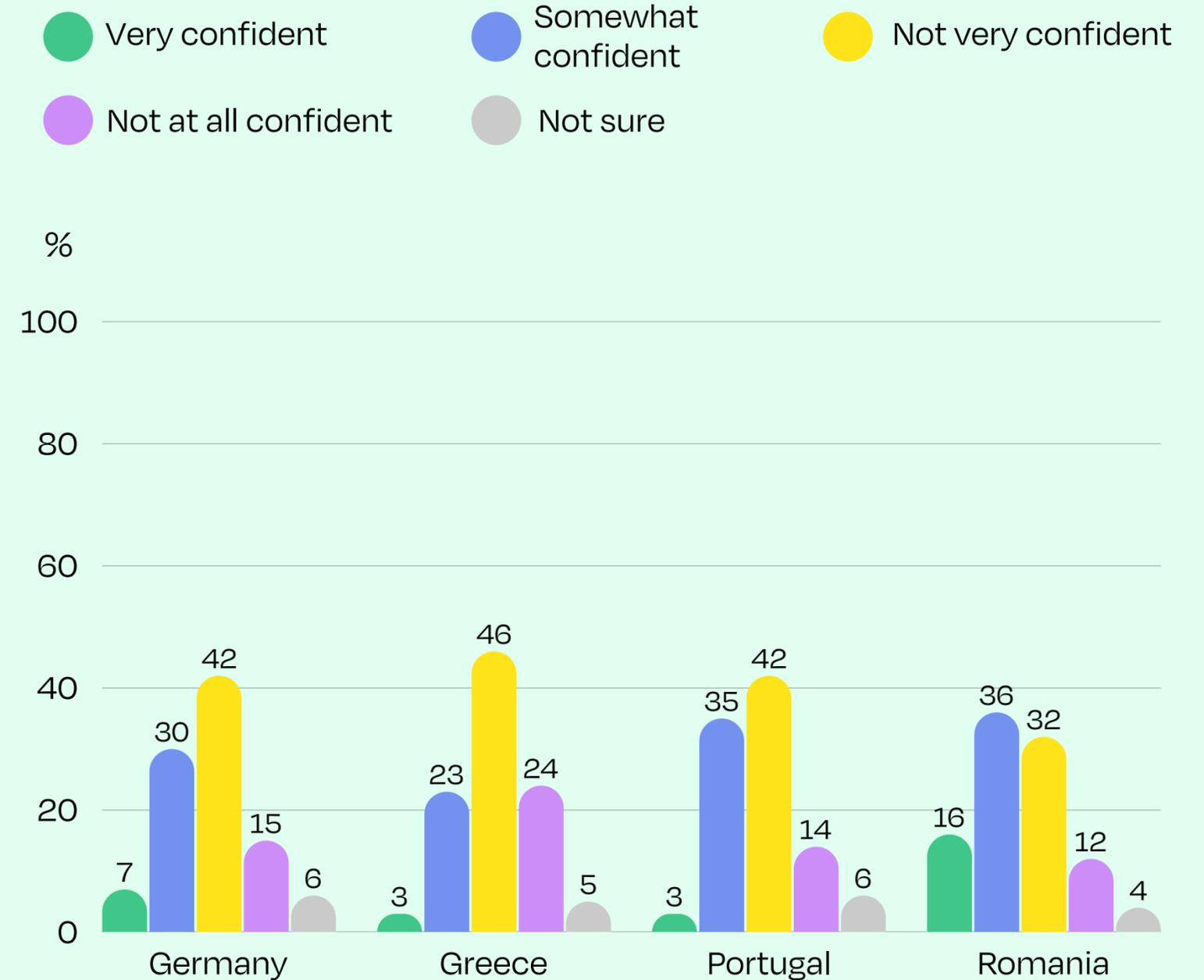
9

debating europe

2

Digital inclusion: access for all

Respondents in Portugal (76%), Germany (58%) and Greece (49%) believed overwhelmingly that **rural and urban areas were not enjoying the same level of internet connectivity.** Tiny minorities said they did not believe such a divide existed – 13% in Germany, 10% in Greece and 3% in Portugal. Respondents in Romania, however, were more evenly divided. While 23% believed there was a divide, 41% did not.

The survey also suggested that **government policies were not meeting public expectations** regarding coverage, infrastructure and affordability. Respondents had low confidence that government decisions were adequately reflecting their connectivity needs in both urban and rural contexts. This was particularly true of Greece, with 70% saying they were either not very or not at all confident. Germany and Portugal also report limited confidence (37% of respondents in Germany, and 38% in Portugal), with **Romania registering the highest trust levels** (52%).

Confidence in government decisions on connectivity

- 🟢 Very confident
- 🔵 Somewhat confident
- 🟡 Not very confident
- 🟣 Not at all confident
- ⚪ Not sure

%

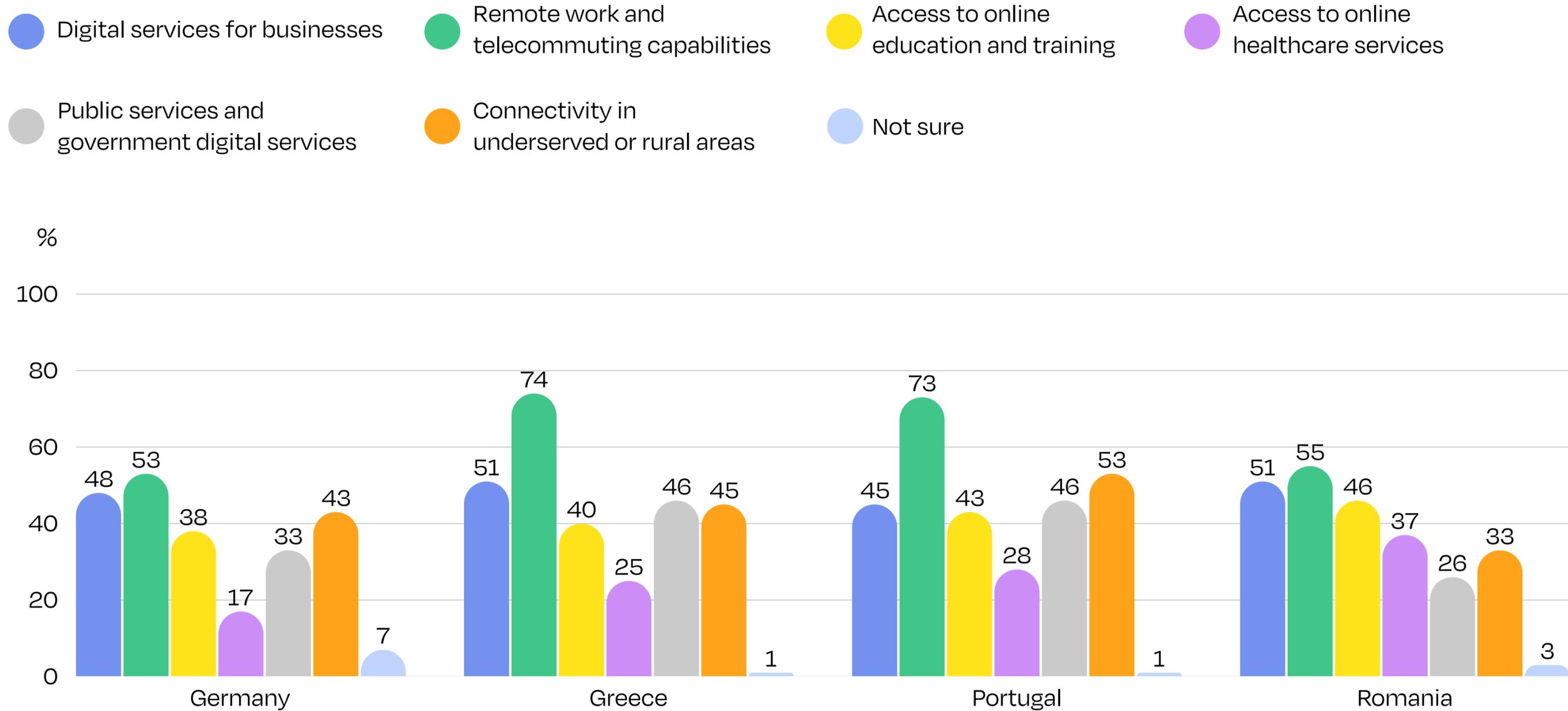|	Very confident	Somewhat confident	Not very confident	Not at all confident	Not sure
Germany	7	30	42	15	6
Greece	3	23	46	24	5
Portugal	3	35	42	14	6
Romania	16	36	32	12	4

3

A competitive Europe for all

Internet connectivity was seen as critical for the success of small businesses across all four countries, particularly through the provision of stable internet and access to digital services. A stable internet connection was seen as very important by 72% of Germans, 76% of Greeks, and 76% of Portuguese respondents, while access to digital services was rated as very important by 56% in Germany and 71% in both Greece and Portugal. Romanians were more muted in their support with 58% considering a stable internet connection very important, and 55% feeling the same about access to digital services.
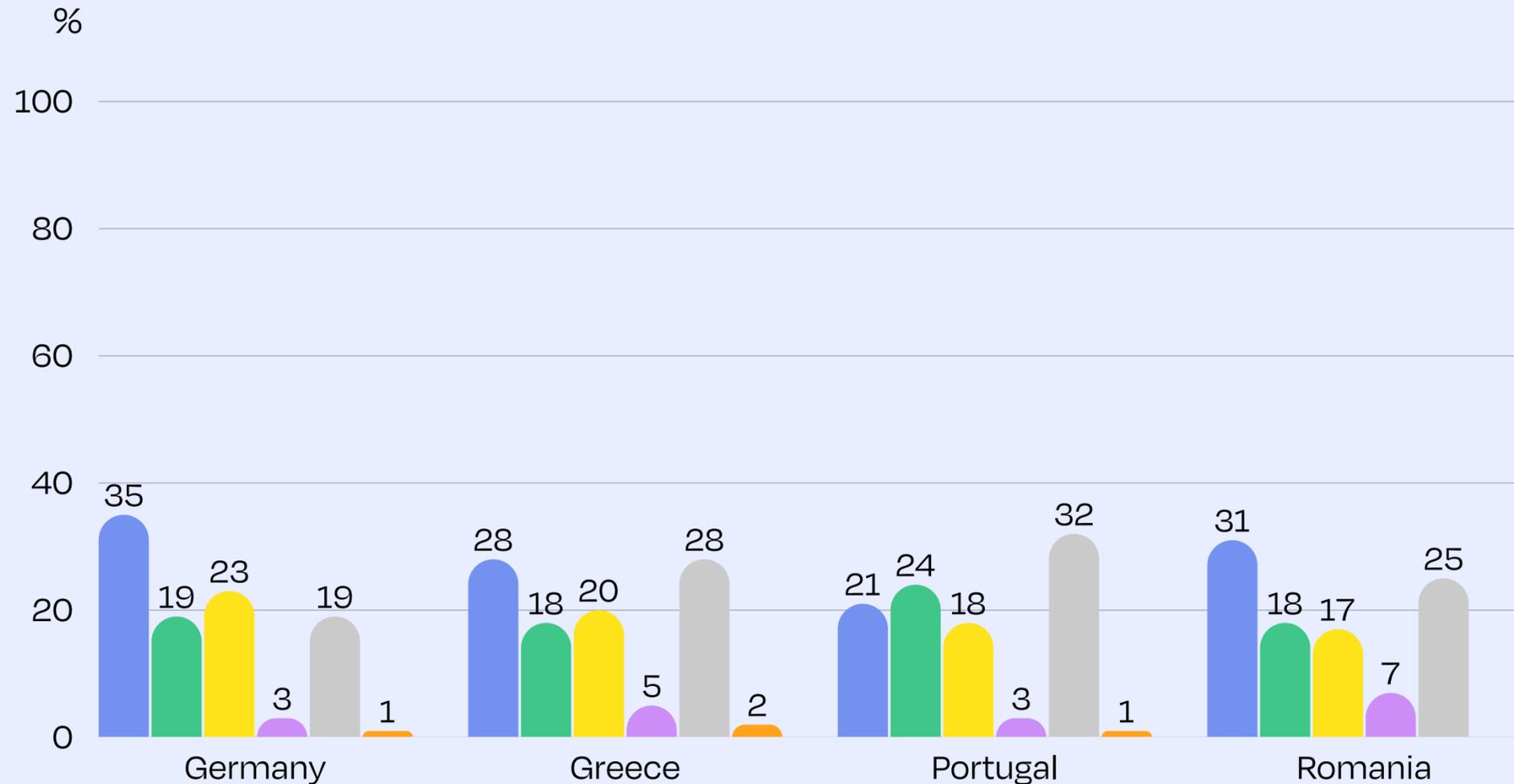
Respondents consistently felt these **digital needs were more vital than traditional business requirements** like location, transport links, and even tax relief. Overall, Greece and Portugal placed the greatest emphasis on the power of digital tools, while Germany and Romania expressed similar priorities but with less intensity.

When asked which aspect of digital connectivity was likely to bring the most positive economic impact, the answer was clear: **enabling remote work and telecommuting** was consistently the top choice, particularly in Greece and Portugal. Supplying **digital services to businesses** was next, followed by **online education and training**. Other options on the list showed far greater variation across the countries. While respondents in Romania ranked the economic potential of online healthcare highly, Portugal preferred the idea of bringing better connectivity to rural and underserved communities.

Areas of digital connectivity with the greatest economic impact

Legend:
- ● Digital services for businesses
- ● Remote work and telecommuting capabilities
- ● Access to online education and training
- ● Access to online healthcare services
- ● Public services and government digital services
- ● Connectivity in underserved or rural areas
- ● Not sure

%

	Germany	Greece	Portugal	Romania
Digital services for businesses	48	51	45	51
Remote work and telecommuting capabilities	53	74	73	55
Access to online education and training	38	40	43	46
Access to online healthcare services	17	25	28	37
Public services and government digital services	33	46	46	26
Connectivity in underserved or rural areas	43	45	53	33
Not sure	7	1	1	3

14

Key digital areas to strengthen the economy

Legend:
- 🔵 Better digital connectivity
- 🟢 Education/training
- 🟡 EU digital independence
- 🟣 Satellite technology
- ⚪ Support small businesses
- 🟠 Other

%

Germany: 35, 19, 23, 3, 19, 1
Greece: 28, 18, 20, 5, 28, 2
Portugal: 21, 24, 18, 3, 32, 1
Romania: 31, 18, 17, 7, 25
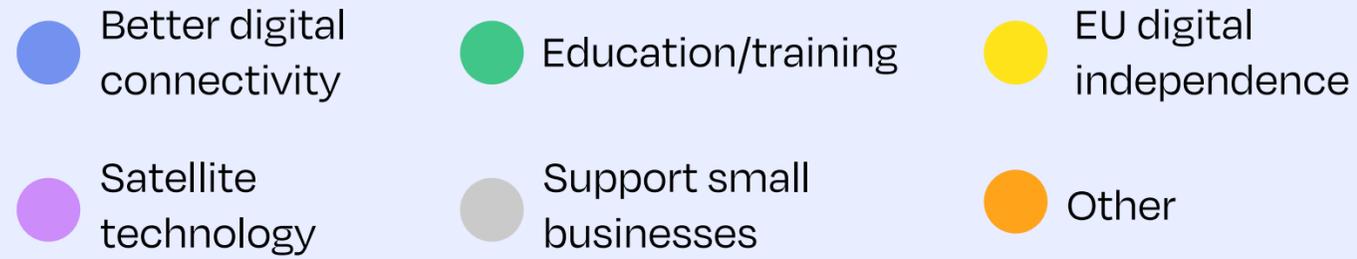
Comparing digital connectivity to other policy priorities also drew out significant differences between countries. When asked to choose the top priority for strengthening the national and European economy, Germany and Romania tended to emphasise **better digital connectivity**. Portugal felt **support for small businesses** was more crucial. Greece was more evenly split between the two options.

15

Across all four countries, a clear majority of respondents expected **improvements in 5G networks, more reliable broadband and high-speed internet to have a positive impact on their working lives**, with the combined share of those reporting very positive and somewhat positive expectations reaching 71% in Germany, 82% in Greece, 87% in Portugal and 83% in Romania. Portugal was particularly optimistic, with more than half of respondents (54%) saying they were very positive about better connectivity. At the other end of the scale, expectations were more tempered in Germany, where less than one-third (32%) said they were very positive.
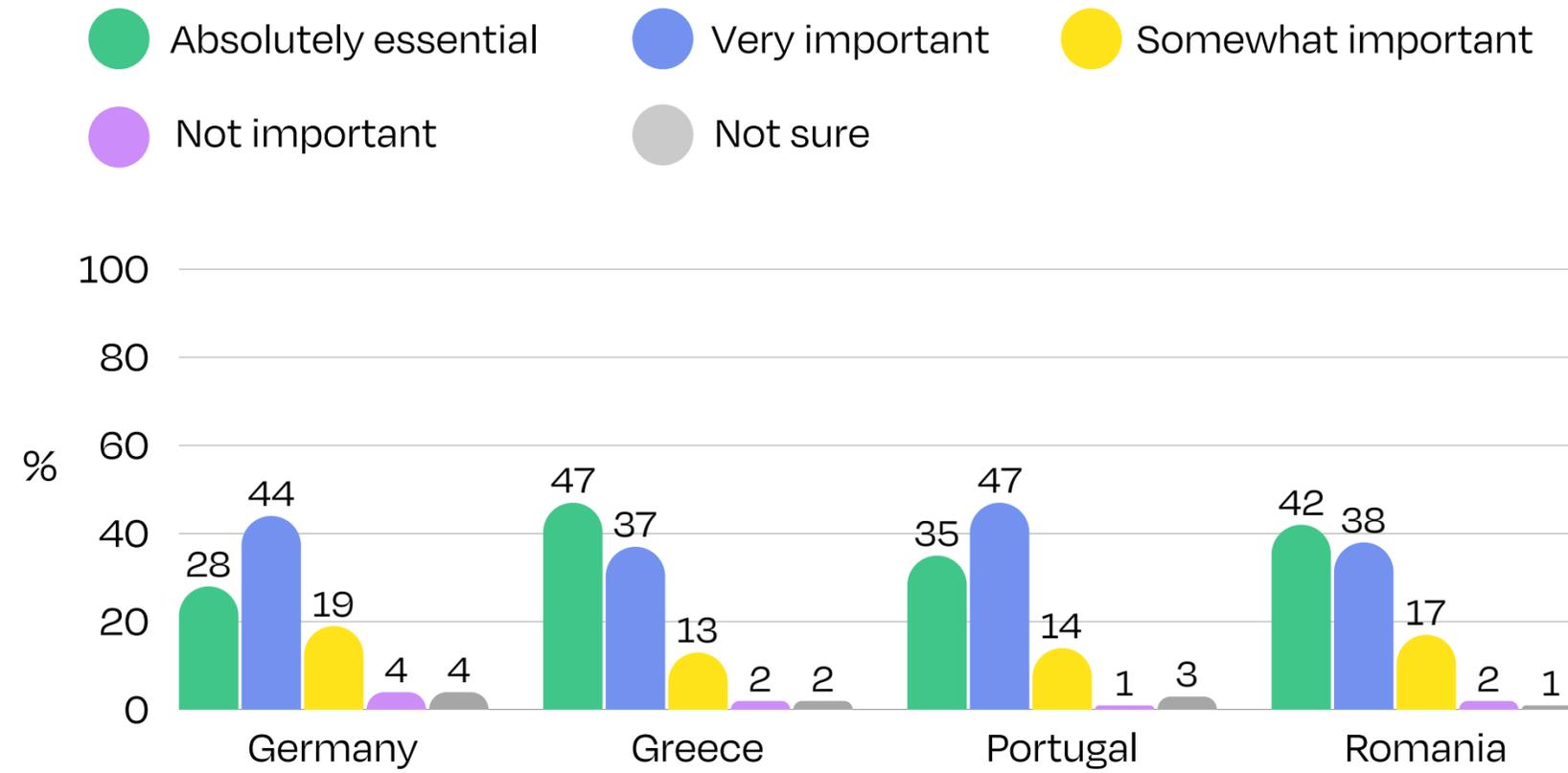
On the wider benefits of improved connectivity, respondents expected improvements for emergency services and remote working. Greece and Portugal were the most optimistic, with Romanians also expecting a considerable impact. Germans tended to be more cautious, expecting the impact to be moderate rather than considerable. Very few respondents in any of the four countries said they expected no impact, indicating **broad agreement that advanced networks will be transformative**.

Impact of improved digital connectivity on jobs

Legend:
- Very positive
- Somewhat positive
- No impact
- Somewhat negative
- Very negative
- Unemployed respondant
- Not sure

%

Germany: Very positive 32, Somewhat positive 39, No impact 17, Somewhat negative 2, Very negative 1, Unemployed 8, Not sure 2

Greece: Very positive 49, Somewhat positive 33, No impact 11, Unemployed 6, Not sure 1

Portugal: Very positive 54, Somewhat positive 33, No impact 8, Unemployed 4, Not sure 1

Romania: Very positive 47, Somewhat positive 36, No impact 10, Somewhat negative 1, Very negative 1, Unemployed 4, Not sure 2
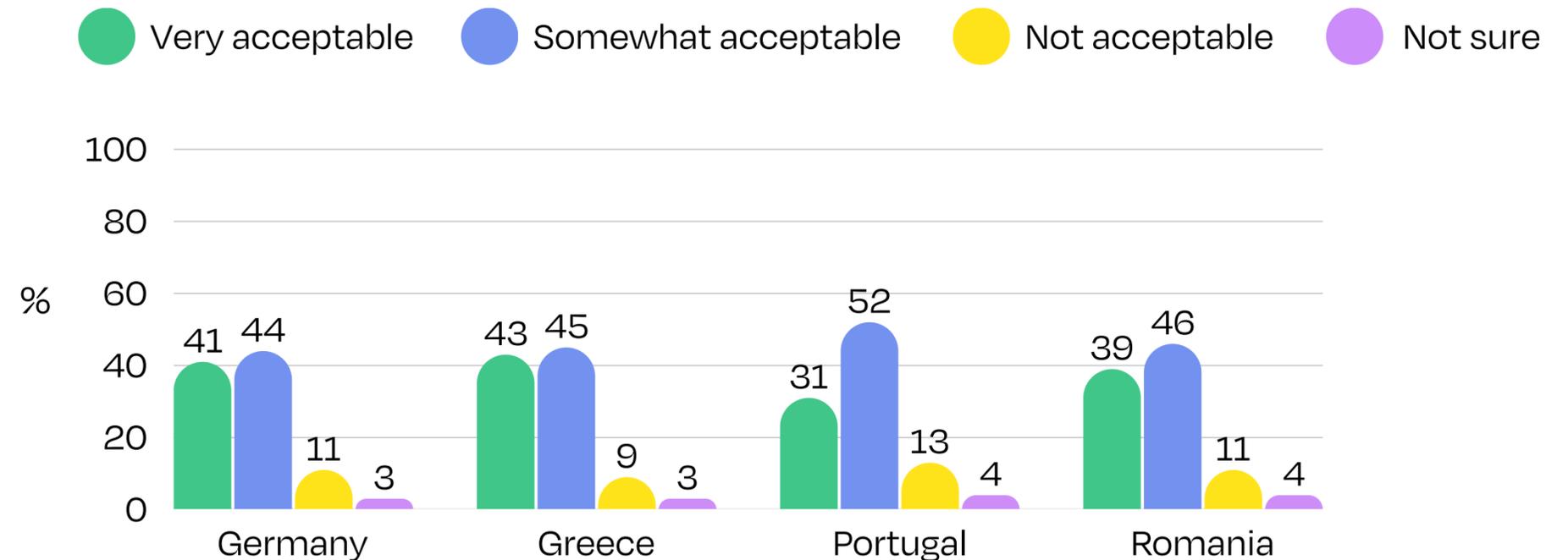
Importance of provider investment in future technologies

There was a **strong consensus that telecoms providers must invest in future technologies** like fibre, 5G/6G and cloud-based networks.

Legend:
● Absolutely essential ● Very important ● Somewhat important
● Not important ● Not sure

Germany: 28, 44, 19, 4, 4
Greece: 47, 37, 13, 2, 2
Portugal: 35, 47, 14, 1, 3
Romania: 42, 38, 17, 2, 1
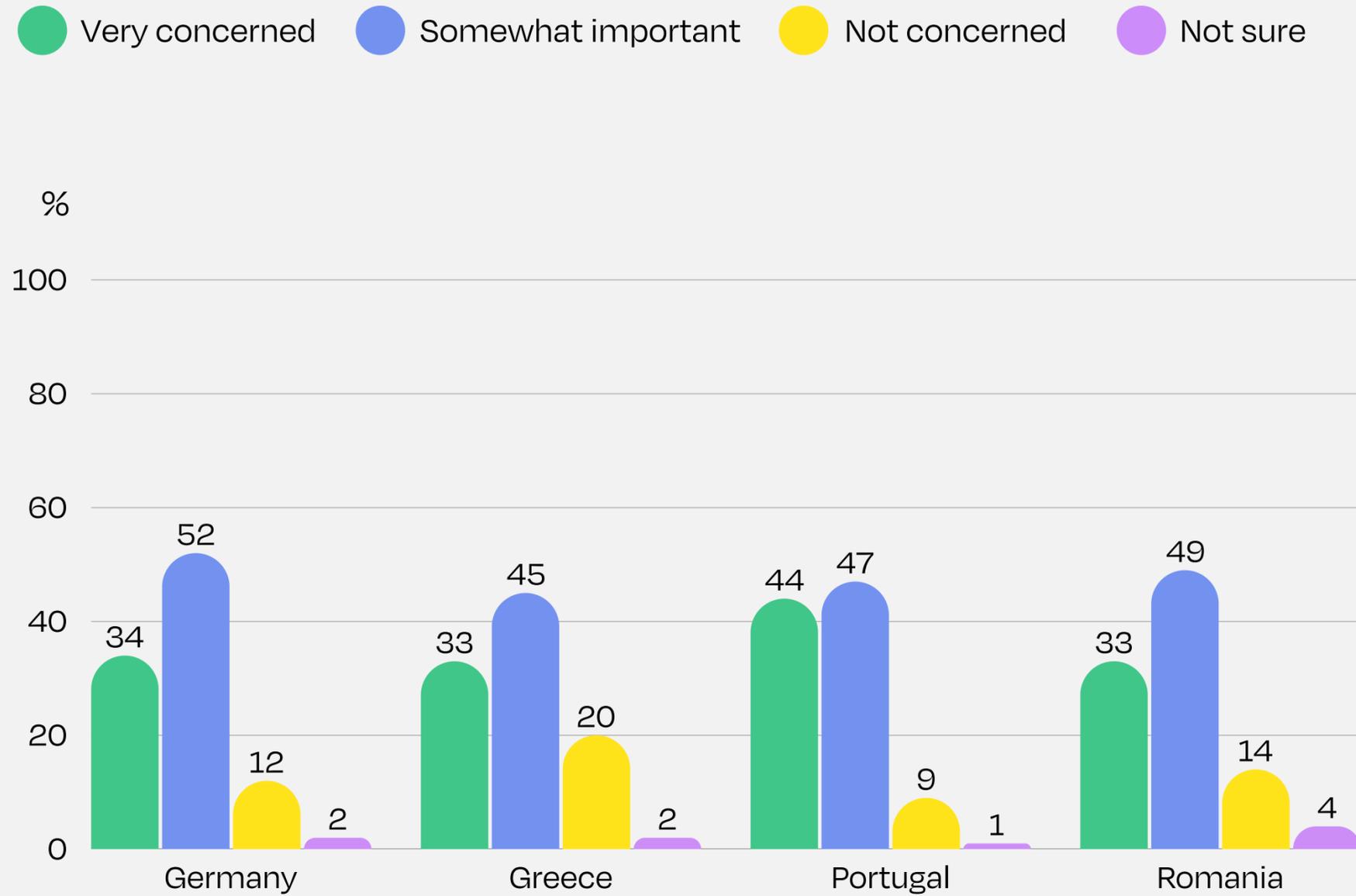
Opinion on using taxpayer money for internet insfrastructure

Taxpayer funding for infrastructure improvements was also widely regarded as acceptable or very acceptable across all countries.

Legend:
● Very acceptable ● Somewhat acceptable ● Not acceptable ● Not sure

Germany: 41, 44, 11, 3
Greece: 43, 45, 9, 3
Portugal: 31, 52, 13, 4
Romania: 39, 46, 11, 4

17

4

(Cyber)security
& sovereignty

Concern about cyberattack risks on Europe's digital networks

🟢 Very concerned   🔵 Somewhat important   🟡 Not concerned   🟣 Not sure

%

Germany: 34, 52, 12, 2
Greece: 33, 45, 20, 2
**Portugal:** 44, 47, 9, 1
Romania: 33, 49, 14, 4

Security, trust and strategic autonomy emerged as central themes in attitudes towards Europe's digital future. Respondents in all four countries **were concerned about cyberattacks on Europe's digital networks**, with particularly intense concern in Portugal.

Security of critical connectivity infrastructure

- 🔵 Somewhat concerned
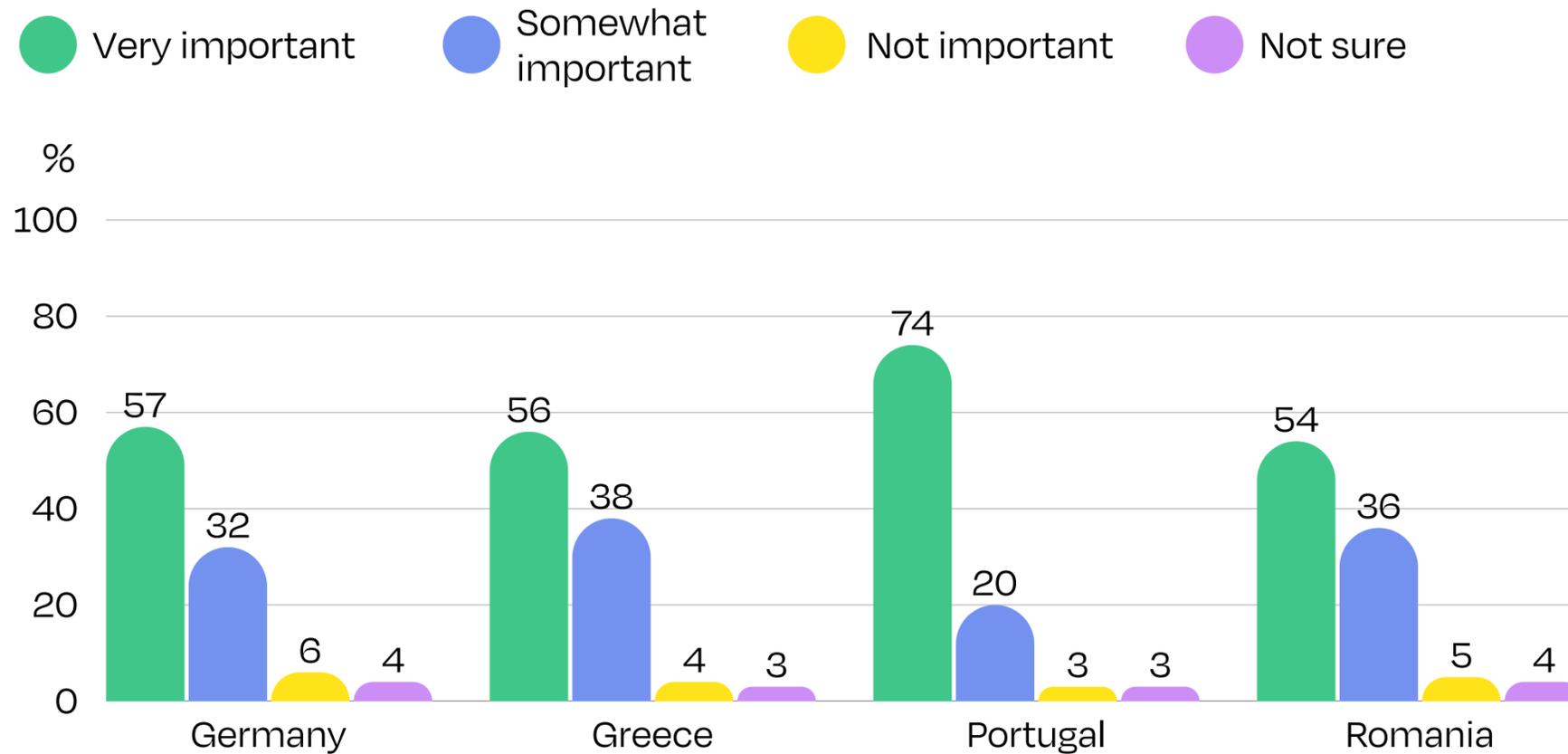- 🟣 Not concerned
- 🟢 Very concerned
- 🟡 Not sure

%
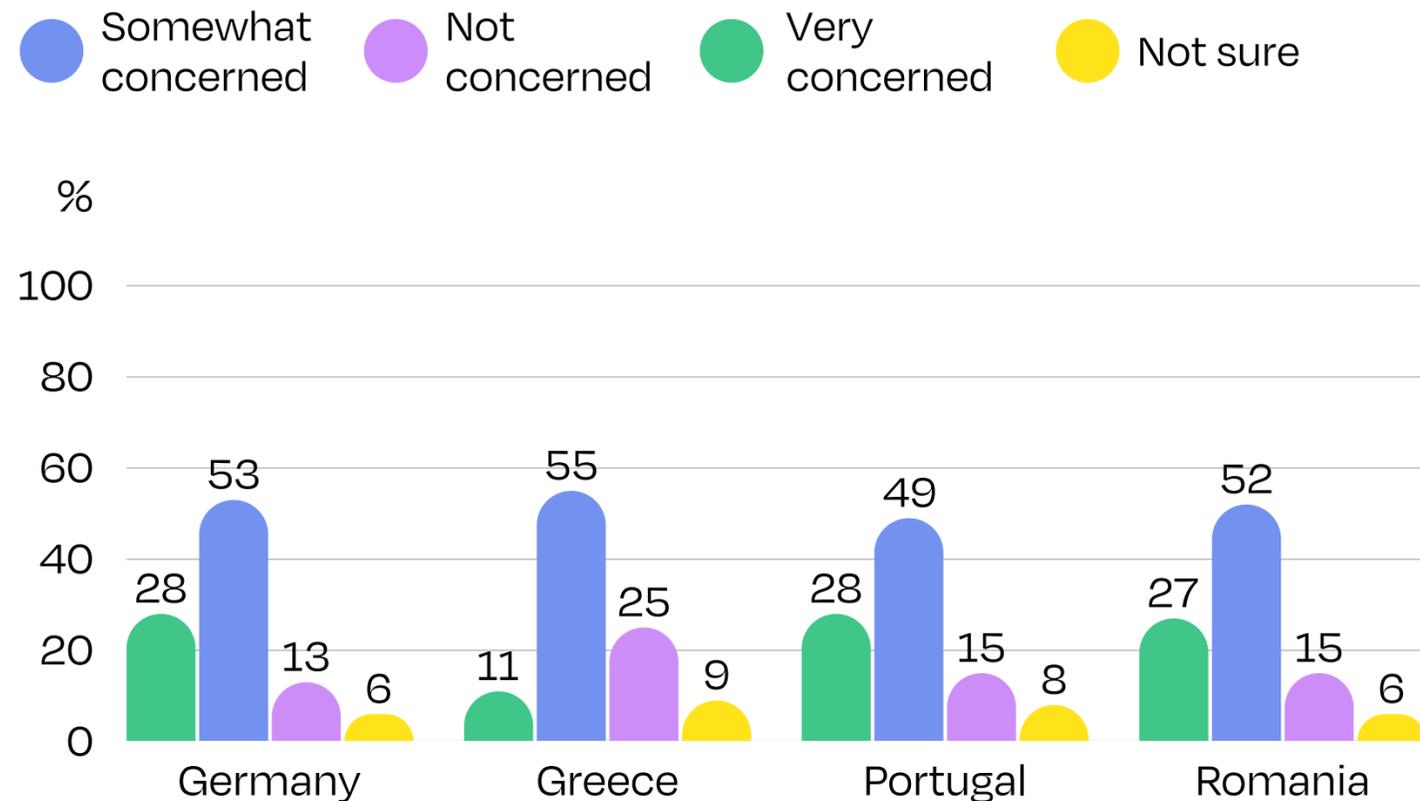
Those concerns were reflected in attitudes to the security of digital assets such as undersea cables, data centres and satellites. Around three-quarters of respondents in Germany, Portugal and Romania were **worried about the resilience of digital infrastructure**.

Awareness of connectivity-dependent technologies

- 🟢 Aware
- 🟣 Not aware
- 🟡 Not sure

%
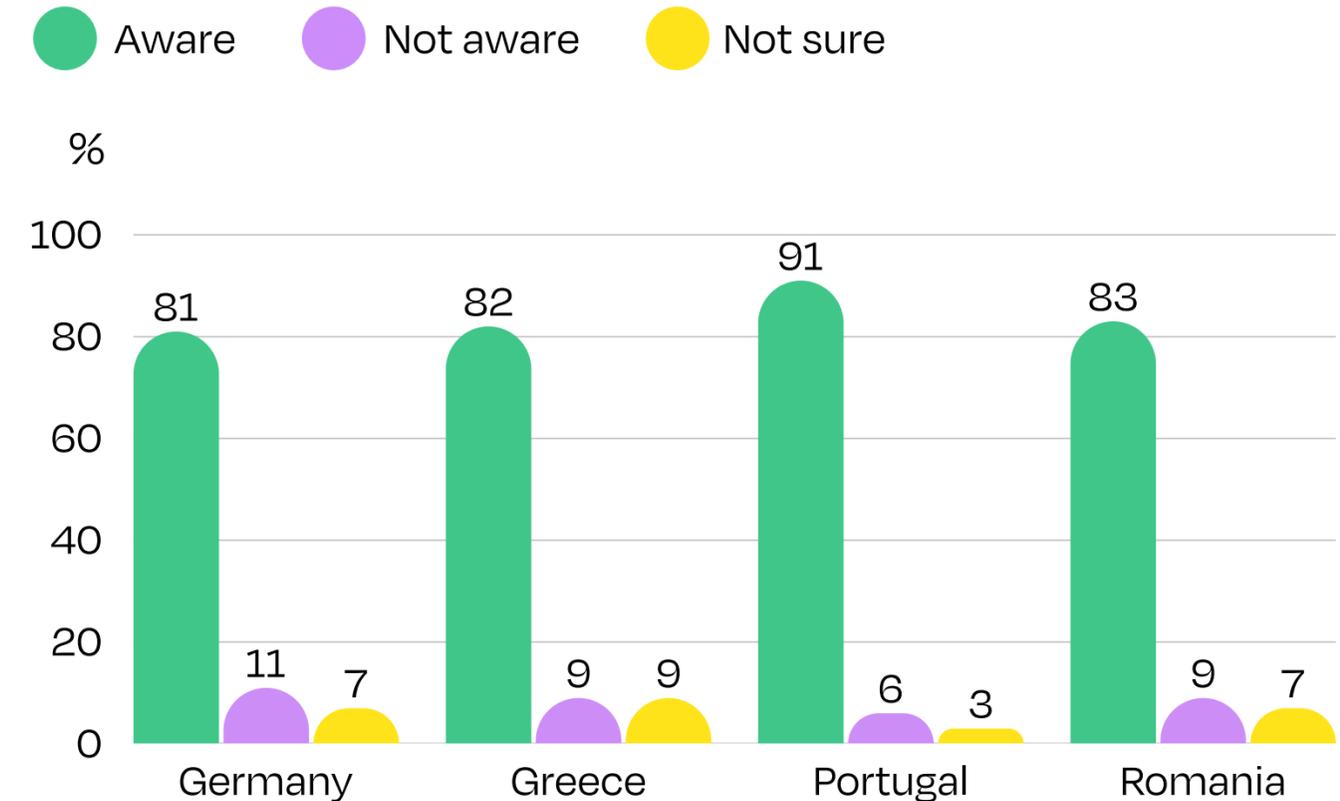
Respondents in all four countries were aware that critical technologies including drones, artificial intelligence, data centres, smart energy grids, navigation systems, defence and emergency communication depend on reliable digital connectivity. They were aware that **secure and reliable networks now play a critical role in national security alongside energy and defence**. This was especially the case in Portugal.

Importance of developing Europe's own digital infrastructure

Legend:
- 🟢 Very important
- 🔵 Somewhat important
- 🟡 Not important
- 🟣 Not sure

%

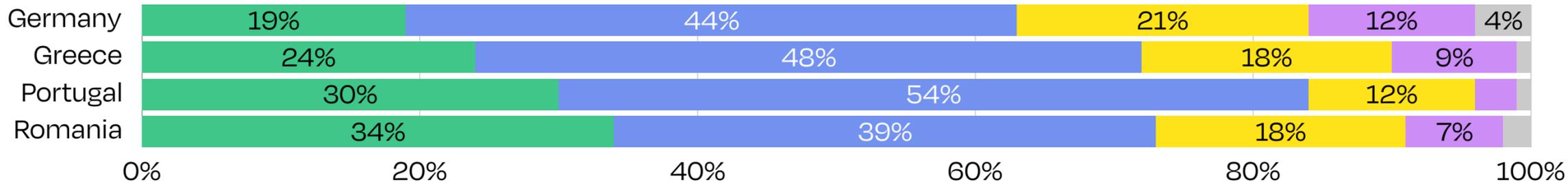|	Germany	Greece	Portugal	Romania
Very important	57	56	74	54
Somewhat important	32	38	20	36
Not important	6	4	3	5
Not sure	4	3	3	4

Across all four countries, **respondents strongly supported the idea that Europe should develop its own digital infrastructure** rather than relying on technologies from other regions. The need for European digital autonomy was **particularly pronounced in Portugal** but also enjoyed broad backing in Germany, Greece and Romania as well.

When it comes to trust in different actors to ensure secure and trustworthy access to digital networks, **the European Union was consistently more trusted than national governments or private operators**. National governments, by contrast, tended to attract the most scepticism, especially in Greece where many said they had low or no trust in their politicians. **Telecom operators enjoyed moderate levels of trust**. Romania gave these private actors higher marks than the other countries. Romania was also the most willing to trust tech companies.
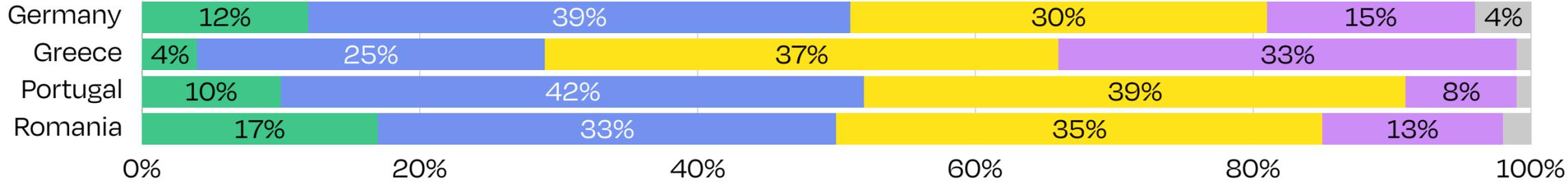
Trust in actors ensuring secure digital network access

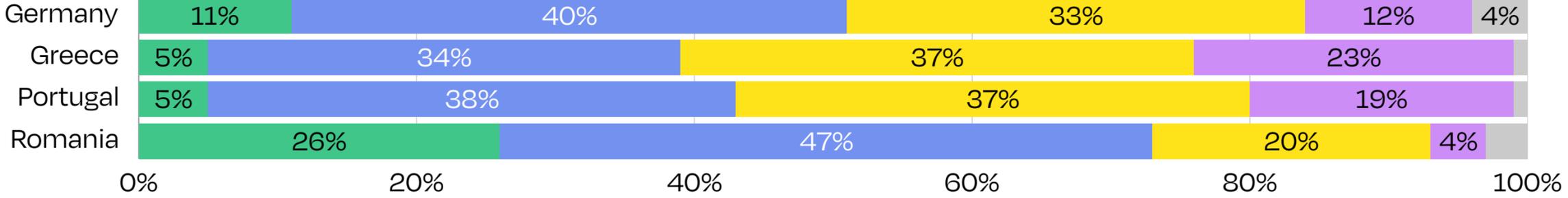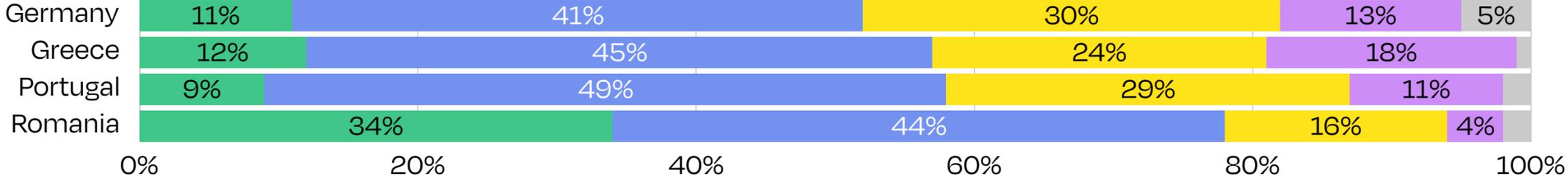● High trust   ● Some trust   ● Low trust   ● No trust   ● I don't know

The EU

Country	High trust	Some trust	Low trust	No trust	I don't know
Germany	19%	44%	21%	12%	4%
Greece	24%	48%	18%	9%	
Portugal	30%	54%	12%		
Romania	34%	39%	18%	7%	

National government

Country	High trust	Some trust	Low trust	No trust	I don't know
Germany	12%	39%	30%	15%	4%
Greece	4%	25%	37%	33%	
Portugal	10%	42%	39%	8%	
Romania	17%	33%	35%	13%	

Telecommunication operators

Country	High trust	Some trust	Low trust	No trust	I don't know
Germany	11%	40%	33%	12%	4%
Greece	5%	34%	37%	23%	
Portugal	5%	38%	37%	19%	
Romania	26%	47%	20%	4%	

Tech companies

Country	High trust	Some trust	Low trust	No trust	I don't know
Germany	11%	41%	30%	13%	5%
Greece	12%	45%	24%	18%	
Portugal	9%	49%	29%	11%	
Romania	34%	44%	16%	4%	

22

Conclusions

The survey showed how **digital connectivity was viewed as integral to contemporary social, and economic life across the four countries**. While experiences of service quality, provider availability and the perceived benefits of emerging technologies vary, **citizens consistently viewed reliable, high-speed connectivity as essential** for their daily activities, employment prospects and national economic performance.

A clear preference emerged for continued investment in advanced digital infrastructure - whether through public funding, private-sector innovation or EU-level stewardship. There was particularly strong support for Europe to develop greater autonomy in its digital capabilities.

At the same time, the survey highlighted how **concerned people are over cybersecurity, the resilience of critical infrastructure and disparities in access**, especially between rural and urban areas. The European Union was perceived as more credible than national governments or private operators in safeguarding secure and trustworthy networks.

Overall, the survey suggested **countries should strengthen and modernise their digital ecosystems**, not only to enhance competitiveness and inclusion but also to ensure security, resilience and strategic independence in an increasingly interconnected world.

Country annexes

Germany

Internet connectivity is deeply embedded in everyday life for most Germans. Over 80% of survey participants said being online was very important or essential for communicating with family and friends (86%) and managing their finances (81%). Large majorities also considered internet access important for work or education (76%) and for organising travel (72%). Overall satisfaction was high, with three-quarters of respondents (76%) rating their internet connectivity as good or excellent, while only 7% reported a poor connection. Just over half (51%) felt the market offered sufficient choice of home internet providers.

Almost a half of German participants named digital banking and financial services as the most important service for them (44% ranking it number one), followed by shopping for essentials online (32%), accessing government services (25%), education and e-learning (19%). Despite the push towards online education and healthcare during the Covid pandemic, these offerings were not as popular in Germany. Less than one-fifth (19%) of people surveyed in Germany said they relied on mobile data as their main connection, while more than three-quarters said they primarily relied on fixed-line connections (76%).

Although German respondents were positive about the state of their connectivity, almost two-thirds (60%) said their daily activities could still disrupted by reliability

issues. Similar numbers (58%) **said connectivity in rural areas was not as strong as in cities.**

Most Germans surveyed were unfazed by using public money to improve infrastructure. Only 11% said they would object. More than one-third (35%) believed better connectivity would strengthen both the German and European economies. The respondents said the sectors that would benefit most from connectivity were remote working (53%), digital services for business (48%) and connecting rural areas (43%). Yet roughly **three in five said their connectivity needs were not reflected in government decisions**.

People surveyed in Germany indicated that they were **worried** (86%) **about cyberattacks** and were aware (81%) that **connectivity was vital to satellite systems, energy grids and other critical services**. Most respondents (89%) said **Europe should be developing its own digital infrastructure**, independent of other powerful blocs like the United States and China. When asked who they would **trust to ensure safe and reliable access to digital networks**, they placed their faith in the **European Union (63%) above other entities**. Just over half of participants said they would trust the German government (51%), tech companies (52%) and telecom operators (51%).

Greece

Greeks told our survey in overwhelming numbers that **internet connectivity was central to their daily lives**. 88% said being online was very important or essential for their work and education, managing their finances and using public services. Communicating with family and friends (86%) and accessing healthcare (82%) were not far behind. Three in five told our survey that **their internet services were broadly good or excellent**, indicating the consumers surveyed were happy. Very few (9.5%) felt they had a poor connection. More than a half felt the market gave them enough choice of home internet providers (54%).

More than one-third of Greeks felt the most valuable digital service was digital banking and financial services (41% ranking it first), followed by education and e-learning (19%), accessing government services (15%), and shopping for essentials online (13%). While they find accessing medical information or online consultations with their doctor valuable, this aspect has not been as popular, potentially due to the nature of the profession and the recency of availability of such services. Less than one-fifth (15%) of people surveyed in Greece said they relied on mobile data as their main connection, while more than three-quarters said they primarily relied on fixed-line connections (79%).

Although they were positive about the state of their connectivity, roughly three-quarters (72%) said their daily activities were still disrupted by reliability issues.

Around **50% said connectivity in rural areas was not as strong as in cities**, with only 10% saying it was.

Most people surveyed said they were not confident in the reliability of their services. Some 84% firmly believed telecom providers should be investing in future technologies. They were also overwhelmingly **positive about public money being spent on upgrading infrastructure**, with 88% agreeing and just 9 % saying they would object. The respondents said the sectors that would benefit most from connectivity were remote working (74%), digital services for business (51%) and connecting rural areas (45%). Yet roughly **70% said the government decisions did not reflect their connectivity needs**.

Greeks told our survey they were **worried about cyberattacks (78%) and were aware that connectivity was vital to satellite systems, energy grids and other critical services (82%)**. Almost all respondents (94%) said **Europe should be developing its own digital infrastructure**, independent of other powerful blocs like the United States and China. When asked who they would trust to ensure safe and reliable access to digital networks, the **European Union (72%) was the resounding top answer**, with tech companies (57%), telecom operators (39%) next, and the Greek government (29%) trailing the pack.

Portugal

An overwhelming majority of Portuguese participants told our survey that **internet connectivity was central to their daily lives**. 93% said being online was very important or essential for their work and education. Only slightly less important were communicating with family and friends (87%), managing finances (86%) and organising travel (84%). Portuguese consumers surveyed were happy overall. Around 90% said their internet connectivity was broadly good or excellent, with just 2% rating their connection as poor. More than three-quarters felt the market gave them enough choice of home internet providers (76%).

Half of Portuguese respondents felt digital banking and financial services were the most valuable digital services to them (50% ranking it at number one), followed by accessing government services (16%), and education and e-learning (14%). While they find shopping for essentials online, accessing medical information or online consultations with their doctor valuable, this aspect has not been as popular, potentially due to the nature of the profession and the recency of availability of such services. Just over one fifth (21%) of people surveyed in Portugal said they relied on mobile data as their main connection, while more than three-quarters said they primarily relied on fixed-line connections (79%).

Portuguese respondents were positive about the state of their connectivity, less than half (46%) saying their daily activities were disrupted by reliability issues. However, roughly **three-quarters said connectivity in rural areas was not as strong as in cities**, with only 3% saying it was.

Almost all Portuguese (98%) told our survey internet connectivity was vital to the success of small businesses, more so than transport links (88%), location (87%) or tax relief (83%). They believed telecom providers should be investing in future technologies (82%). They were also **overwhelmingly positive about public money being spent on upgrading infrastructure**, with 83% agreeing and just 13% saying they would object. The respondents said the sectors that would benefit most from connectivity were remote working (73%) and connecting rural areas (53%). Improving Portugal's connectivity would positively impact people's jobs, according to 87% of respondents, with no one saying it would have a negative impact. Yet roughly **three-in-five (57%) said government decisions were not taking their connectivity needs into consideration**.

Most Portuguese participants (91%) said they were **worried about cyberattacks in Europe and were aware that connectivity was vital to satellite systems, energy grids and other critical services**. Similar numbers (94%) felt **Europe should be developing its own digital infrastructure**, independent of other powerful blocs like the United States and China. When asked who they would trust to ensure safe and reliable access to digital networks, the **European Union (83%) came out top**, with the Portuguese government (52%) ahead of tech companies (58%) and telecom operators (43%). .

Romania

A large proportion of Romanians surveyed said internet **connectivity was central to their daily lives**. 81% said being online was very important or essential for communicating with family and friends. Managing finances (79%) and using the internet for work and education (80%) also scored highly. Romanian participants were overall happy, with around 90% ranking their connectivity as good or excellent, and just 3% saying they had a poor connection. More than two-thirds felt the market gave them enough choice of home internet provider (71%).

Romanians felt online healthcare was the most valuable digital service to them (30% ranking it as number one) just above digital banking and financial services (28%) followed by online education and e-learning (14%), shopping (11%) and accessing government services (7%). These latter two aspects have not been as popular, potentially due to the recency of availability of such services or supporting infrastructure. Although many countries pushed online education and healthcare during the pandemic, the evidence suggests these offerings are not widely available in Romania. More than one-third (36%) of people surveyed in Romania said they relied on mobile data as their main connection, while just less than half said they primarily relied on fixed-line connections (48%). Two-thirds (66%) said their daily activities were disrupted because of slow or unreliable connections. However, the perception of a rural-urban divide was not pronounced, with only 23% believing people in cities enjoyed better connectivity, against 41% who felt they did not.

People surveyed in Romania felt that internet connectivity was vital to the success of small businesses (87%), more so than transport links (84%), location (82%) or tax relief (85%). They believed telecom providers should be investing in future technologies (80%). They were also overwhelmingly **positive about spending public money on infrastructure upgrades**, with 85% agreeing and just 11% saying they would object. The respondents said the sectors that would benefit most from connectivity were remote working (55%), digital services for businesses (51%) and access to online education (46%). Improving Romania's connectivity would positively impact people's jobs, according to 83% of respondents, with just 2% saying it would have a negative impact. Romanian participants were confident that **government decisions were taking into consideration their connectivity needs**, with 52% saying they felt it was the case.

More than 80% of Romanians surveyed said they were **worried about cyberattacks in Europe, with similar numbers (83%) aware that connectivity was vital to satellite systems, energy grids and other critical services**. Roughly 90% felt **Europe should be developing its own digital infrastructure**, independent of other powerful blocs like the United States and China. When asked who they would trust to ensure safe and reliable access to digital networks, similar numbers picked tech companies (78%), telecom operators (74%) and the European Union (73%), well ahead of the Romanian government (51%).

Public views on connectivity in Europe

Contact us with your questions and comments.

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