



# The European Patchwork

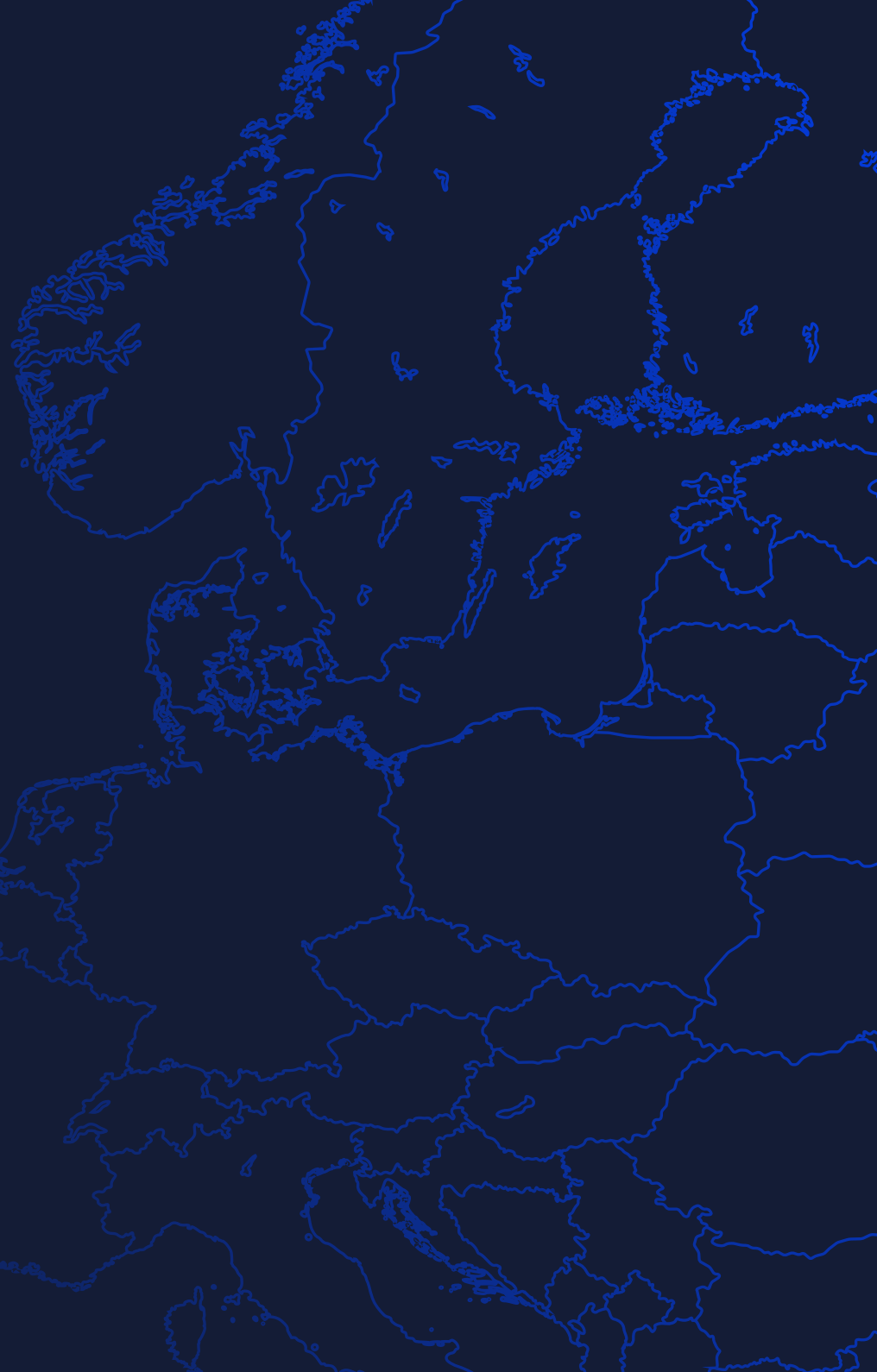
The key to seamless internet access in Europe

**GNX**

Country Guide | 2025

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Europe as a whole:

# Framework in theory, patchwork in practice



**From the Treaty of Rome in 1957 to 1985's Schengen and 1992's Maastricht, EU law has guided the area into a single market – but the process is ongoing, and it doesn't mean what most people think it does. The fundamental thought: EU-wide laws are not a single set of regulations, but Directives for states to translate into national law. And the impact on connectivity options is large.**

Since Europe contains many legal traditions and languages, interpretation of these Directives differs across borders. Some States require business residency in that country, even for a small local presence; others limit the ability to deal with top-tier national telcos, creating layers of administrative hassles. And everywhere, the technologies available have been shaped by local preferences: some areas without wired infrastructure enjoy best-in-class LTE, and some top-tier cities lack fiber to the curb in many neighborhoods.

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Across the region, markets are dominated by national champions and State enterprises. You'll see the same names everywhere you go in

Germany, or Italy, or Spain – but only within those countries; there are fewer international players than you might expect in such an integrated area.

The bright side: governments are unanimous on the need for high-capacity internet, and in Western Europe, at least, bandwidth is among the fastest in the world. Of course, the EU also enjoys dense subsea infrastructure, cables reaching east and south into MENA and across the Atlantic to North America.

All in all, there's some deal of complexity. Those who can navigate it will find numerous options for profitable progress, and we have the key questions to answer – and our approach to solving them.

# The State of play across Europe

**The EU is 27 nations, but the non-EU spans around 20 more – including, today, ex-EU member of the United Kingdom. While Brexit hasn't created major difficulties for those seeking connectivity – the UK, after all, remains a major hub for subsea cabling – it hasn't reduced red tape, either. In the EU and beyond, these are the problems that loom largest.**

## Challenge 1:

### A prevalence of national champions – everywhere

Limit your search to Europe's major cities, and you'll see plenty of choices. Mobile is largely deregulated, letting big names like Vodafone expand regionwide. Fiber rolls out fast thanks to connected national players. Point-to-Point wireless is widespread for backhauling data between cell towers and office parks, particularly in Eastern Europe. And with a push towards replacing legacy copper infrastructure, straightforward capacity is rarely a problem.

It's a different picture outside the big cities. In the past, legal frameworks compelled State-run telcos to offer "connectivity" (at the time meaning POTS, Plain Old Telephone Service) to the most remote village, however uncompetitive the business case. In later decades, that's led to effective monopolies over infrastructure, since the telcos own countless rights-of-passage across land and alongside roads for newer cabling. Even though many of these companies are no longer owned by the State, they remain large in influence.

This means that outside urban areas in Germany, the ultimate carrier of your data will invariably be Deutsche Telekom. Or Telefónica on the Iberian Peninsula. And in Italy: Telecom Italia. Often – and doubly so for wired networks – they'll be the only choices immediately available. (For those with large electricity needs, perhaps planning a new data center: there's a similar market bottleneck in energy.)

**So, beware of thinking  
two different ISPs will fulfill  
your diversity requirement:  
it's likely a single cable  
cut will affect both equally.**



## Challenge 2:

### Multiple layers of administration to negotiate

The more developed an economy, the bigger the role of the State. So in places like the EU there are considerable stacks of paperwork to complete when you're moving into the market. But even within the European Union – supposedly a single market for goods, services, capital, and people – the “right” way to deal with State players varies. And not just across borders, but in different ways within the same member State.

It's not just due to how Directives from Brussels are laid down in national law – there are also nuances in how those laws are interpreted from company to company. To take some examples: in France, one major mobile provider states a foreign company cannot buy services from it directly, but must go through an aggregator or an MSP. But in Italy, one major telco will happily deal direct – while another will not, stating the need for an Italian base of operations. Across the EU, it's common for non-native companies to be refused service from national telcos directly, even if they have a base elsewhere in the EU.

Italy is perhaps the most common case for this – but France and Germany follow a similar script.

**In other words, while legislation matters, local practices matter too. So make sure you choose a partner who knows the local landscape.**

These complexities, plus the need for local consultations at multiple levels of government, can mean long lead times per project. For approving new installations in Germany, 16 weeks is a minimum, with 24 often the case. Similar situations exist in France, Italy, and Spain. And to the east, the piles of paper can be even higher.

So never underestimate the extent to which local sentiment can hamper your connectivity ambitions. But there'll be options in the mix – somewhere. All the more reason to seek a creative solution.

### Challenge 3:



## Small cultural nuances making big differences

One pundit described the UK and USA as “two countries divided by a common language”. The divisions can multiply when you look at mainland Europe. 24 languages are recognized as major, each spoken by millions. But there are another 200 minor tongues with strong localized influence, many protected by law. Catalan, Breton, Sami, and Sorbian are all supported by legal frameworks, meaning some paperwork may need completing in a language you’ve never heard of.

These languages give Europe its rich culture and history, but they also reflect strong local preferences that newcomers should respect. Which ISP would a company in the Basque region prefer to deal with: a distant national telco elsewhere in France or Spain, or a region-specific provider speaking the local language?

And it goes beyond language. Europe is a patchwork of different business practices, trusted ways of working, established approaches to solving problems. Accepting this means faster approvals and closer relationships: growing companies may think global, but successful ones also think local.

This is why it makes sense to engage with the right mix of local and national providers, each bringing benefits to your connectivity picture.

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## Challenge 4:

### Uneven coverage where it's most needed

Industrialized Europe is dotted with large sites where thousands of people work: out-of-town factories, sprawling production plants, large warehousing complexes positioned for access to roads and rail. But a surprising volume of Europe's broadband infrastructure is focused on domestic and residential needs. Which means you'll get terrific bandwidth in a town or city... but may be disappointed out in the countryside.

While there'll always be ISPs available, they may all rely on the same cable, limiting diversity options again. Mitigating this risk means engaging with more than one regional ISP (or using a separate technology), making sure that what looks diverse on the surface really uses different infrastructure under the skin.

**There's a silver lining: the choice of ISPs gives you plenty of opportunities to find an optimal outcome. And this doesn't necessarily mean engaging with a long list of local companies**

There's a silver lining: the choice of ISPs gives you plenty of opportunities to find an optimal outcome. And this doesn't necessarily mean engaging with a long list of local companies. ISP Aggregators can combine the services of various providers into a single contract for you, meaning your connectivity can be spread across national telcos, mobile networks, and local ISPs in the ideal configuration to give you smooth and continuous coverage across all your sites.

### And a note on Brexit

While results since Brexit have been mixed, Brexit itself hasn't been a big issue for companies looking for connectivity in Britain. As Britain has adapted to being outside the EU, many of its laws remain in compliance with EU Directives, known as "equivalence". And this is likely to continue, now the risks of distancing itself from its neighbors seem clear.

So good news for those expanding into the UK: Brexit might have created frictions, but your bandwidth probably won't be one of them.

These are the issues. Let's look next at how GNX solves them.

# The GNX solution for connectivity across Europe

That's Europe: from the frozen cold of the arctic North to the endless warmth of its southern beaches, a melting-pot of cultural behaviors and practices affect your connectivity options. But this is where GNX shines. Because it's our business. And whatever challenge matters most to you, we have a way to solve it.

## Creative thinking that solves your problems

In complexity lies opportunity. Cultural diversity and complex legislation also mean there are many different ways to approach the same problem – if you know the right people to help. With thousands of kilometers of fiber-optic infrastructure and the Cloudwards<sup>1</sup> initiative mandating ambitious targets for more, plus huge investments in wireless networks, there's every chance GNX can ensure your bandwidth across Europe meets your business objectives – with business-grade SLAs, too.

Perhaps LEO-based network setup could leapfrog a long lead time your company can't afford. Or uncontended DIA offers gold-standard bandwidth guarantees for a new venture. Let us show you.



## Regional relationships that smooth your rollouts

Even with 27 nations in the EU and 20+ allies in the region, connectivity across Europe still isn't a smooth playing field – meaning a lot of paperwork as you contract state-by-state. But what if you could replace those never-ending decisions with a single contract that covers the entire region – and the world beyond it, too? And once deployed, one single point of contact for support?

That's what GNX brings to the party, thanks to working relationships with thousands of Internet Service Providers and experts worldwide. By working with GNX, you may reduce that paperwork to one contract, one invoice, and one point of contact. And we're 100% carrier-neutral and solution-agnostic: we don't play favorites or push one technology over another. It's about giving you what you need.

## Local knowledge that unlocks hidden advantages

The ideal solution isn't always obvious. Which is why GNX takes advantage of local ISPs and expertise to find the solutions that make most sense in each location. One size does not fit all. So we create ours district by district, city by city, and across borders, using what works best for each situation and use case, each piece shaped to fit.

Imagine local knowledge that can find 60% savings on a "fixed" price. Services that can connect long sections of infrastructure on short timescales. And SLAs that give above-average performance on shared infrastructure. All available when you see both the Big Picture and the detail within it, ready to be optimized at every node.

This is GNX and we'd like to work with you across Europe ... and beyond. Contact us today.



# The connected way



## Global internet access

Our core offer is internet connectivity. Working with thousands of ISPs, MSPs, and telcos worldwide – wired and wireless – GNX brings you business broadband, Dedicated Internet Access, and mobile internet in 190+ countries, all under a single contract. Turning complexity into simplicity.



## Point-to-point

Wherever you go, network coverage has gaps – and Point-to-Point is how you join them up. From private ethernet in the ground to microwave connections in the air, a dedicated link between two sites often offers great bandwidth and the best possible SLA at a competitive cost. That's why we do it at GNX.



## Cloud fabric

It's not just how you connect; it's what you connect. Services like SD-WAN and cloud applications keep your business data secure and smooth – completing your connectivity landscape. Private to public to hybrid, GNX can help put the Big Picture together.



## How GNX+ brings it together

The cherry on top is GNX+, our automated and carrier-neutral platform that lets you compare different connectivity services from thousands of providers. Much like browsing different travel deals when planning a trip, we'll show you all the options and information available – technologies, speeds, prices, and more.

And at all times, GNX+ gives you a clear view of your entire network setup, with management, monitoring, and support functions at your fingertips, making the complex world of connectivity as it should be: straightforward and simple.

# Get in touch

Based in Amsterdam, GNX is a carrier-neutral, solution-agnostic connectivity provider with established relationships with over 1,500 ISPs worldwide. We offer creative solutions to business broadband in all the world's regions, making use of both global perspective and local expertise. Make this the year you join our growing roster of over 200 enterprise customers.

Learn more about us at [gnx.net](https://gnx.net) or contact us at [contact@gnx.net](mailto:contact@gnx.net)

**GNX. Straightforward Connectivity.**

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[gnx.net/contact](https://gnx.net/contact)

The GNX logo is displayed in a bold, yellow, sans-serif font. The letters are thick and blocky, with a slight shadow effect. The 'G' and 'N' are connected at the top, and the 'X' is formed by two intersecting lines. The logo is positioned in the bottom right corner of the page.