

Public debriefing

19 March 2026

Outcomes of the 66th BEREC ordinary plenary meetings

Programme

- Outline BEREC Work Programme 2027
- Draft BEREC Retail and Wholesale Roaming Guidelines

Q&A session

- Draft BEREC Report on Virtual Worlds and Web 4.0
- Europe's Telecom Reality Check: Draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions
- BEREC responses to the European Commission's Digital Fitness Check & Digital Omnibus
- BEREC updates

Q&A session

Outline BEREC Work Programme 2027

Incoming BEREC Chair
Alejandra de Iturriaga Gandini (CNMC)

Main Steps

- **Outline adopted by the BoR 28 January 2026** (Art. 21 BEREC Regulation)
- **Sent to EU Institutions 30 January 2026** (Art. 21 BEREC Regulation)
- **WP 2027 to be finally adopted December 2026** (Art. 21 BEREC Regulation)

Guiding Force WP 2027

High Level Strategic Priorities BEREC 2026-2030

- Promoting full connectivity and Digital Single Market
- Supporting open and competition-driven digital ecosystems
- Empowering end-users
- Contribution to sustainable, secure and resilient digital infrastructures
- Strengthening BEREC's capabilities and continuous improvement

Early Call for Inputs

- Launched 27 February – **Deadline 15 April** (EoB) on the BEREC website
<https://www.berec.europa.eu/en/public-consultations-calls-for-inputs/early-call-for-inputs-on-the-berec-work-programme-2027>
- Input to be provided in an **Excel** template
- Please submit your contributions via email to:
BEREC-WP2027@DISTRO.BEREC.EUROPA.EU

Next steps towards the WP 2027

27 February – 15 April

- Call for inputs

31 March

- 14th BEREC Stakeholder Forum, Brussels

October

- Public consultation on the draft

December

- Final document

Draft BEREC Retail and Wholesale Roaming Guidelines

International Roaming Working Group
Elisabeth Felber (RTR), Ioanna Choudalaki (EETT)

Update of Guidelines necessary

- To take into account the geographical extension of the EU “Roam Like At Home” (RLAH) area to include Ukraine and Moldova
- Based on decisions taken in accordance with the Association Agreements between:
 - the European Union and Ukraine
 - the European Union and Moldova

Roaming Internal Market Treatment and RLAH applicability

Recognize(s) as internal market:	EU Member States	EEA EFTA States (IS, LI, NO)	Ukraine	Moldova
EU Member States	Yes	Yes	Yes	Yes
EEA EFTA States (IS, LI, NO)	Yes	Yes	No	No
Ukraine	Yes	No	N/A	No
Moldova	Yes	No	No	N/A

Effect on

- Prices & FUP
 - Transparency Provisions
 - Exchange rates
 - VAS & Emergency Services and relevant Databases
 - Sustainability applications
-
- → Not part of the GL → but effect also on data collection templates, which the Roaming Working Group currently updates

Next steps

- Public consultation deadline: **17 April 2026**
- Both clean and TC documents will be provided to help stakeholders in the review
- The finalized GL will be adopted at P2
- New data collection templates will be shared with operators for their comments in Q2 2026

Draft BEREC Report Virtual Worlds and Web 4.0

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

General context

- **Definitions:** **VW** as persistent, immersive 3D real-time digital environments; essential building block for the broader **Web 4.0**, the 4th internet generation using advanced technologies (AI, IoT, XR, blockchain or VW) to blend the physical and digital worlds
 - **Key defining characteristics:** Immersivity, Synchronicity, Persistence, Unity (interoperability), Mass creation
 - **General challenges:** Interoperability, Environmental impact, Users' rights, Governance and jurisdiction
 - **Representative use cases:** cityverse, digital twins, immersive collaboration, telemedicine, immersive entertainment, tele-operated mobility, immersive education
- **All rely on very high-performance connectivity**

Implications for connectivity

Network requirements for the provision of VW/Web 4.0

- Desk research (data traffic, data rates and latency);
- Thresholds differ depending on the scenarios & use cases;
- However, consensus on stricter network performance requirements that networks can deliver today;
- Digital infrastructures (e.g. edge node) will be required.

Network developments to deliver VW/Web 4.0

- ECN standards (Wi-Fi 7/8; F5G-A; 6G) aiming to contribute to VW/Web 4
- Additional propositions common to all ECN:
 - Virtualization and cloudification;
 - 3C networks (tightly integrated computing, caching and communication systems);
 - Integrated sensing and communication;
 - AI and ECN/S integration.

Implications for connectivity

Network requirements for the provision of VW/Web 4.0	Network developments to deliver VW/Web 4.0
<ul style="list-style-type: none">• Desk research (data traffic, data rates and latency);• Thresholds differ depending on the scenarios & use cases;• However, consensus on stricter network performance requirements that networks can deliver today;• Digital infrastructures (e.g. edge node) will be required.	<ul style="list-style-type: none">• ECN standards (Wi-Fi 7/8; F5G-A; 6G) aiming to contribute to VW/Web 4• Additional propositions common to all ECN:<ul style="list-style-type: none">○ Virtualization and cloudification;○ 3C networks (tightly integrated computing, caching and communication systems);○ Integrated sensing and communication;○ AI and ECN/S integration.

Impact on telco and business models

Opportunities for ECN/S providers

- Advanced connectivity (premium QoS, slicing)
- Edge computing services
- Network-as-a-Service (APIs)
- Digital twins & sensing networks

Major uncertainties

- Demand and willingness to pay
- Market structure (open vs closed ecosystems)
- Return on investment

BOTTOM- LINE: risk of platform concentration and value capture outside the telecom layer

Regulatory challenges

- **Investment & Infrastructure**
 - Need strong incentives for **VHCN, 5G/6G, edge & cloud**
 - **Regulatory predictability** essential (co-investment, sharing)
 - Ex-ante regulation, public funding & partnerships remain critical
- **Openness & Interoperability**
 - Open internet regulation remains the backbone to non discrimination
 - Network differentiation must not undermine IAS
 - Interoperability and data portability prove pivotal
- **Digital divide and inclusion**
- **Spectrum**
 - **Timely and non discriminatory access to spectrum allocation**
 - Neutral and flexible licensing
- **Competition**
 - Strong network effects & platform power → lock-in risks
 - Platform issues addressed via DMA/DSA & competition law
 - ECN/S tools (SMP remedies, wholesale access, open internet) remain key

Conclusions

Systemic transition

- VW/Web 4.0 emerge at the intersection of **cloudification, AI and advanced connectivity**
- Scaling from legacy networks to **high-performance future connectivity** is essential **BUT**
- **Investment & market complexity**
- Ecosystem marked by **uncertain demand, unclear business models and RoI**
- Coexistence of **cooperation and competition** among actors with asymmetric power

Next steps

- Available for public consultation until 20 April 2026
- Final report and public consultation report to be published in October 2026

Europe's Telecom Reality Check: Draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions

Market and Economic Analysis Working Group
Iulia Zaim-Grigore (ANCOM), Jordi Canadell (CNMC)

Introduction

- Evolution of **fixed and mobile broadband services**
- Comparison of the EU-27 + top EU performers, with the situation in other jurisdictions (UK, USA, Canada, China, South Korea, Japan, Australia, when possible)
- Aspects/indicators we look at:
 - Fixed and mobile coverage and penetration; urban/rural divide
 - Pricing + QoS
 - Telecommunications access regulation highlights
 - Consolidation trends and implications for telecoms
 - Financial indicators outlook
- Main **sources** of data:
 - International public institutions: EC, OECD, ITU
 - National regulators as FCC (USA), MIC (Japan), CNNIC (China)
 - Data providers and industry: FTTH Council, Ookla
 - Financial and economic analysts: S&P, Fitch, Telecompaper, Felten et al.

Networks coverage and services take-up

- FTTP coverage & penetration
- Subscriptions \geq 100Mbps
- Subscriptions with Gigabit speeds per 100 inhabitants
- 5G coverage
- Mobile data traffic

- EU's FTTP coverage is higher (69%) than in the USA (56%), but far from Japan's (100%)
- EU's FTTP penetration is at 40%, higher than in the USA (29%), far from Japan (71%); *high variance among EU MS*
- If the top EU performers are considered, these are closer to the Asian economies.
- The EU, USA and Japan seem at par as regards the coverage-take-up gap.
- EU subscriptions at speeds of at least 100Mbps (72%) remain below China (95%) and the USA (82%), but comparable Gigabit subscriptions in the EU with the USA (9%) and ahead of Korea (7%).
- EU 5G coverage reached 94%, comparable to the USA and China (96%) and behind Korea (100%).
- Mobile data traffic is roughly comparable across the EU, USA and Korea (15GB in the EU).

Pricing and quality of services

- Standalone FBB [200Mbps, 1Gbps)
- Standalone FBB \geq 1Gbps
- 3-play (FBB, TV, FT) [200Mbps, 1Gbps)
- 3-play (FBB,TV,FT) \geq 1Gbps
- MBB 20GB
- MBB 50GB

EU consistently the cheapest or the second cheapest jurisdiction.

- **#1** for FBB only & 3-play [200Mbps, 1Gbps)
- **#2** for FBB only & 3-play \geq 1Gbps
- **#1** for MBB (20GB & 50 GB)

Similar services in the USA cost twice or three times as much as they do in the EU.

- Download & upload speeds
- Average latency

EU performs modestly in terms of download speeds (being in the lowest quarter), average in upload speeds and very good in terms of latency.

Urban/rural and consolidation trends

Urban/rural: The top EU performers are world/OECD leaders

- **Fixed (OECD countries):** the average rural coverage figure for the EU is marginally below the OECD average. Broadband coverage in rural regions of the USA slightly outperforms the EU.
- **Mobile (EU/USA/China):** the urban/rural divide in terms of 5G coverage in the EU (94/80%) is similar to that in the USA (97/82%) and China (95/85%).

Consolidation trends

- Consolidation **is possible** under current EU rules, both **cross-border & in-country** (*sometimes subject to remedies*).
- Several large operators are exiting secondary markets to refocus on core operations => **limited benefits from further scale**.
- Evidence shows mergers tend to **raise consumer prices, with uncertain effects on investment and innovation**.

Access regulation

SCOPE: access-regulation models providing context and diversity for the comparisons across the EU, USA, Canada, Australia, China, Japan, South Korea and UK

EU model

- coordinated by NRAs under an ex-ante regime (SMP, regular reviews)
- wholesale access
- a “ladder of investment” principle

Other frameworks

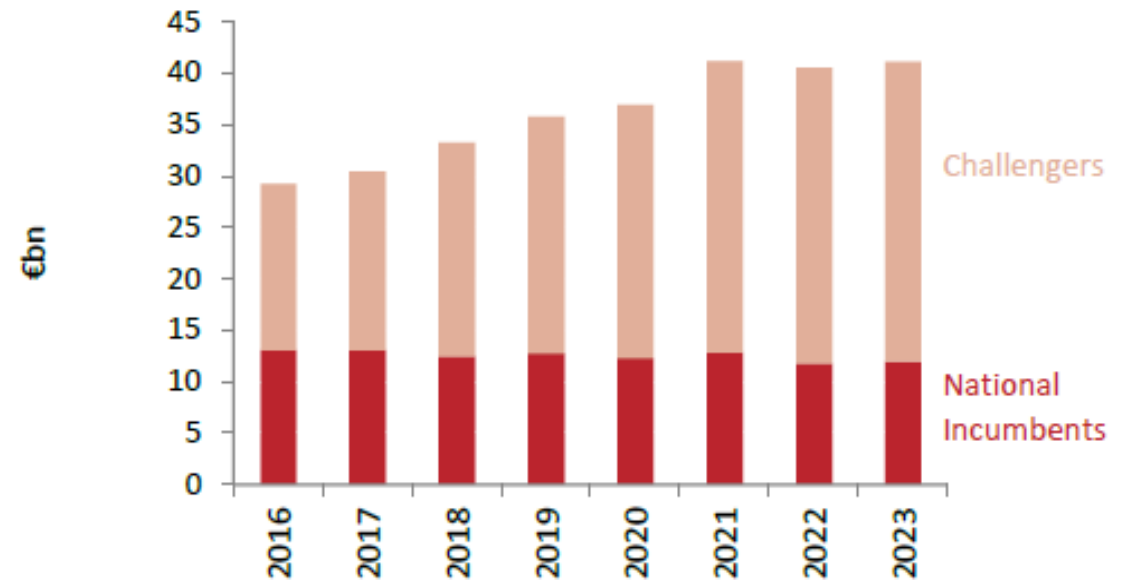
- **USA:** mainly ex-post antitrust
- **Canada:** mixed ex-ante/ex-post
- **Japan:** negotiated access with mediation
- **Korea:** statutory designation of wholesale
- **UK:** EU-style ex-ante
- **Australia:** publicly owned wholesale provider (NBN) with retail competition
- **China:** state-directed infrastructure and administratively licensed access

Financial indicators

- European operators are overall **financially healthy**. In general, they feature:
 - profitable investments (ROCE>WACC)
 - stable profit margins (EBITDA)
 - peaking investments (capex)
 - declining costs (opex)
 - more cash available (FCF)
 - positive investor and credit prospects as fibre and 5G rollouts mature (shareholder returns; credit ratings)

- Challengers are major investors in key markets: total capex by operator type:

Total telecom Capital expenditure for four EU countries, in absolute terms



Source: Total Capex in the Spanish, German, Italian and French markets, (Felten et al. 2025)

Public consultation

Deadline to submit the contributions
8 May 2026



BEREC responses to the European Commission's Digital Fitness Check & Digital Omnibus

with a focus on cloud-related provisions under the Data Act

Digital Markets Working Group

Chiara Caccinelli (Arcep), Margarida Melo Santos (ANACOM)

Context

- On 19 November 2025 the EC presented its **Digital Omnibus proposal**, aimed at **simplifying** existing EU digital rules and launched **a Digital Fitness Check**, with a view of exploring the **interplay** among digital regulations and **potential gaps** in their implementation
- The **DA is a novel regulatory instrument**, which horizontally targets a variety of different stakeholders, including both hyperscalers and small national cloud service providers, which are mostly being regulated for the first time by national authorities → a European harmonised implementation is needed
- The draft Digital Omnibus clarifies the governance under the Data Act (DA), **but neither** the European Data Innovation Body (**EDIB**) **nor any other European network is given a role for cloud-related provisions**: Chapter VI (“Switching between data processing services”) and some articles of Chapter VIII (“Interoperability”)

Content of the response 1/3

- According to Art. 37(4)(b) of the Data Act “the competent authority responsible for the application and enforcement of Articles 23 to 31 (i.e. Chapter VI) and Articles 34 and 35 (i.e. part of Chapter VIII) shall have experience in the field of data and electronic communications services.”;
- The majority of BEREC members are either designated or identified as the competent authorities for the implementation of these provisions;
- Since 2024, BEREC has already served as a forum to share and discuss detailed work done by NRAs concerning competitive or technical aspects of the DA cloud-related provisions. Moreover, BEREC has been meeting with relevant cloud stakeholders to gather further knowledge and expertise.

Content of the response 2/3

BEREC proposals concern:

- **Chapter VI DA – Switching between data processing services**, where BEREC could
 - Develop a **common interpretation** of (i) the services for which the cloud switching process should not be charged from 12 January 2027, and of (ii) the additional services that can be charged for by the provider in line with Recital (89) DA;
 - **Assist the EC** in monitoring the reduction and withdrawal of cloud switching charges;
 - Be consulted by the EC before they adopt a delegated act to establish a monitoring mechanism;
 - **Provide technical advice** for the development of standards and the adoption of common specifications under Articles 30 and 35 DA.

Content of the response 3/3

- **Chapter VIII DA – Interoperability**, where BEREC could:
 - Foster a harmonised implementation of Article 34 DA. BEREC could publish **guidelines on data egress charges** that the providers may impose for in-parallel use and how these charges would not exceed the egress costs incurred for the providers;
 - Serve as a **forum for discussion** and cooperation among competent national authorities on potential specifications under Article 35 DA (e.g. the degree of openness and accessibility of specifications, ease of implementation for different categories of providers, and analysis of potential risks of lock-in) + if needed, provide useful input for the development of standardisation requests for cloud services (Article 35(4) DA).
- If BEREC is designated, a **coordination mechanism with EDIB** will be needed

Expected benefits

- Avoid the fragmented implementation of a novel European regulatory framework targeting cloud services which are mostly being regulated for the first time + *de facto* support NRAs with limited resources thanks to common pool of knowledge;
- Contribute to a more streamlined and efficient interplay between the DA and other EU digital regulatory frameworks, such as the DNA and the DMA ;
- Ensure an early identification of emerging cloud market practices, thanks to data-driven regulation, and the sharing, at the EU level, of national experience/expertise;
- Ensure regulatory convergence through non-binding tools;
- Serve as a contact point for stakeholders at the European level (e.g. providers, customers of cloud services, civil society);
- Avoid duplication of (public) resources across Europe, thanks to a shared work of common interpretation and implementation of the DA.

BEREC updates

BEREC Chair
Marko Mismas (AKOS)

Development of BEREC's position on the Digital Networks Act proposal



BEREC at Mobile World Congress

- GSMA- BEREC roundtable
- Bilateral meetings with stakeholders



BEREC workshop on migration and copper switch-off in light of the DNA

- 17 March 2026, hybrid
- **Discussion topics:**
 - ✓ how to preserve the competitive dynamics of the market during and after switch-off;
 - ✓ the challenges arising from different categories of end users;
 - ✓ first impression about the DNA proposal regarding the rules related to copper switch-off;
 - ✓ EC's presentation of the DNA proposal.



Do not miss out!

- **21 May 2026** - workshop on combating fraud and collection of information from the stakeholders
- **Date to be announced (Q2 2026)** - workshop on practices ensuring equivalence of access and choice with respect to the accessibility

#empowering
EUconnectivity

14th BEREC Stakeholder Forum

Maison de la Poste, Brussels
31 March 2026

09:00 – 12:40 **Meet & Greet sessions** with BEREC Working Group
Co-Chairs

14:00 – 17:30 **Conference**

- BEREC Work Programme 2027
- Panel discussion *Crafting Europe's Next Digital Framework*
- Keynote address Erzsebet Fitori, Smart Networks and Services
Joint Network Undertaking
- Panel discussion *When Networks Sense, Connect and
Transcend*
- Keynote address Henna Virkkunen, European Commission

17:30 – 19:00 **Networking reception**



Public consultations

Document title	Deadline
Early Call for Inputs on the BEREC Work Programme 2027	15 April 2026
Draft BEREC Retail Roaming Guidelines	17 April 2026
Draft BEREC Wholesale Roaming Guidelines	17 April 2026
Draft BEREC Report on Virtual Worlds and Web 4.0	20 April 2026
Europe's Telecom Reality Check: Draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions	8 May 2026

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