

Public debriefing

9 December 2025

Outcomes of the 65th BEREC ordinary plenary meetings
4-5 December 2025

Programme

- BEREC Work Programme 2026
- BEREC Strategy 2026-2030

Q&A session

- Draft BEREC Report on switching and termination of contracts
- Draft BEREC Guidelines on Geographical surveys of network deployments
- BEREC updates

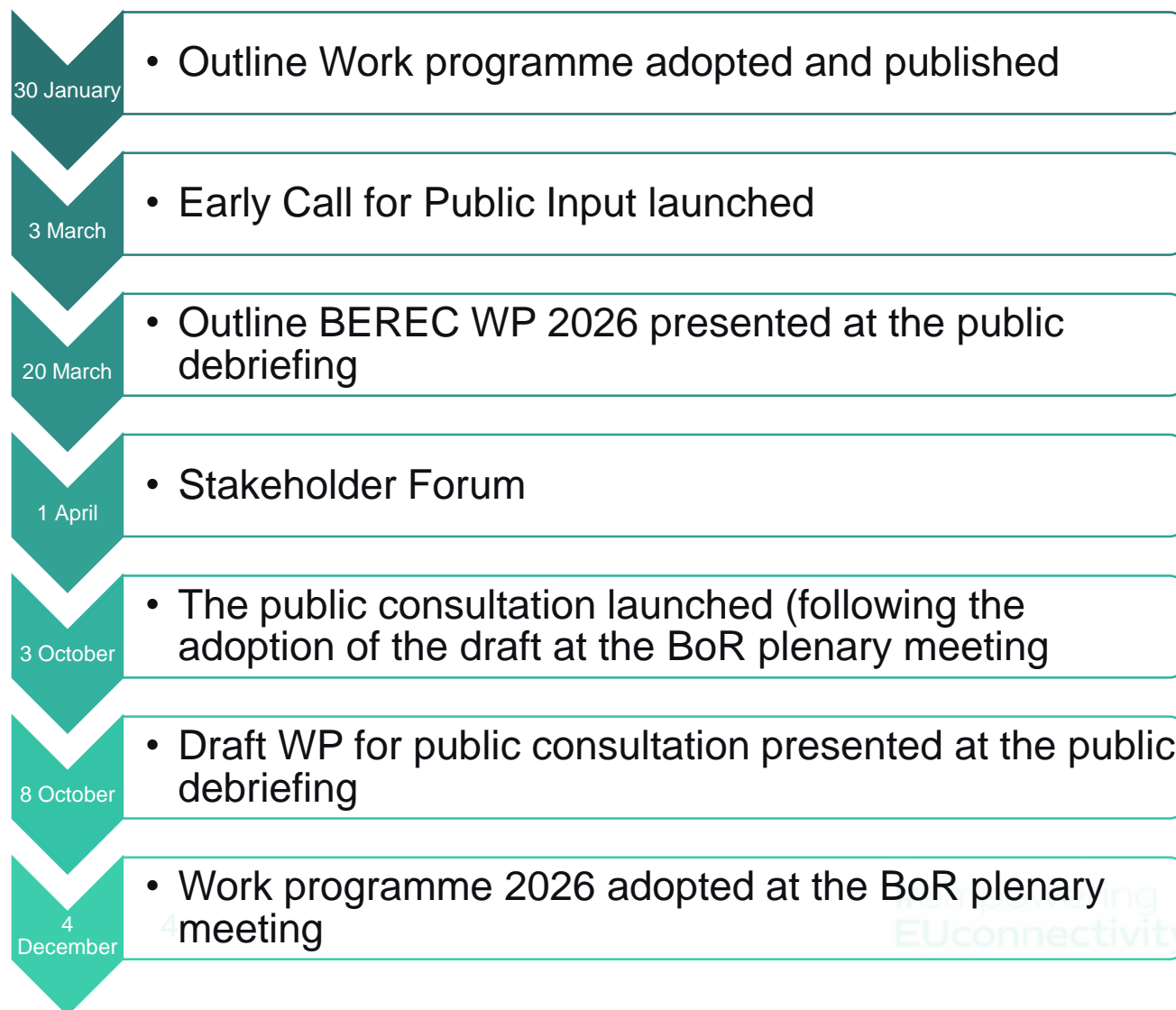
Q&A session

BEREC Work Programme 2026

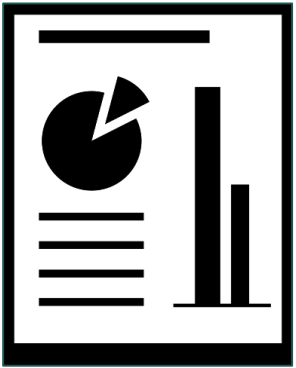
Incoming BEREC Chair
Marko Mišmaš (AKOS)

Work Programme status

- Final number of projects on the list: **40**
 - **8** Carry-overs from 2025
 - **11** Mandatory/recurring
 - **5** (4+1) DNA and the regulatory framework review related projects
 - **16** new projects

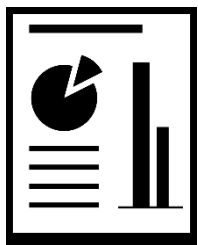


Expected workload (P1)



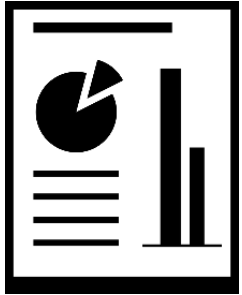
Reports, guidelines	Public Consultations	Summaries	Workshops	Other
32nd IR Report	Fact-finding Report on competition indicators and regulatory highlights in different jurisdictions	BEREC-BEUC Joint workshop on end-user rights (summary)		Outline WP (e-clearance)
	Report on Virtual Worlds and Web 4.0			
	BEREC Retail & Wholesale Roaming Guidelines			

Expected workload (P2)



Reports, guidelines	Public Consultations	Summaries	Workshops	Other
Report on switching and termination of contracts	Further Guidance on 5G Network Slicing	Switching and termination of contracts (consultation report)	External workshop on migration and copper switch-off in light of the DNA	CFI on interfaces to mobile networks for dev... (external CFI)
WACC parameters' calculation according to the EC Notice		Guidelines on Geographical surveys of network deployments (consultation report)	Workshop and Report on practices for ensuring equivalence of access and choice with respect to accessibility	
Update to BEREC Guidelines on Geographical surveys of network deployments		Workshop on migration and copper switch-off in light of the DNA (summary)	Combatting fraud	
BEREC Retail & Wholesale Roaming Guidelines				

Expected workload (P3)



Reports, guidelines	Public Consultations	Summaries	Workshops	Other
Fact-finding Report on competition indicators and regulatory highlights...	Work Programme 2027	Workshop on practices for ensuring equivalence of access...(summary)	Workshop on implementation of EoI by NRAs	
Report on Virtual Worlds and Web 4.0	Report on access conditions to state-aid funded networks	Fact-finding Report on competition indicators and regulatory highlights...(consultation report)	Understanding digital sufficiency in digital technologies for greener networks and ICTs	
7th Intra-EU communications Benchmark Report	Report on the competition dynamics of artificial intelligence and...	Report on Virtual Worlds and Web 4.0 (consultation report)		
Implementation of the OIR and the BEREC OI Guidelines				

Expected workload (P4)



Reports, guidelines	Public Consultations	Summaries	Workshops	Other
BEREC Report on access conditions to state-aid...	Report on practices for ensuring equivalence...	Workshop on impl. of EoI (summary)		Work Programme 2027
Report on RA in practice	Report on the application of fair and reasonable pricing...	Understanding digital sufficiency in digital techn....(summary)		Advancing towards environmental data collection... (questionnaire)
Further Guidance on 5G Network Slicing	Sustainable AI for greener digital infrastructures...	Combatting fraud (summary)		
	Reinforcing EU's Resilience Capabilities	CFI on interfaces to mobile netw. for dev. (summary)		
		Access conditions to state-aid funded...(consultation report)		
		Further Guidance on 5G Network Slicing (consultation report)		

Expected workload (throughout 2026)

EWG	Title	2026
WNE	Ad hoc work to support information exchange on 5G private networks, direct-to-device satellite communication, phase-out of 2G and 3G mobile technologies, and hybrid networks	Various
OI	Collaboration on Internet access service measurement tools	None
RAMM	Article 32/33 Phase II process	None
WNE	Peer review process and engaging with RSPG	None
RF	Ad hoc input to the EU/NRAs	Inputs
EU	Ad hoc work on reinforcing end-user rights and empowerment	Inputs
MEA	Ad hoc work (Regulatory framework review) MEA input	Inputs
PFT	Ad hoc work (Regulatory framework review) PFT input	Inputs
WNE	Work on future spectrum market shaping strategic issues	Inputs
RF	BEREC inputs to the regulatory framework review and the DNA	Input
DM	BEREC contribution to the implementation of the Digital Markets Act	Contribution to the impl. of the DMA
DM	BEREC contribution to the implementation of the Data Act	Contribution to the impl. of the Data Act
CSR	Ad hoc work to support reinforcing EU's cybersecurity capabilities	Contribution
FNE	BEREC contribution to European Commission Guidelines on Access to existing physical infrastructure according to Art. 3 (13) of the Gigabit Infrastructure Act	TBD
MEA	BEREC Opinion on the Recommendation on relevant markets susceptible to ex ante regulation	Opinion, External workshop (timing not defined)

Public consultation procedure

- Public consultation from 3 October to 3 November 2025
- Submissions received from **16 stakeholders**:

EENA, ecta, Samsung Electronics, Multi-company response (Amazon, Apple, Broadcom, Cisco systems, Extreme Networks, HP, Intel and Meta), Apple, Vantage Towers, EWIA, Vodafone, Connect Europe, BREKO, MVNO Europe, FTTH Council Europe, Twilio, GSMA, DSA and BEUC

PC response – general comments

- Several stakeholders welcomed the opportunity to respond to the consultation and expressed broad support for the draft WP2026 and BEREC's strategic focus.
- Many also backed BEREC's role in the upcoming review of the EU telecom regulatory framework.
- Many stakeholders supported the organisation of upcoming workshops and expressed readiness to contribute.
- Stakeholders have provided many specific comments, focusing both on individual projects and on the strategic priorities.

Updates since the draft for public consultation

- 3 PRDs added:
 - PRD 1.12. „Update to BEREC Guidelines on Geographical surveys of network deployments“ **added on the list** - due to change in the timeline
 - PRD 2.5. „BEREC external workshop on implementation of Equivalence of Inputs (EoI) by NRAs“ also **postponed from 2025**
 - PRD 6.3.1. “Ad hoc input to the EU/NRAs“ which is mandatory and was included in the draft WP **also included on the list of PRDs**
- Timelines and descriptions updated: 1.1, 1.5, 2.4, 3.3, 4.4, 4.5., 4.6, 6.3.3, 8.4
- Deliverables update:
 - 1.4. BEREC Opinion on the Recommendation on relevant markets susceptible to ex ante regulation (**a deliverable is added: additional external workshop**)
 - 1.7. BEREC Report on access conditions to state-aid funded networks (**a suggestion to include a report on the public consultation was taken on board, which also led to changes in the proposed timeline**)

BEREC Strategies

Planning and Future Trends Working Group
Maria Ruiz Merida (CNMC), Katia Marcantonio (AGCOM)



Outcome of the public consultation

Strategy public consultation outcome

- **TIMELINE:** 11 JUNE – 15 JULY 2025
- **13 RESPONDENTS** - A1; Euralarm; ECTA; COLT; CONNECT EUROPE; EENA; 4iG; FTTH; MVNO Europe; Verisure; Transaltel; Sateliot; EU citizen

Breakdown of respondents by category:

- Electronic communications operators
 - Industry associations
 - Emergency and public interest organisations
 - Security and smart home solutions providers
 - Individual contributor
-
- **RESPONSES OUTLOOK**
 - Supportive of BEREC draft STRATEGY 2026-2030
 - Specific input: NTN growing role and MVNO role in IoT

The public consultation outcome at glance

Focus/ Section	Responses and BEREC assesment
GENERAL REMARKS	<p>Support for BEREC strategies direction – some concerns in presenting strategic priority 4 as stand alone</p> <p>BEREC response: balance amongst its 5 strategic priorities</p>
MARKETS AND TECH DEVELOPMENTS	<p>Supportive of BEREC survey, but more focus on NTN role and quantum computing</p> <p>BEREC response: Explicit reference to NTN in the Strategy and follow the evolution of quantum computing</p>
PRIORITY 1 CONNECTIVITY AND DSM	<p>Endorsment of regulatory approach to connectivity developments – greater attention to NTN role and MVNOs role in IoT and connected vehicle connectivity</p> <p>BEREC response: Explicit mention of focus on IOT developments</p>
PRIORITY 2 COMPETITION DRIVEN AND OPEN DIGITAL ECOSYSTEMS	<p>Broad support for ex-ante regulation applied on the basis of the principles of flexibility and proportionality</p> <p>BEREC response: Reaffirm commitment to apply SMP Regulation in a targeted and flexible way</p>
PRIORITY 3 EMPOWERING END USERS	<p>Support for sector specific rules and technologically neutral approach</p> <p>BEREC stressed commitment</p>

The public consultation outcome at glance

Focus/ section	Responses and BEREC assesment
PRIORITY 4 SUSTAINABLE SECURE RESILIENT INFRASTRUCTURES	<p>Respondents stressed importance of security and resilience across the Whole telecom supplychain as well as of common indicators and benchmarks to be adopted in a code for the sustainability of telecom networks</p> <p>BEREC confirms its committment on resilience, cybersecurity as well as on environmental sustainability</p>
PRIORITY 5 BEREC CAPABILITIES	<p>Suggest to expand structured stakeholder dialogue</p> <p>BEREC committed to be at the forefront of evidenvce based regulation and effective communication with stakeholders</p>
INSTITUTIONAL AND INTERNATIONAL COOPERATION	<p>Support also for cross-border dialogue</p> <p>BEREC welcomes committment to international cooperation</p>



Final BEREC strategies 2026 - 2030

Key elements

Adjustments on the mission statement – embedded flexibility for responsiveness

BEREC aims at fostering independent, **forward looking**, consistent and high-quality regulation of digital **infrastructures and services** for the benefit of Europe and its citizens

Priorities: Art. 3 EECC + Action Plan 2030

Priorities

1. Promoting full connectivity and the Digital Single Market
2. Supporting competition-driven and open digital ecosystems
3. Empowering end-users
4. Contributing to environmentally sustainable, secure and resilient digital infrastructures
5. Strengthening BEREC's capabilities and continuous improvement

Institutional and international cooperation

Changes after public consultation

- **Stakeholders' inputs:**
 - Signal the NTN role to reinforce network resilience
 - Follow M2M/IoT developments, in particular in the context of permanent roaming
- Policy developments after PL2 (e.g., Digital Omnibus)
- Full WG AND CN review - wording improvements
- Proofreading
- **No substantial changes compared to the PL 2version**

Draft BEREC Report on switching and termination of contracts

End User Working Group

Marina Ljubić Karanović (HAKOM), Indrė Jurgelionienė (RRT)

Background – Article 106 of the EECC



BEREC Report on
Terminating
Contracts and
Switching Provider
([BoR \(19\) 27](#))

Summary Report
on the BEREC –
BEUC Joint
Workshop on the
application of
rights of end-users
in the EECC ([BoR
\(23\) 25](#))

BEREC Summary
Report on end-
user rights ([BoR
\(24\) 140](#))

BEREC Opinion
on Article 123
([BoR \(24\) 180](#))

Methodology

Switching providers + number portability (Article 106)



Seamless process

Convenience for the end-user

Contact only the receiving provider



Switching provider

Cooperation between providers

Free of charge for the process



Time

Obligation for timely switching

Switching without undue delay



Competition

Additional possibility to ensure competitive market



Focus on the national implementation of Article 106 of the EEC



Interplay with Articles 105 and 107 of the EEC



Questionnaire to the NRAs

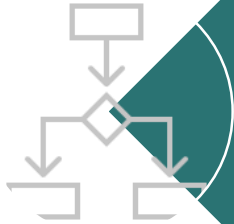


Received 30 responses (25 EU and 5 non-EU)

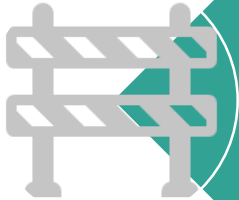


Not Opinion, but fact finding

Structure of the report



First part examines the switching process, including its implementation and all the actions required for completing the process

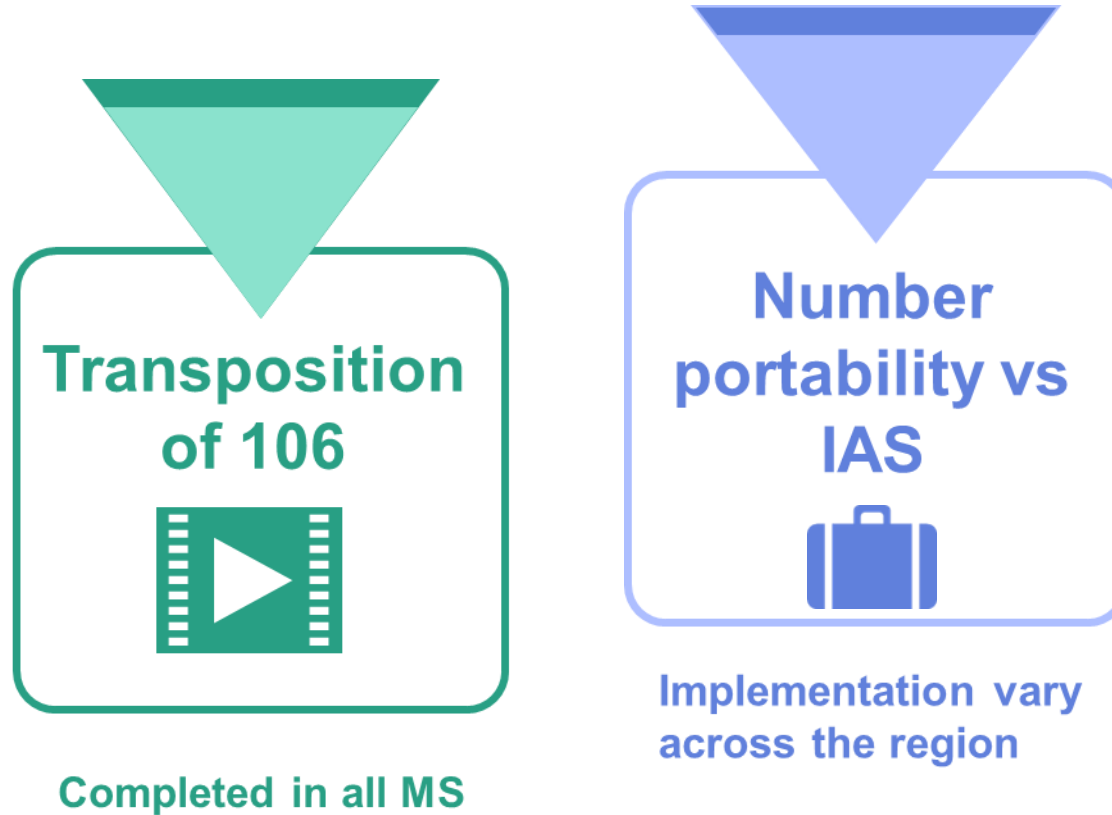


Second part considers the main disincentives and challenges identified in relation to the switching procedure and terminating contracts

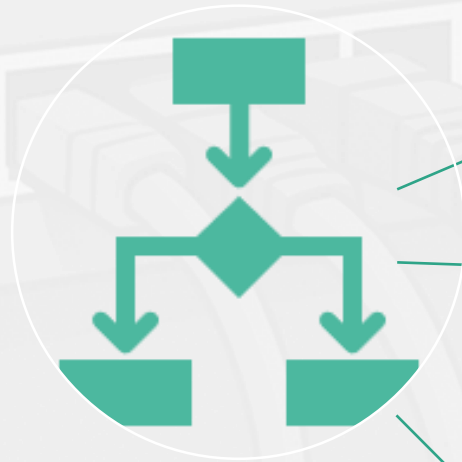


Third part addresses the specific end users' rights in the context of the switching process

Main findings – general



First part - process



Main findings in: scope of services, initiation, verification and consent, re-portability, provider cooperation, deadlines, delays and cancellations

Different national implementation - rejecting portability requests, different treatment of fixed and mobile portability

Divergences in rights to withdrawal in relation to porting and switching providers

Second part - disincentives



Contractual



Provider-
related/procedural



Technical factors and



Behavioural factors
discouraging switching

High early termination fees,
charges for purchased
equipment - the main reasons
for end-users not switching

Fear of service disruption
during switching-
Billing issues (double billing),
Handset unlocking and
too complicated or too long
steps of the procedure

Third part – end-user rights



Compensation/calculation/exceptions (consumers may be entitled to claim damages; but, in the majority of countries, such matters fall within the jurisdiction of the courts)

Dispute resolution competence (15 NRAs)

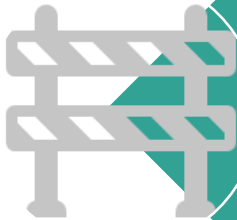
Service loss during switching (more than 1 working day - reasons of technical nature)

Phase out of legacy technologies (most NRAs reported that they do not have any hard-law, some MSs have specific guidelines)

Highlights



BUNDLE SERVICES - loss of discounts, conclusion of a new contract/new duration and price, no right to terminate the contract without penalty



IN-VEHICLE CONNECTICITY AND SWITCHING - no dedicated process, default provider chosen by manufacturer, 'lock-in' effect



IN-CONTRACT INDEXATION PRICE INCREASE - termination with penalty, conditions differ among MS raise doubts in relation to objectives of the EECC

Next steps

Public consultation
6 weeks

Adoption of final
Report in June
2026

Draft BEREC Guidelines on Geographical surveys of network deployments

Remedies and Market Monitoring Working Group
Annegret Groebel (BNetzA), Marco Benacchio (AGCOM),
Begoña García Mariñoso (CNMC)

Background

The Geographical survey ('GS')

- Article 22(1) of the EECC sets the obligation
 - **survey of the reach of electronic communications networks capable of delivering broadband**
 - update at least every **three** years
 - **forecast** of the reach of VHCN (optional)

Purposes of the GS :

- **tasks** of NRAs/OCAs **under the EECC**
- surveys required for the application of **State Aid**

Role for BEREC:

- **issue guidelines** to assist NRAs and/or OCAs on the consistent implementation of their obligations under Article 22

Background

BEREC Guidelines ('GL') :

- BEREC Guidelines to assist NRAs on the consistent application of geographical surveys of network deployments, - the Core Guidelines – BoR (20) 42
- BEREC Guidelines on geographical surveys of network deployments – Article 22 (2), 22 (3) and 22 (4), BoR (21) 32
- BEREC Guidelines on geographical surveys of network deployments – Verification of information, BoR (21) 82

Implementation report on the BEREC Guidelines on GS of network deployments BoR (24) 146

- **Conclusions:** it is appropriate **to update the Core Guidelines** to take into account the implementation report findings, soft law and technology developments since 2020

The proposal for public consultation

Current proposal to submit to stakeholders amendments to the Core GL (BoR (20) 42) **strictly when needed**

- The Core GL overall have contributed to a substantially increasing **number** of GS across the EU and improving their **granularity**, the quantity and breadth of information retrieved and **comparability**;
- “*There is **room for improvement** regarding the approaches to implement the Guidelines to achieve **further** harmonization and with this increase the comparability across MS*” (BoR (24) 146).

The proposal for public consultation

List of main changes (1/2)

- **Introduction of “premises activated” as optional indicator**
- Some speeds declared optional for fixed broadband
 - But quoted as “indispensable in specific state aid cases”
- **Consideration of FWA network capacity in declaring FWA coverage**
- Technology: Additional information may be required in case of “other” (“non classified”) technology
- **Consistency with the revision of BEREC VHCN Guidelines**

The proposal for public consultation

List of main changes 2/2

- **Guidance on the use of cell edge coverage as an alternative reasonable approach (cell area) to assess that a grid is passed with a mobile technology**
- Indoor coverage quality optional
- **Reference to Verification Guidelines (BoR (21) 82) in Core Guidelines**
 - **It aims strengthening the message that BB maps need to be verified**
 - **Reliability requirement promotes consistency of QoS-2 tests (mobile broadband)**
- Speed classes (Table 7, annex 2)
 - No updates in the text open to consultation, but explicit question to stakeholders about the need to update speed classes

The consultation phase – procedural aspects

BEREC considered timely to launch the public consultation while the EC is working on the EC “Methodology on 5G Mobile and Fixed QoS Coverage Mapping”

1. BEREC is now consulting on the document showing the changes and also asking stakeholders about the need to update speed classes
2. This also includes a longer consultation period (60 days) and to adopt the final Art. 22 GS GL in P2/2026
3. The mobile broadband part may be further updated in light of the forthcoming EC methodology on 5G Mobile and Fixed QoS Coverage Mapping **at the end of the consultation period**

BEREC updates

BEREC Chair
Robert Mourik (ComReg)

Executive Vice-President of the European Commission Henna Virkkunen visit to the BEREC Office

23 October 2025

- BEREC Office support to BEREC
- BEREC role in shaping the EU digital future



Do not miss out!

- Public workshop on migration and copper switch-off in light of the DNA in Q1
- **19 March 2026** - **BEREC public debriefing** - online
- **31 March 2026** - **14th BEREC Stakeholder Forum** – in Brussels and online



Public consultations

Document title	Deadline
Draft BEREC Report on switching and termination of contracts	20 January 2026
Draft BEREC Guidelines on Geographical surveys of network deployments	9 February 2026

Other BEREC Publications

Document title

BEREC Regulatory Accounting in Practice Report 2025

BEREC Summary Report on the external workshop on environmental footprint of satellite constellations

BEREC Report on domestic submarine cables connectivity in Europe

BEREC Guidelines on Very High-Capacity Networks

Upcoming BEREC Publications

BEREC External Study on data centres

Call for Inputs – 5G Network Slicing

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