

66th Ordinary Plenary Meeting of the BEREC Board of Regulators (BoR)

Virtual Meeting

Conclusions

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Services of the Republic of Slovenia (AKOS)

12 March 2026

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Annex I – Action points from the 66th BEREC BoR Plenary Meeting

Main results of the 66th Meeting of the BEREC Board of Regulators

The BEREC Board of Regulators ('BoR') held its 66th Ordinary Plenary Meeting virtually on 12 March 2026.

During the meeting, the BoR discussed and/or approved the following documents:

1. Documents approved as 'A' items:

1.1 For publication:

- BoR (26) 28 Draft 32nd BEREC International Roaming Benchmark Data Report
- BoR (26) 29_1 Draft BEREC Summary Report on BEREC-BEUC joint workshop on end-user rights

For internal use and submission to NIS CG:

- BoR (26) 30 Draft BEREC Internal report - Analysis of the results of the BEREC-NIS Cooperation Group Operator Survey on the Supplier Landscape

2. Documents approved as regular items:

2.1. For publication:

- BoR (26) 40 Draft BEREC Calendar of international meetings and events in 2026

For public consultation:

- BoR (26) 36 Draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions
- BoR (26) 37 Draft BEREC Retail Roaming Guidelines
- BoR (26) 38 Draft BEREC Wholesale Roaming Guidelines
- BoR (26) 39 Draft BEREC Report on Virtual Worlds and Web 4.0

For internal use:

- BoR (26) 29_2 Draft BEREC Summary Report on BEREC-BEUC joint workshop on end-user rights

3. Documents submitted for information purposes:

- BoR (26) 32 Contact lists pack
- BoR (26) 33 Information on the planned electronic voting procedures
- BoR (26) 34 Information on the electronic voting procedures since the last plenary meeting
- BoR (26) 35 Work Programme 2026 status update
- BoR (26) 41 Draft High-Level BEREC Assessment of the main areas of intervention of the Digital Networks Act

4. Other main topics discussed

The BoR was briefed on the recent activities of the BEREC Chair, the important projects carried out by the BEREC Office in support of BEREC, and BEREC's recent and forthcoming international activities.

The European Commission (EC) was invited to provide information on important recent developments and activities under its remit that have an impact on the electronic communications sector. The EC Representative also provided an update on the Digital Networks Act (DNA).

The BoR was informed about the 14th Stakeholder Forum programme and further work on the BEREC Work Programme 2027.

5. Next meeting

The next Ordinary Plenary Meeting of the BoR will take place in hybrid format on **2 June 2026 in Ireland**.

6. Follow-up actions

The follow-up actions arising from the conclusions of the meeting are presented in Annex I to the Minutes.

Introduction and participation

The BEREC BoR held its 66th Ordinary Plenary Meeting virtually on 12 March 2026.

The meeting was attended by the Heads and/or High-level Representatives of the National Regulatory Authorities ('NRAs') from each EU Member State, who have primary responsibility for overseeing the day-to-day operations of the markets for electronic communications networks and services. The EC also took part in the meeting. Heads and High-level Representatives of the NRAs with whom BEREC has concluded working arrangements were also present.

The list of attendees of the 66th BoR Meeting is included in Annex II to the Minutes.

List of documents

The list of documents distributed for the 66th BoR Meeting is included in Annex III to the Minutes. The list of final documents approved by the meeting for publication, in compliance with the BEREC Regulation and the BoR transparency rules, is presented in Annex IV to the Minutes.

Items discussed

A short overview of the information presented under each agenda item, a summary record of the proceedings and a record of the conclusions reached by the BoR are presented below.

1 Opening of the meeting and adoption of the agenda

Document(s)	BoR (26) 27 Draft BEREC BoR Agenda
Introduction by	BEREC Chair (AKOS)
Information presented	<p>The BEREC Chair welcomed the meeting participants and provided practical information on meeting logistics.</p> <p>He also introduced the new BEREC members:</p> <ul style="list-style-type: none"> - Member of BoR/MB - Ms Mickie Schoch, new Director of ACM, the Netherlands; and - Member of BoR/MB - Mr Frederik Rygaard, DCCA, Denmark. <p>The BEREC Chair opened the meeting and presented the draft agenda for approval by the BoR. The BoR was invited to suggest any additional issues to be raised or presented under 'Any Other Business' (AOB).</p>
Conclusion	The BoR adopted the agenda with no changes.

2 List of "A" items

Document(s)	<p>BoR (26) 28 Draft 32nd BEREC International Roaming Benchmark Data Report</p> <p>BoR (26) 29 Draft BEREC Summary Report on BEREC-BEUC joint workshop on end-user rights</p> <p>BoR (26) 30 Draft BEREC Internal report - Analysis of the results of the BEREC-NIS Cooperation Group Operator Survey on the Supplier Landscape</p>
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Introduction by	BEREC Chair (AKOS)
Information presented	The BEREC Chair presented the list of 'A' items as set out above. The list of 'A' items was drawn up based on the conclusions of the Contact Network (CN) meeting held on 19 February 2026, according to which the BoR's approval of the documents should be possible without further discussion. The BEREC Chair informed the BoR members that, if needed, they could still make statements for the minutes on any of the 'A' items. If a position taken on an 'A' item leads to further discussion, or if a member of the BoR requests it, the item would be withdrawn from the list of 'A' items.
Conclusion	The BoR approved the documents included in the 'A' item list.

3 Information from the BEREC Chair

Document(s)	BoR (26) 31 Division of tasks within the Mini Board
Introduction by	BEREC Chair (AKOS)
Information presented	<p>The BEREC Chair briefed the BoR on the outcome of the recent important meetings he has held and on the meetings he will attend.</p> <p>He also informed the BoR about:</p> <ul style="list-style-type: none"> - BEREC Organisational Activity Several Mini Board meetings have already taken place. The CN Chair chaired the CN meeting on 19 February and, together with the Mini Board and BoR members, represented BEREC at MWC Barcelona that featured a full and demanding agenda. - BEREC/IRG Event MWC featured a full and demanding agenda. BEREC co-hosted, for the first time, an event with Members of the European Parliament alongside the IRG. This joint initiative received very positive feedback and was viewed as a successful step in strengthening engagement. - Elections and Appointments Tonko Obuljen (HAKOM) elected as 6th member to DMA HLG; Paolo Castiglione (RTR) elected as Co-Chair of the Fixed Network Evolution Working Group. - Progress of Work on the DNA assessment Work on the DNA is progressing well, supported by several calls and meetings with the RF WG Co-Chairs. Two expert-level workshops have already been held with the EC, with another planned for 20 February 2026. More than 100 experts are contributing to the work, which has been highlighted as a major achievement. A High-Level workshop with the EC is scheduled for 30 March, taking place back-to-back with the Stakeholders' Forum. - Phase II Regulatory Case AKOS acted as rapporteur on the Romanian case in Phase II where a careful study was carried out. Their assessment did not support the doubts expressed by the EC. - Work Programme and Internal Processes

	<p>Despite the very busy start to 2026, the WP is progressing according to plan. Several e-votes have already taken place.</p> <ul style="list-style-type: none"> - BEREC Chair's Monthly Newsletter A reminder was issued regarding the monthly newsletter as a helpful tool for staying informed, with feedback welcomed. - Events Attended by the BEREC Chair <ul style="list-style-type: none"> • Visit to the President of the European Council, Mr. Costa, to present BEREC's initial high-level position on the DNA. • Participation in discussions on competition and consumer protection in the DNA with Members of the European Parliament, the European Commission, and regulatory experts at the Future Connectivity Conference, Euro 2026. • Digital Summit Latam 2026 where the BEREC Chair engaged in an exchange of perspectives with representatives from Latin America, gaining a better understanding of cross-regional challenges, including digital infrastructure, spectrum policy, and regulatory approaches. • BEREC-GSMA roundtable in Barcelona where mixed feedback was received from market players, and a new format may be explored for next year. GSMA also expressed interest in further exchanging views on the DNA assessment.
Conclusion	To take note of the information.

4 Information from the BEREC Office

Document(s)	<p>BoR (26) 32 Contact lists pack BoR (26) 33 Information on the planned electronic voting procedures BoR (26) 34 Information on the electronic voting procedures since the last plenary meeting BoR (26) 35 Work Programme 2026 status update</p>
Introduction by	BEREC Office Representative
Information presented	<p>The BEREC Office (BO) submitted to the BoR information on the updated contact lists for the BEREC Heads, CN members, and the BEREC Office, the recent and planned electronic voting procedures, and the implementation status of the 2026 BEREC Work Programme (WP-2026). The BO Representative also updated the BoR on:</p> <ul style="list-style-type: none"> - the WP-2026 progress; - WGs meetings; - Support to BEREC WGs including Workshops & Phase-II cases in 2025; - the BEREC Study on Data Centers; - the environmental footprint of BEREC and of the BEREC Office for 2025; and - the timeline for the BEREC Annual Report 2025.
Conclusion	The BoR took note of the information.

5 Information from the European Commission

Document(s)	No document
Introduction by	European Commission Representative
Information presented	<p>The European Commission (EC) Representative informed the BoR about the EC's main activities in the field of electronic communications and other relevant activities since the last plenary meetings. The EC's main activities were described in a paper circulated to the BoR for information before the meeting.</p> <p>Roaming The EC welcomed Moldova and Ukraine's accession to the Roam Like at Home (RLAH) regime, noted the absence of major issues while emphasising the need for continued monitoring, and explained that Member States are assessing its proposal to extend RLAH to the Western Balkans, with negotiations to begin if endorsed following the proposal's recent presentation and the start of discussions in the Council.</p> <p>Digital Omnibus and Digital Fitness The EC informed the BoR that the Digital Omnibus stakeholder consultation is ongoing until 13 March and the public consultation on Digital Fitness closed yesterday with BEREC's input acknowledged.</p> <p>Digital Decade Policy Programme The EC noted that work on the 2026 Digital Decade report is progressing, supported by recent Member State missions involving NRAs, and highlighted that the report will play a key role in informing future investment needs under the next Multiannual Financial Framework.</p> <p>Gigabit Infrastructure Act (GIA) The EC is engaging with BEREC on guidance under Article 3 of the GIA and next steps are being prepared, with the intention to share them with the relevant BEREC WG in March or April.</p> <p>Review Report on the functioning of Delegated Regulation on EU Termination Rates The EC explained that the Review report on the functioning of the delegated regulation was issued together with the DNA proposal and expressed appreciation for BEREC's contributions, noting that the Review report concludes that the Delegated Act on TRs is functioning effectively and offering market clarity. The Review report also identified certain outstanding issues particularly regarding third-country participation and matters not covered in the annex, relating to the part of the market that is unregulated, as no request had been made to have the TRs adjusted and assessed by the EC considering the mechanics envisaged under the Act.</p> <p>Digital Networks Act (DNA) EC reported on the DNA proposal, adopted on 21 January, and the progress since then.</p> <ul style="list-style-type: none"> – State of play with co-legislators <p>The EC has presented the full DNA proposal and an initial assessment to the Council Working Party, which has begun its first reading on objectives, scope and resilience, with further discussions - including on end users - continuing in April and a progress report expected in June under the Cypriot Presidency. Parallel thematic workshops with NRAs on topics such as copper switch-off, access, passporting, spectrum and governance are helping address Member State questions, while discussions with the Irish Presidency aim to complete the first reading and reach a general approach by December, and in the European Parliament rapporteurs have been</p>

	<p>appointed with ITRE planning a similar first-reading exercise in October to enable trilogues early next year.</p> <p>– Stakeholder feedback and next steps</p> <p>The EC reported constructive discussions and a strong interest in BEREC's input ahead of the 30 March meeting, noting positive initial feedback from BEUC, FTTH stakeholders and ECTA, while some large operators raised concerns on spectrum, satellite issues, open-internet ambition and copper switch-off. The EC stressed that work on the proposal is advancing rapidly and reaffirmed its commitment to an open, constructive process aimed at swift finalisation.</p>
Conclusion	The BoR took note of the information.

6 Market and Economic Analysis (MEA)

Document(s)	BoR (26) 36 Draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions
Introduction by	MEA WG Co-Chairs (ANCOM/CNMC)
Information presented	<p>The MEA WG Co-Chairs reported on the analysis benchmarks EU fixed and mobile broadband networks and services against major global jurisdictions, assessing coverage, take-up, pricing, quality, impacts of consolidation, regulatory approaches and financial performance. They described the EU as performing strongly overall, with top Member States ranking among global leaders. EU fibre coverage and penetration were noted to exceed those in the USA but lag behind Japan, while high-speed broadband take-up remained below China and the USA, considering that there are other technologies beyond fibre that are capable of delivering high speeds. EU 5G coverage was reported as broadly comparable to the USA and China. The EU was also described as one of the cheapest broadband markets, consistently ranking first or second across pricing categories, although its download speeds generally trailed leading jurisdictions. However, the EU was said to perform around average on upload speeds and to lead on latency, with several Member States achieving top global rankings.</p> <p>The MEA WG Co-Chairs further highlighted structural and regulatory factors shaping performance. The EU's urban–rural 5G divide was reported as similar to the USA and China, while rural fixed coverage lagged slightly behind the OECD average. Consolidation was described as possible under EU rules but frequently subject to remedies, with evidence suggesting that it results in higher prices and uncertain investment benefits. The EU's regulatory model was characterised by ex-ante oversight and wholesale access obligations, contrasting with more ex post or state-directed approaches in other jurisdictions. European operators were reported to be financially healthy on average (albeit with sometimes non-negligible differences among individual operators), with stable margins, strong cash flow, peaking investment and broadly positive outlooks as fibre and 5G roll-outs matured, supported in the biggest markets by major investment from challenger operators.</p>
Conclusion	The BoR approved the document for public consultation.

7 Roaming (ROAM)

Document(s)	BoR (26) 37 Draft BEREC Retail Roaming Guidelines BoR (26) 38 Draft BEREC Wholesale Roaming Guidelines
Introduction by	ROAM WG Co-Chairs (RTR/EETT)
Information presented	<p>The ROAM WG Co-Chairs noted that the Guidelines required updating to reflect the extension of the EU RLAH area to include Ukraine and Moldova, following decisions under their respective Association Agreements with the EU. The revised approach clarified how internal market treatment and RLAH would apply.</p> <p>The changes were considered likely to affect areas such as pricing and fair use policies, transparency rules, exchange rates, value-added and emergency services, and associated databases, as well as sustainability applications. Although not all impacts fell directly within the scope of the Guidelines, related adjustments were anticipated for the WG's data collection templates. Next steps included a 30-day public consultation on both clean and tracked-changes versions of the Guidelines, efforts to finalise the documents in the second half of 2026, and the circulation of updated data collection templates to operators for comment in the second quarter of 2026.</p>
Conclusion	The BoR approved the document for public consultation.

8 Planning and Future Trends (PFT)

8.1 Draft BEREC Report on Virtual Worlds and Web 4.0

Document(s)	BoR (26) 39 Draft BEREC Report on Virtual Worlds and Web 4.0
Introduction by	PFT WG Co-Chairs (CNMC/AGCOM)
Information presented	<p>The PFT WG Co-Chairs explained that virtual worlds were defined as persistent, immersive 3D environments and positioned as a core element of Web4, which aimed to blend physical and digital spaces through technologies including AI, IoT, XR and blockchain. They highlighted features such as immersivity, synchronicity, persistence and interoperability, alongside challenges related to governance, user rights, environmental impact and cross-border regulation. Use cases such as digital twins, city-scale simulations, immersive collaboration, education, healthcare and entertainment were said to depend on extremely high-performance connectivity. The Co-Chairs also reported that virtual worlds and Web4 would place far stricter demands on networks than today, with requirements varying by data rates, volumes and latency. New infrastructure, including edge computing, and emerging standards such as Wi-Fi 7/8, F5G Advanced and 6G were expected to be central, supported by cloudification, virtualisation, integrated sensing and deeper AI-driven network management.</p> <p>The Co-Chairs further set out implications for operators and regulators, noting opportunities in areas such as premium quality of service, network slicing, edge services and digital-twin-based offerings, but stressing uncertainties around demand, willingness to pay and sustainable business models. Regulators were said to need strong, predictable incentives for investment in high-capacity networks, spectrum, edge and cloud infrastructure, along with safeguards for openness, competition and</p>

	inclusion. The Co-Chairs concluded that virtual worlds and Web 4 would emerge at the intersection of advanced connectivity, cloudification and AI, but within a complex and evolving ecosystem marked by asymmetric power and risks of value shifting away from the telecom layer.
Conclusion	The BoR approved the document for public consultation.

8.2 Oral update on draft BEREC Work Programme 2027

Document(s)	No document
Introduction by	Incoming BEREC Chair (CNMC)
Information presented	<p>The outline of the 2027 Work Programme (WP) was described as focusing on mandatory tasks arising from EU legislation, expected carry-overs from 2026, and routine recurring work. The Incoming BEREC Chair noted that any additional work identified during the 2026 cycle would also be considered. The overall content was expected to be submitted to the European Parliament, the Council and the EC in line with Article 21 of the BEREC Regulation.</p> <p>Preparation of WP 2027 was said to follow a structured timeline, beginning with internal and external calls for input between 27 February and 15 April, supported by a public debrief after the P1 meeting on 19 March and a Stakeholder Forum on 31 March. Prioritisation was due for discussion at the CN/PL 2 meeting in mid-May or early June, followed by coordination with Co-Chairs and a call for drafters throughout June and July. A consultation draft was planned for CN/PL 3 in September or October, ahead of finalisation at CN/PL 4 in November or December.</p> <p>The Incoming BEREC Chair added that a call for drafters for non-mandatory work was foreseen for July, alongside an early call for resources after P4, and that alignment with EWG planning by year-end would be essential. Although the DNA was considered unlikely to be in force by 2027, the Chair suggested maintaining a light workload to ensure flexibility and draw on ongoing developments.</p>
Conclusion	The BoR took note of the information.

8.3 BEREC International Cooperation

Document(s)	BoR (26) 40 Draft BEREC Calendar of international meetings and events in 2026
Introduction by	BEREC Vice-Chair responsible for international activities (ComReg)
Information presented	<p>The BEREC Vice-Chair responsible for international activities reported that BEREC's 2026 international work would prioritise strengthening cooperation to address cross-border regulatory challenges and to promote the European regulatory approach globally, in line with wider EU external engagement. Cooperation would continue with regional partners such as EaPeReg, EMERG, REGULATEL and African regional organisations, and with multilateral and bilateral counterparts including the ITU, CEPT, the FCC, the CRTC and TRAI. BEREC WGs were said to be planning several international activities, and a Mini Board study trip to Japan is scheduled for October 2026.</p>

	<p>Regarding REGULATEL, he reported that a joint WG meeting and a BEREC-REGULATEL Summit were planned for the same week in June 2026 at the AECID Training Centre in Cartagena de Indias, Colombia, with dates to be confirmed. As ANACOM would assume the REGULATEL Presidency in 2027, the 2026 plenary meeting would take place in Portugal.</p> <p>For EaPeReg, he noted that the first plenary meeting would be held in May 2026 in hybrid format in Yerevan and online, with a second hybrid plenary meeting planned for December 2026 in Prague and online.</p>
Conclusion	The BoR took note of the information and approved the document for publication.

9 Oral update on the 14th BEREC Stakeholder Forum

Document(s)	No document
Introduction by	Incoming BEREC Chair (CNMC)
Information presented	The Incoming BEREC Chair presented to the BoR the Agenda of the 14 th Stakeholder Forum which will take place in Brussels, Belgium, on 31 March 2026.
Conclusion	The BoR took note of the information.

10 AOB

Information on the 67th BoR plenary meeting (2 June 2026, Dublin, Ireland)

Document(s)	No document
Introduction by	Representative of the host NRA (ComReg)
Information presented	The Representative of the host NRA provided information on the logistics of the 67 th BoR plenary meeting, which will take place on 2 June 2025 in Ireland.
Conclusion	The BoR took note of the information.

11 Regulatory Framework (RF)

Document(s)	BoR (26) 41 Draft High-Level BEREC Assessment of the main areas of intervention of the Digital Networks Act
Introduction by	RF WG Co-Chairs (AGCOM/NMHH)
Information presented	<p>The RF Working Group Co-Chairs presented their initial high-level assessment of the main areas of intervention of the DNA as follows:</p> <ul style="list-style-type: none"> – Activities to date and those upcoming – Policy and Regulatory Objectives – Scope of Application – Resilience

	<ul style="list-style-type: none"> – General Authorisation – General Authorisation: The Single Passport – Fixed access regulation – Spectrum – End Users' protection, Universal Service, Open Internet – The institutional layout: NRAs and BEREC – The institutional layout: The Relationship among the Actors – Discussion – The Way Forward – Discussion – Detailed BEREC Opinion
Conclusion	<p>The BoR took note of the information and agreed that a short paper should be submitted to the BEREC Chair by 20 March, followed by electronic clearance and final approval in the week commencing 23 March.</p> <p>Further, the BoR agreed that a technical document should be finalised for approval around P2.</p>