

Public debriefing

Outcomes of the 60th BEREC ordinary plenary meetings
3-4 October 2024

9 October 2024

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Public debriefing

First part

- Draft BEREC Work Programme 2025
- Draft Report on the evolution of private and public 5G networks in Europe

Q&A session

Second part

- Implementation Report on the BEREC Guidelines on Geographical surveys of network deployments
- BEREC updates

Q&A session



Draft BEREC Work Programme 2025

Incoming BEREC Chair 2025
Robert Mourik (ComReg)

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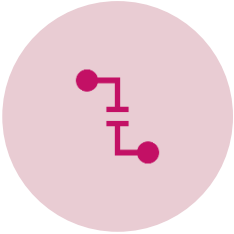
Structure of the WP

- Same structure as WP 2024
- Work items divided among three strategic priorities (in accordance with BEREC Strategy 2021-2025)
 - SP1: Promoting Full Connectivity
 - SP2: Promoting Sustainable and Open Digital Markets
 - SP3: Empowering End Users
 - Stemming from BEREC's other tasks
 - Roaming, WACC parameters, Input to review of the EECC, Review of BEREC's strategy, etc.
 - Cooperation with other institutions and Stakeholder engagement chapters
 - Future work
- **50 work items: 32 mandatory/recurring/carry-overs, 18 own initiative after prioritization exercise**
- Additional work items for BEREC Chair/Incoming Chair (Stakeholder Forum 2024, Outline WP 2025, Communication Plan 2024, Annual Reports)

Number of Projects by Strategic Priority



Strategic priorities



PROMOTING FULL CONNECTIVITY – 16

UPDATE TO GUIDELINES ON VHCN

2 X GUIDELINES UNDER GIA

WORKSHOPS ON COMPETITIVE EFFECTS OF STRATEGIC FIBRE NETWORKS DEPLOYMENT

OPINION ON THE EC'S REVIEW OF THE RECOMMENDATION ON RELEVANT MARKETS



THRIVING SUSTAINABLE AND OPEN DIGITAL MARKETS – 14

CONTRIBUTION TO THE IMPLEMENTATION OF THE DMA (AI SUB-GROUP)

EXTERNAL WORKSHOP ON IMPLEMENTATION EOI BY NRAS

CONTRIBUTING TO FUTURE CODE OF CONDUCT ON ECN/ECS SUSTAINABILITY

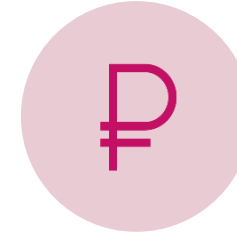


EMPOWERING END USERS - 7

BEREC OPINION ON THE REVIEW OF UNIVERSAL SERVICES

BEREC REPORT ON SWITCHING AND TERMINATION OF CONTRACTS

ECASEC-BEREC: GUIDELINES ON PREVENTING SMISHING



BEREC'S OTHER TASKS – 13

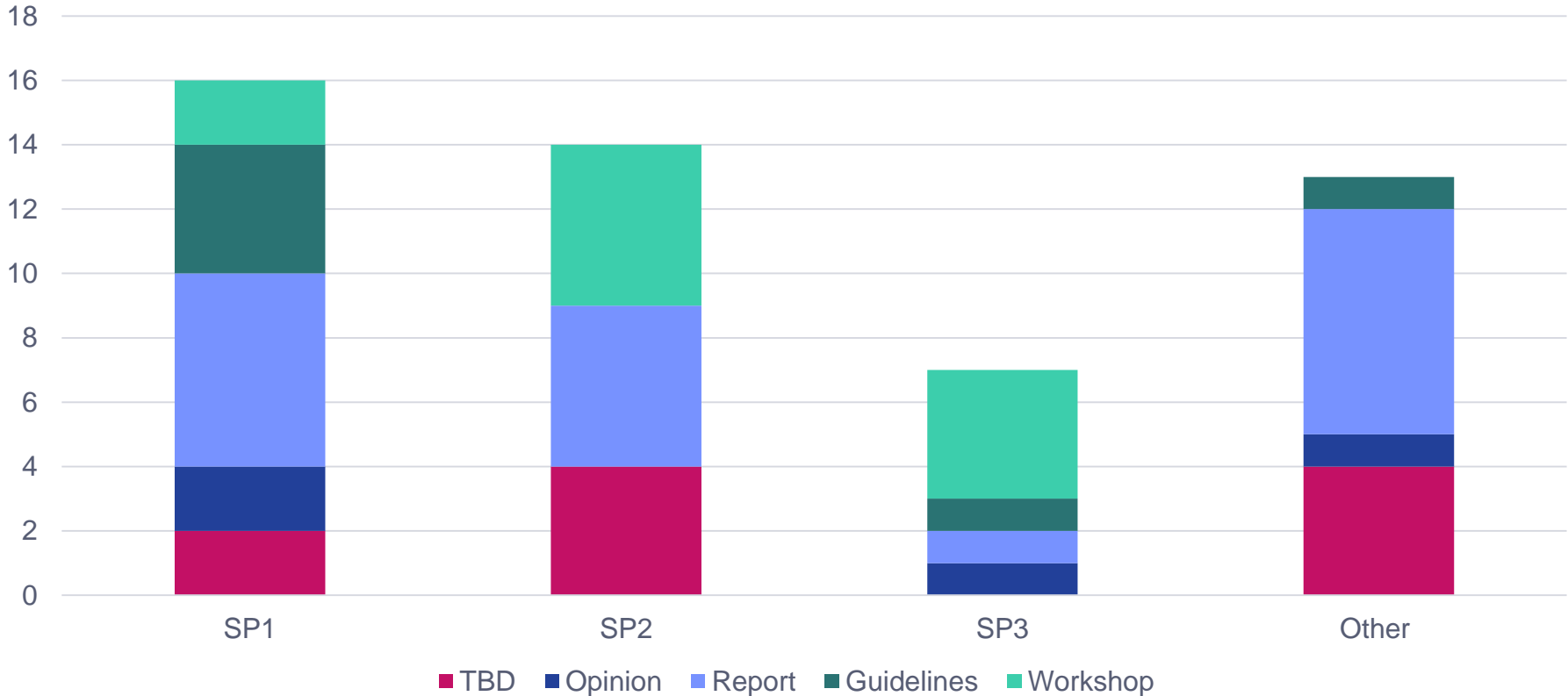
BEREC OPINION ABOUT THE FUNCTIONING OF THE ROAMING REGULATION

•BEREC STRATEGIES 2026-2030: MID-TERM STRATEGY, INTERNATIONAL AND INSTITUTIONAL

AD HOC INPUT TO EU/NRAS

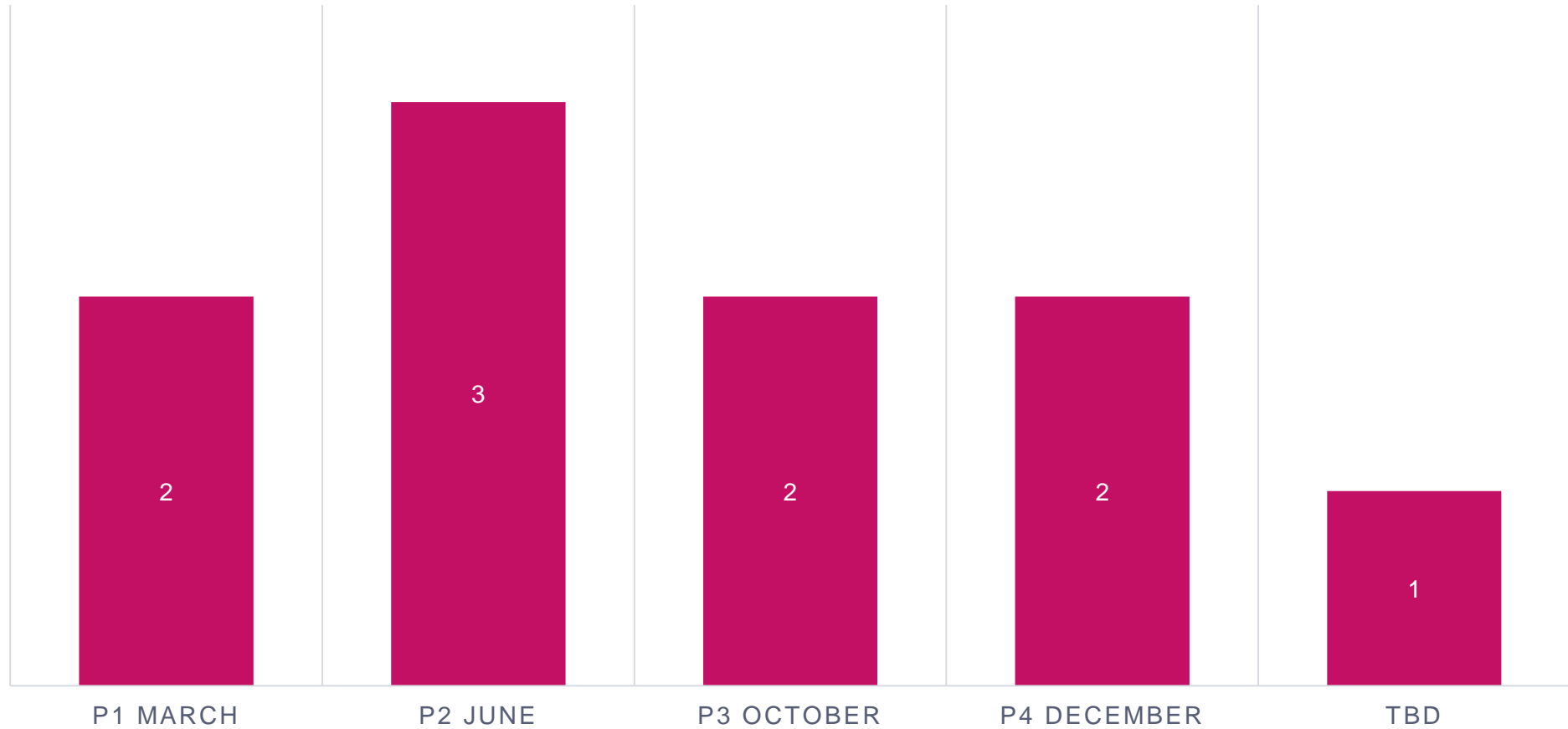
Current Situation – 50 projects by type e.g. report, int, workshop, opinion, Guidelines, tbc

Output Type by Strategic Priority



Public Consultations 2025

DISTRIBUTION OF PUBLIC CONSULTATIONS



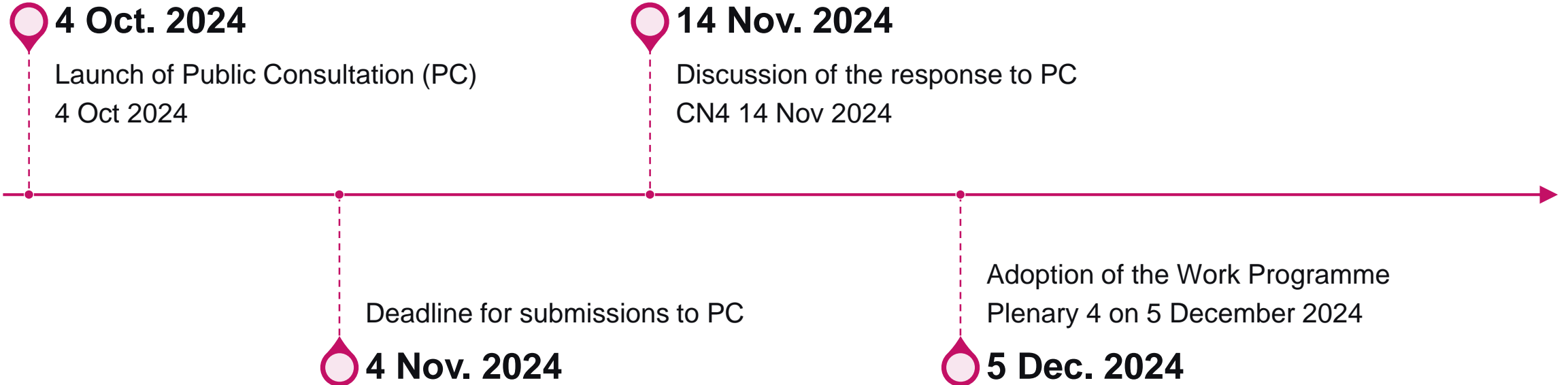
Workload per Plenary 2025

Plenary	Documents for PC	Final Documents	Workshop Summary Reports	TOTAL
P1 – March	2	4	1	7
P2 – June	3	5	1	9
P3 – October	2	5	4	10
P4 - December	2	7	4	13

Main messages

- Heavy workload – 50 projects is comparable number of deliverables as in 2024 (and 2023)
- BEREC following several projects – DMA HLG AI sub-group, Subsea cables, where the output is not determined
- There are a significant number of mandatory projects, where BEREC's input is required
 - BEREC Guidelines on the coordination of civil works according to Art. 5(6) of the GIA
 - BEREC Guidelines on access to in-building physical infrastructure according to Article 11(6) of the GIA
 - BEREC Input to European Commission's Guidance on Article 3 of the Gigabit Infrastructure Act
 - BEREC Opinion on the review of European Commission's Recommendation on relevant markets susceptible to ex-ante regulation
 - BEREC Opinion on the review of Universal Services
 - BEREC Opinion about the functioning of the Roaming Regulation
 - ECASEC-BEREC: Guidelines on preventing smishing
- Unclear the extent of BEREC ad hoc input required for review of the EECC – some spare capacity required

What Comes Next?



Draft BEREC Report on the evolution of private and public 5G networks in Europe

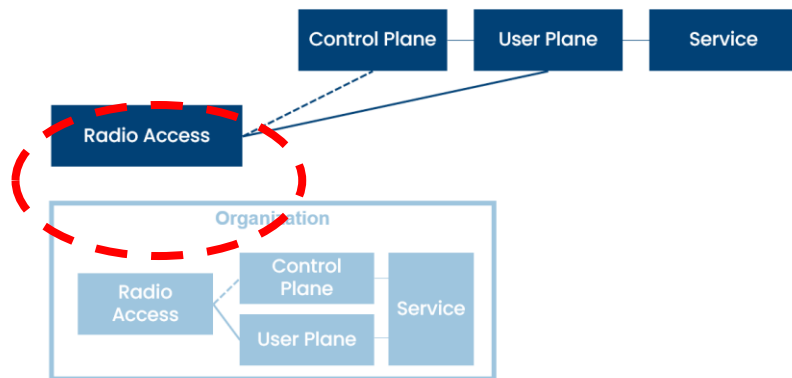
**Wireless Network Evolution Working Group
Joe Lynch (ComReg) and Sietse van der Gaast (ACM)**

Contents, context, consultation!

- What is a 5G private network?
- Background and basis for the report
- Numbering issues for consultation
- Drivers and uses cases for consultation
- Interplay with cloudification and other developments
- Have your say, until 29 November 2025

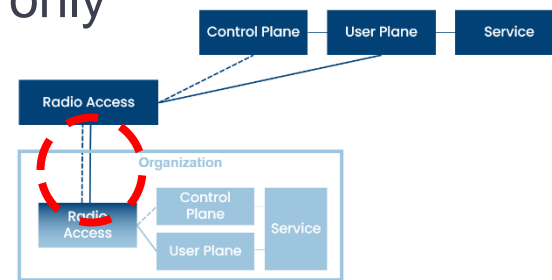
Architectures and flavours (categorisation in theory)

- Standalone private network (isolated deployment)

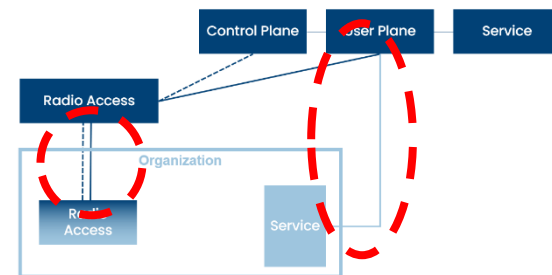


- Private network in conjunction with public network

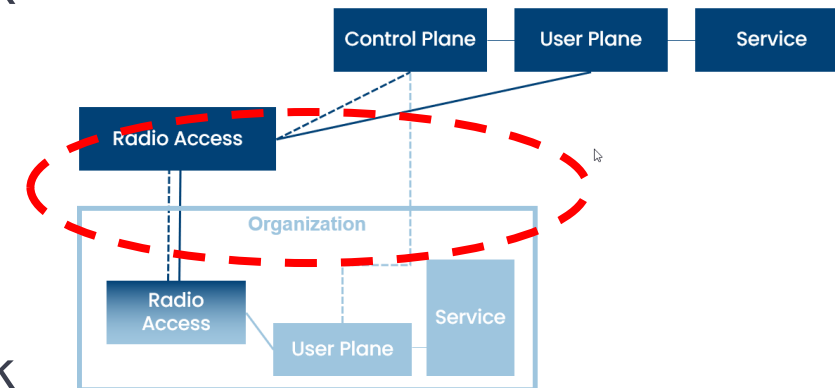
- share radio access network only



- share radio access network + control plane



- Private network hosted by the public network



Most countries have frameworks for private mobile networks, but they differ

YES *	23																						
	AT	BE	CH	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LU	LV	ME	MT	NL	NO	SE	SI
NO	8																						
	BG	CY	LT	MK	PL	PT	RS	UA															

* Includes indicated future plans by IE, LU, ME and MT.

- Different definitions are used to separate ‘private’ from ‘public’
 - Such as ‘plot’ or ‘geographical area’ based
 - Different conditions with regard to interworking with public networks, roaming, providing services to third parties (such as tenants) etc.
- Different assignment, payment schemes, frequency ranges

Have your say until 29 November

There's a strong team of experts ready to process your views in time for a Final Report at Plenary 1 2025

Implementation Report on the **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

- Article 22(1) of the EECC established that NRAs and/or OCAs should conduct a **geographical survey** ('GS') of the reach of electronic communications networks capable of delivering broadband by December 2023. The GS should be sufficiently **granular** and include **quality of service information** ('QoS'). It may also include **forecasts** of the reach of very high capacity networks ('VHCNs'). The GS was meant to facilitate the effective design, implementation and monitoring of broadband policies and related regulation.
- Article 22(7) EECC tasked BEREC with the delivery of Guidelines ('GL') to assist authorities to implement their obligations under Article 22 consistently. **BEREC published three different Guidelines, published as a Handbook (BoR (21) 104) in June 2021.**
- **Paragraph 15 of the Core Guidelines (BoR (20) 42) established that BEREC would prepare an Implementation Report to examine how different European countries (MS and Iceland) had transposed and enabled the Article 22 provisions. Afterwards, BEREC would consider whether to revise and update the Guidelines.**
- The present Report should enable BEREC to judge the usefulness of its GL to conduct the GS and to implement consistently the Article 22 provisions, identify any lessons learnt, detect areas for improvement and, finally, consider whether BEREC should programme an update of its GL in 2025.

The process and the number of NRAs involved

- BEREC has gathered information from **27 public authorities** that are responsible for the conducting the GS.
- The GSs are delivered by the NRAs of 18 MS, OCAs of 4 MS,
 - in 5 MS there is a joint responsibility of an NRA and an OCA.
- According to the information retrieved, 27 MS implement the GS for fixed broadband and 26 for mobile broadband.
- In all MS the GS is carried out at least once a year, and in many cases with higher frequency.
 - According to BEREC information, **in 2019, there were 21 MS with one or more fixed broadband maps and 17 MS with one or more mobile broadband maps**
- The Report follows the structure of the Art. 22 BB mapping GL (next slide)

Structure of the Report

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Main findings (1/2)

- Article 22 and the BEREC GL have resulted in a **substantial increase in the number of MS carrying out the GS and in the granularity of the information included**
- 24 authorities conclude that Article 22 and the **BEREC GL sufficiently empower them to collect the data sets to evaluate the geographical coverage and performance of broadband networks properly**
- Several authorities explain that the BEREC Guidelines have contributed to a **harmonization** of the criteria to map broadband coverage among MS, which results in a **better comparability of national situations** (through common definitions, processes and understandings).

Main findings (2/2)

- However, **MS experience some problems in collecting QoS information** at a sufficiently granular level and expected peak time speed plays out as a specially challenging indicator
 - More could be done to assist authorities regarding QoS indicators in general and for **FWA**.
- Another critical issue from the survey is the **information to characterise mobile networks** as regards the harmonization of the coverage of **5G networks** calculated by the various NRA/OCA. The approaches adopted by the NRA/OCA could be different (e.g. the collections are mostly based on the distinction between 5G **Stand Alone** and 5G **Non-SA**).
- This implementation report has shown **there is room for improvement regarding the approaches to implement the Guidelines to achieve further harmonization and with this increase the comparability across MS.**

Conclusions

In the light of the main evidence resulting from the survey, **BEREC considers it appropriate to propose the update of the BEREC Guidelines on Art. 22 broadband** mapping due to

- Technology developments
- More recent BEREC documents, in particular the VHCN GL
- New EU legislation, in particular the Gigabit Infrastructure Act (GIA)
- A multitude of more recent EU and EC soft law documents such as the Annex I in the EU State Aid Guidelines mapping and measurement of the Digital Decade Key Performance Indicators
- **BEREC will work on the update in close cooperation with the EC which is working on a “Methodology on 5G Mobile and Fixed QoS Coverage Mapping” and the item is included in the WP 2025**

Next steps and timeline

- The Implementation Report was approved at P3/2024 for publication
- Foresee the update of the Art. 22 BB mapping Guidelines as a WP item 2025 to be worked on in the 2025 (bearing in mind the interlinkage with the EC's draft methodology on 5G Mobile and Fixed QoS coverage mapping)
- Following the approval the Report will be published



BEREC updates

BEREC Chair 2024
Tonko Obuljen (HAKOM)

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Outcomes of BEREC Chair elections

BEREC Chair in 2026:

Marko Mišmaš, Director, AKOS, Slovenia

BEREC Vice-chairs in 2025:

- ✓ **Alejandra de Iturriaga Gandini**, Director of Telecommunications and Audiovisual Sector, CNMC, Spain
- ✓ **Daniela Brönstrup**, Vice-President BNetzA, Germany

Representative of participants without voting rights

Liliia Malon, Commissioner, NCEC, Ukraine



Other recent BEREC documents

- BEREC Report on the implementation of the Open Internet Regulation and the BEREC Open Internet Guidelines
- BEREC Report on the outcome of the public consultation on the draft Report on cloud services and edge computing
- BEREC Report on cloud services and edge computing
- BEREC 5th Intra-EU communications Benchmark Report
- BEREC Report on the outcome of the public consultation on the draft BEREC Report on the entry of large content and application providers into the markets for electronic communications networks and services
- BEREC Report on the entry of large content and application providers into the markets for electronic communications networks and services
- Summary report on outcome of workshop on the application of rights of end-users in the EECC
- Summary of external workshop about the usage of satellite technologies in mobile communications
- Assessment of the application of the NRA of Republic of Armenia (PSRC) to join the work of BEREC and BEREC Office
- BoR Decision concerning the application of the NRA of Republic of Armenia (PSRC) to join the work of BEREC and BEREC Office

Upcoming public events

- **19 November 2024** workshop “Security Opportunities and Challenges for Network Resilience”
- **11 December 2024** public debriefing (online)
- **1 April 2025** 13th BEREC Stakeholder Forum in Brussels

Public consultations

Document title	Deadline
Draft BEREC Work Programme 2025	4 November 2024
Draft Report on the evolution of private and public 5G networks in Europe	29 November 2024





Launch of the new BEREC website design

**BEREC Office Director
Verena Weber**

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Features of the new BEREC website

-  Improved and restructured menu
-  Shortcuts and quick-access points to crucial content and functionalities
-  New content – **BEREC's Work** section
-  Enhanced **Documents Search** functionalities
-  Central access point to all **Multimedia** related aspects

...and much more to explore on **berec.europa.eu**

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