

Public debriefing

7 October 2026

Outcomes of the 68th BEREC ordinary plenary meetings

Programme

- Draft BEREC Work Programme 2027
- Draft BEREC Report on the impact of generative AI on internet openness

Q&A session

- Draft BEREC Report on access conditions to state-aid funded networks
- BEREC Fact-Finding Report on the competition indicators and regulatory highlights in different jurisdictions
- BEREC Statement on the Review of the BEREC Guidelines detailing Quality of Service parameters
- BEREC updates

Q&A session



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Draft BEREC Work Programme 2027

Incoming BEREC Chair
Alejandra de Iturriaga (CNMC)

Steps leading to the public consultation



Contributions to the Draft BEREC WP2027

Following **regulation** and criteria of **transparency** and **inclusivity**

- BEREC Working Groups
- NRAs
- EU institutions
- Stakeholders

Guiding principles

- WP in accordance with BEREC Regulation and Strategy 2026 – 2030
- Aim: organise and prioritise its work towards clearly defined objectives
- WP structured around the high-level **strategic 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

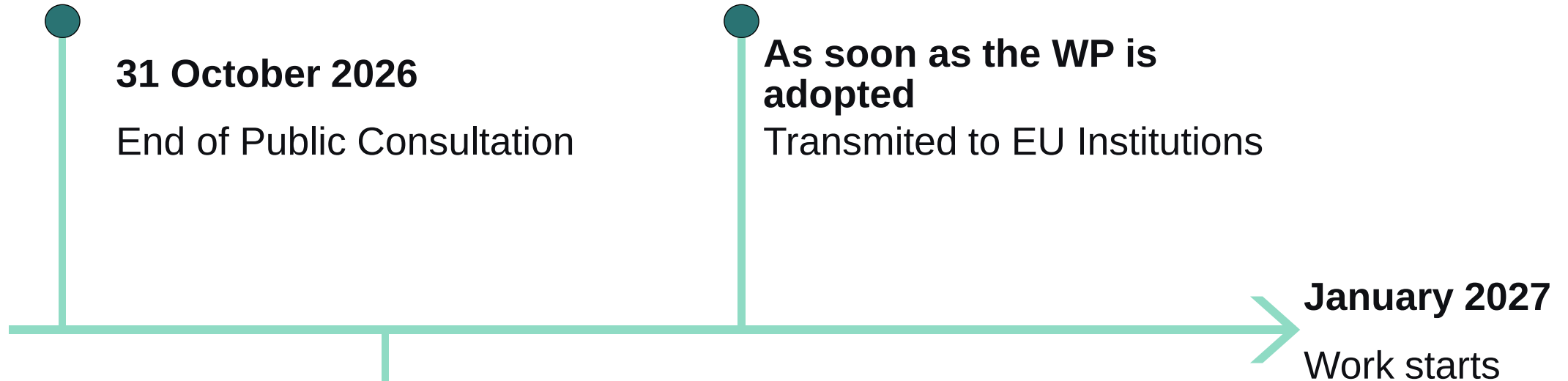
Types of projects in WP2027

- The sectoral regulation in force envisages **mandatory** tasks for BEREC
- The BEREC work programme follows a multiannual approach meaning that some projects started in 2026 will be completed in 2027 and are, therefore, **carry overs**
- Additionally, there are **recurring** items
- BEREC **international and institutional commitments**
- **Proposals** put forward by BEREC members and stakeholders

Considerations guiding the WP2027

- The Work Programme takes into consideration the market, technical and policy developments identified in BEREC Strategy
- For 2027 has been developed against the backdrop of the ongoing review of the regulatory framework:
 - **(DNA)** Published in January 2026
 - Support and advice to the EC for the review of the functioning of the **roaming and of the intra-EU communications regulation**, due by end of June 2027
 - BEREC will also consider the review of the Digital Decade Policy Program. **Digital Fitness Check**

Next Steps



Link/Email to Public Consultation

berec.europa.eu  Public Consultations

BEREC-WP2027@DISTRO.BEREC.EUROPA.EU

Draft BEREC Report on the impact of generative AI on internet openness

Digital Markets Working Group
Chiara Caccinelli (Arcep), Margarida Melo Santos (ANACOM)

Context

- In the last years, BEREC published **several deliverables** on
 - AI and related topics
 - How users' internet experience is affected by the different elements of the internet ecosystem in terms of competition and internet openness
- While enriching user experience and complementing traditional methods of accessing online content and services, **generative AI can also affect the overall user experience** on the internet as it has the potential to directly influence the way users access online content/services and possibly their freedom of choice
- This report focuses on **the impact of generative AI on internet openness**, understood as the ability of users to access and distribute information, content and services online without unlawful interference or discrimination, and the ability to innovate

Key take-aways 1/2

- Generative AI is creating a new layer of intermediation within the internet ecosystem, and a new gateway through which users access information, products and services → this can generate significant efficiencies but also concentrate decision-making power within a limited number of private actors, and raise questions regarding transparency and users' freedom of choice
- The AI ecosystem is characterised by strong structural dependencies between model developers, infrastructure/cloud providers. Key infrastructure, distribution layers downstream applications and the AI agents sector are highly concentrated
- Technical protocols are likely to play an increasingly important role in shaping the future AI ecosystem although they present some limitations: Model Context Protocol (MCP), WebMCP, robots.txt are analysed

Key take-aways 2/2

- Generative AI changes the relationship between users and online content by generating synthesised answers rather than directing users to a range of sources
- As a result, AI-generated answers can reduce traffic to original websites and concentrate attention on a relatively small number of sources → This may limit source diversity, reduce transparency regarding how information is selected and prioritised, and increase users' reliance on AI-mediated representations of information
- Growing tension between generative AI and the sustainability of the production of online content → structural paradox: AI systems depend on the continued production of high-quality content while simultaneously weakening some of the economic incentives that support its creation and dissemination
- Regulatory frameworks: no single regulatory instrument can fully address the broader implications of generative AI for internet openness, but several EU frameworks can tackle some of the challenges → effective coordination and enforcement will be key

Public consultation

- The draft report will be opened to public consultation from 7 October until 11 November 2026 (5 weeks)
- Early 2027: publication of the final report and of the public consultation report

Draft BEREC Report on access conditions to state-aid funded networks

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

Overview

➤ Motivation

- Public funding, particularly through the Recovery and Resilience Facility, has significantly supported the deployment of FTTB/FTTH networks across Europe
- Ensuring wholesale access under fair and non-discriminatory conditions promotes sustainable competition and efficient use of public resources

➤ Data collection

- Dedicated questionnaire, focused on **NRAs input to the regulation of wholesale access services in State aid funded networks** -> mainly access obligations and pricing conditions (including dedicated pricing methodologies)
- But also **implementation practices** and **monitoring mechanisms**

➤ Report

- The report presents an overview of the responses received, with the aim *to improve future NRAs' interventions and harmonize approaches in Europe.*

State aid schemes, NRAs' involvement and transparency

- **22 NRAs** confirmed involvement in State aid schemes and provided supporting documentation/links describing their national cases
- Public investments are generally directed towards the rollout of **FTTH/FTTB networks in market failure areas**; minimum speed thresholds reached 1 Gbps in the majority of programmes approved from 2022 onwards
- NRAs' involvement is primarily concentrated in:
 - the determination of targeted areas
 - assessment of wholesale access conditions and
 - dispute resolution
- **14 NRAs** reported online repositories for the identification of State aided premises

Wholesale access offers & regulated conditions

➤ Access services

- wide diversity of access products mandated, ranging from comprehensive to limited or passive-only. Sometimes, custom national obligations are imposed
- obligations normally applicable uniformly to all beneficiaries

➤ Pricing

- pricing relies on SMP regulation, competitive benchmarking, cost-orientation or ERT (used by 5 countries)

➤ Reference offers

- beneficiaries must publish standardized offers (most combine active/passive) to ensure non-discrimination. ~ ½ of the countries require pre-operational publication
- content requirements differ, but nearly all mandate SLAs and SLGs
- compliance oversight varies (ex-ante vs ex-post)

Monitoring and market developments

➤ Monitoring

- ~50% of NRAs monitor access conditions and prices
- price updates are mostly ad-hoc, and ROs updates remain reactive
- deregulation of ex-ante regulated markets determines the use transitional mechanisms in State aided networks to avoid price shocks

➤ Market uptake

- active wholesale services see strong demand
- passive duct/pole access shows relatively lower take-up
- key challenges include *area delineation* and *price verification*

➤ Recommendation

- active evaluation of the effectiveness of State Aid Schemes, to the benefit of future interventions

Concluding remarks



The EU State aid regulatory framework establishes clear principles for wholesale access under fair and non-discriminatory conditions, but **implementation varies** across MS.



NRAs play key roles in determining targeted areas, assessing access conditions/prices, and resolving disputes, though the timing of the involvement and its level **differ**.



Active access services generally see greater commercial interest. **Pricing methodologies** rely on regulated prices, benchmarking, cost-orientation or ERT.



Effectiveness of state aid schemes depends on market structure, network architecture and geographic granularity.



Systematic **monitoring** and **published evaluation reports** enhance transparency and understanding.

Public consultation

Deadline to submit the contributions

13 November 2026



Europe's Telecom Reality Check: 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

- Focus on **fixed and mobile broadband services**
- Comparative assessment of the EU-27 + top EU performers, against the situation in other jurisdictions on several continents (USA, Canada, UK, Japan, South Korea, China and Australia)
- Aspects/indicators BEREC analyses:
 - Fixed and mobile coverage and penetration; urban/rural divide
 - Pricing + QoS
 - Telecommunications access regulation highlights
 - Consolidation trends and implications for telecoms
 - Financial indicators outlook
- Based on **verifiable, publicly available** data sources
- **Public consultation**
 - 17 March – 8 May 2026
 - 8 distinct submissions from 10 respondents: AIP & Mynet, Connect Europe/GSMA, ecta, FTTH Council Europe, MVNO Europe, Stratus Novem + 2 private individuals.

Key messages of the report - reminder

- *FTTP coverage & penetration*
- *Fixed BB subscriptions by speeds*
- *5G coverage*
- *Pricing of BB bundles/standalone*
- *Download and upload speeds, latency*
- *Consolidation trends*
- *Access regulation*
- *Financial indicators*

- (comparatively) **Strong EU telecom performance:** with a unique mix of competitive markets, affordable prices, expanding FTTP/5G coverage and resilient operators, with several MS ranking among global leaders
- **High value for money:** EU broadband prices remain lower than in the USA and South Korea, for comparable services. Although download speeds lag, latency is a clear strength, and top EU countries achieve world-class performance.
- **Effective EU regulation:** the harmonized ex-ante framework supports both competition and connectivity, sustaining market diversity and consumer benefits.
- **No case for loosening competition:** overall, operators remain financially healthy (despite important variation in some cases). BEREC finds **no evidence** that greater consolidation or weaker merger controls would improve investment outcomes.

Stakeholder feedback: general views

- **Widespread strong support** for the draft Report from all the stakeholders except CE/GSMA
 - a timely and evidence-based assessment of the status quo of Europe's telecom sector
- **Criticism:** CE/GSMA argued that the draft Report ***understates investment needs and competitive challenges***, presenting an incomplete and overly favorable picture of the EU telecom sector.
 - Most criticism focused on financial indicators (Chapter 7 of the draft Report)

Stakeholder feedback: specifics

- **Benchmarking choices**

- the comparability of the selected jurisdictions and the presentation of top-performing vs. lagging EU MS

- **Data and indicators**

- requests to update datasets and include additional or more granular metrics

- **Coverage and quality metrics**

- calls for more information on operator-level deployment, alternative technologies (e.g. FWA), 5G SA, network availability and advanced QoS indicators

- **Importance of the alternative operators:**

- role of challengers, regional and local operators in shaping investment and competition outcomes

Stakeholder feedback: resolution

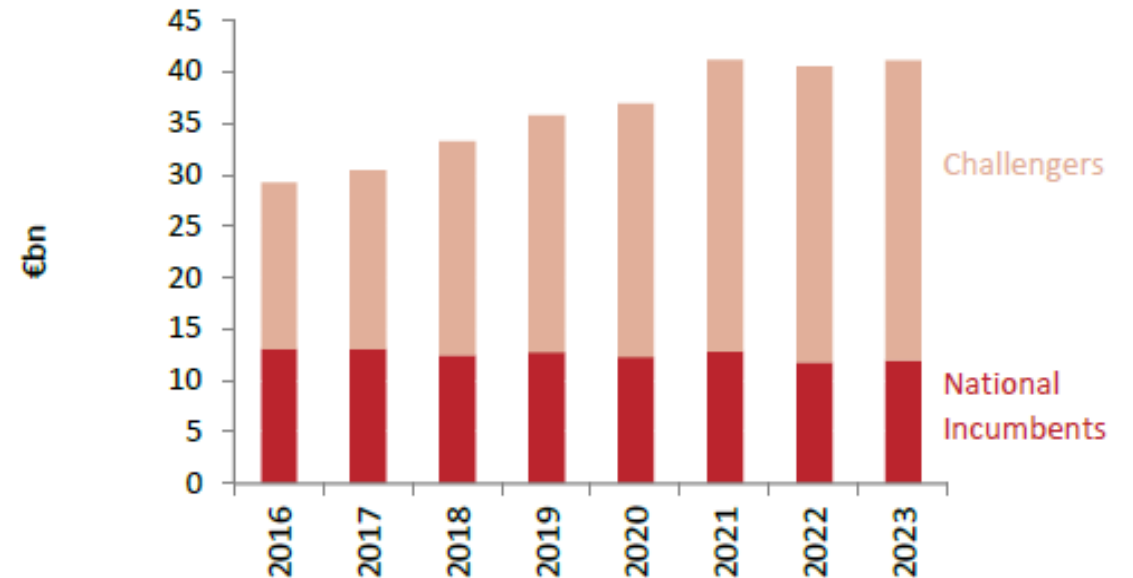
- **Conclusions strengthened** to highlight that operator diversity, different business models and competitive prices are key strengths of the EU telecoms model.
- **Stronger recognition of the EU's regulatory framework functioning**, showing that ex-ante access regulation and competition-based oversight have supported adequately investment and connectivity outcomes.
- **Financial indicators chapter expanded**, with additional explanations and methodological clarifications.
 - Reinforcing BEREC's interpretation of the evidence while leaving the overall conclusions unchanged

Snippet: 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

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

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



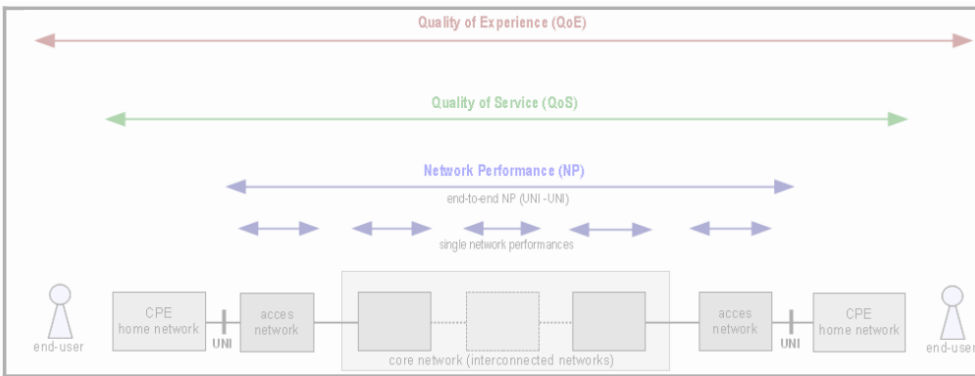
Source: Total Capex in the Spanish, German, Italian and French markets, (Felten et al. 2025)

BEREC Statement on the Review of the BEREC Guidelines detailing Quality of Service parameters

End Users Working Group
Indre Jurgelioniene (RRT), Leonie Allen (ComReg)

01

Context

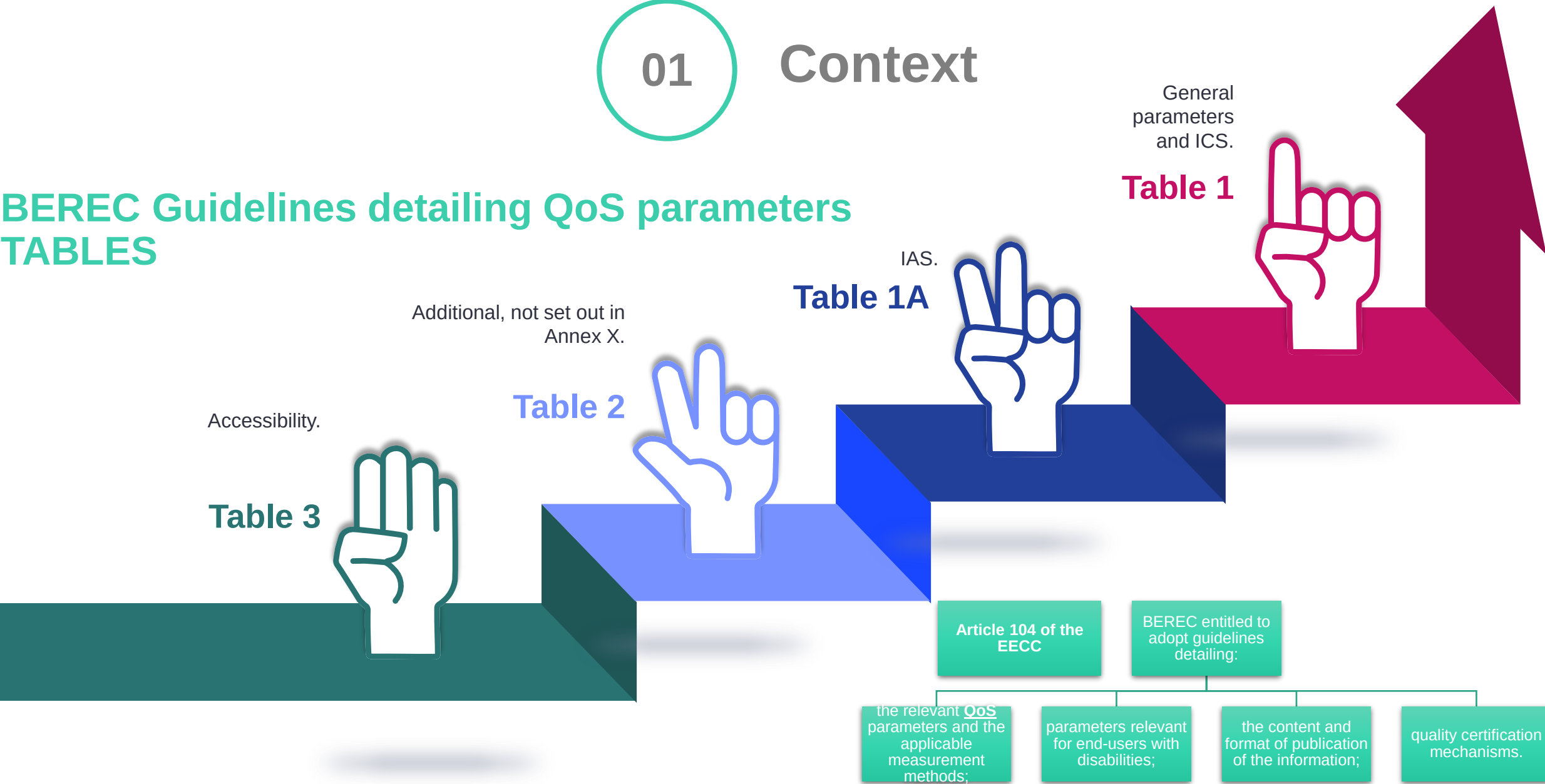


Section 6 of the present Guidelines sets out that a review of these Guidelines will commence 2 years from their adoption and publication in 2024.

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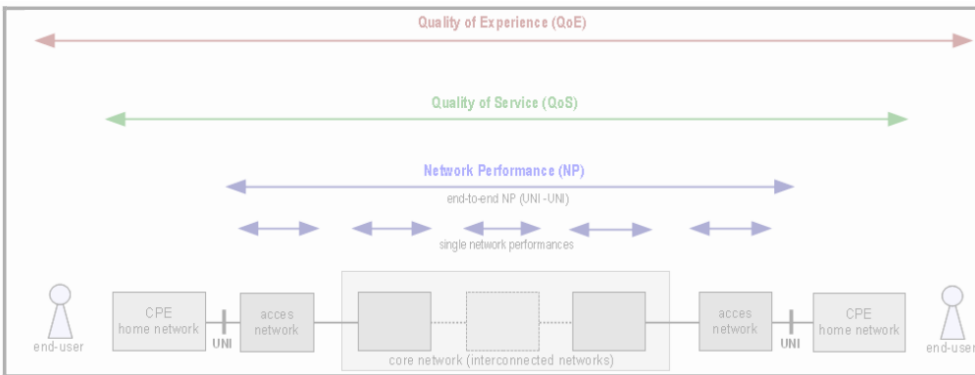
Context

BEREC Guidelines detailing QoS parameters TABLES



02

BEREC Assessment



Current Guidelines remain fit for purpose

The 2024 Guidelines continue to provide a robust and harmonised framework for implementing Article 104 EECC



Legislative framework is evolving

The proposed DNA and implementation of the EAA may affect QoS requirements, scope and accessibility parameters



No need for formal review at this stage

BEREC will continue monitoring market, technological and regulatory developments and reassess the need for an update.

03

BEREC Observation

Observation

No need for a formal review



Possibility

To revisit the decision if such action is required

BEREC updates

BEREC Chair
Marko Mismas (AKOS)

BEREC Chairmanship elections

BEREC Chair 2028

- Michel Van Bellinghen (BIPT, Belgium)



Vice Chairs 2027

- Klaus Steinmaurer (RTR, Austria),
- Karol Krzywicki (UKE, Poland)

Representative of participants without voting rights

- Armer Juka, (AKEP, Albania)



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Memorandum of Understanding with OFCOM (UK)

- Strengthen cooperative, professional and collegial relationships
- Jointly address current and future regulatory challenges
- Facilitate knowledge and experience sharing on regulatory matters



BoR adopted documents

- Report on Virtual Worlds and Web 4.0
- Report on the outcome of the consultation on the BEREC Draft Report on Virtual Worlds and Web 4.0
- Report on the Implementation of the Open Internet Regulation and the BEREC Open Internet Guidelines
- Report on the outcome of the public consultation of the draft BEREC Fact finding report on connectivity, competition and regulatory highlights in different jurisdictions
- Summary Report on the external workshop on practices for ensuring the equivalence of access and choice with respect to accessibility
- Summary Report on the BEREC Stakeholder Workshop on Combating Fraud

BEREC public events

16 September 2026

Workshop on understanding digital technologies' sufficiency for greener networks and ICTs

Upcoming events

26 - 30 October 2026 Study trip to Japan

24 November 2026 External workshop on implementation of Equivalence of Inputs by NRAs

24 February 2027 15th BEREC Stakeholder Forum, Maison de La Poste, Brussels



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Public consultations

Document title	Deadline
Draft BEREC Work Programme	31 October 2026
BEREC Call for Input on the review of the regulatory framework for regulated intra-EU communications	6 November 2026
Draft BEREC Report on the impact of generative AI on internet openness	11 November 2026
Draft BEREC Report on access conditions to state-aid funded networks	13 November 2026

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