

63rd Ordinary Plenary Meeting of the BEREC Board of Regulators (BoR)

Hybrid Meeting

Conclusions

Chair: Robert Mourik

Commissioner of the Commission for Communications
Regulation (ComReg)

5 June 2025

Contents

Main results of the 63 rd Meeting of the BEREC Board of Regulators	3
Introduction and participation	5
List of documents	5
Items discussed	5
1 Opening of the meeting and adoption of the agenda	5
2 List of 'A' items	5
3 Information from the BEREC Chair including information on the election of the BEREC Chair 2027 and Vice-Chairs 2026.....	6
4 Information from the BEREC Office.....	7
5 Information from the European Commission	8
6 Remedies and Market Monitoring (RAMM) – Oral update on the progress regarding Article 22 of BEREC Guidelines on geographic surveys (GS) and the BEREC opinion on the EC's methodology for the mapping of QoS coverage.....	10
7 Market and Economic Analysis (MEA)	12
8 Planning and Future Trends (PFT)	13
8.1 Update on the development of the BEREC Work Programme 2026	13
8.2 BEREC Strategy 2026–2030.....	15
8.3 BEREC International Cooperation.....	16
9 Roaming (ROAM).....	17
10 Cybersecurity and Resilience (CSR) – Oral update on BEREC's ad hoc work to support reinforcing the EU's cybersecurity and resilience capabilities	19
11 Fixed Network Evolution (FNE)	20
11.1 Draft BEREC Guidelines on the coordination of civil works according to Article 5(6) of the Gigabit Infrastructure Act	20
11.2 Draft BEREC Guidelines on access to in-building physical infrastructure according to Article 11(6) of the Gigabit Infrastructure Act	21
12 Sustainability (SUS) – Oral update on the EC's draft Code of Conduct for ECN/ECS	22
13 Summary of the 13 th BEREC Stakeholder Forum.....	23
14 Digital Markets (DM)	24
14.1 Draft BEREC Report on the domestic submarine cables in the different Member States	24
14.2 Oral update on BEREC contributions to the implementation of digital regulations	25
15 Discussion on preparations for future EC workshops	27
16 AOB	35
16.1 Information on the 64 th BoR plenary meeting (2 October 2025, Bulgaria)	35

Annex I – List of final documents

Main results of the 63rd Meeting of the BEREC Board of Regulators

The BEREC Board of Regulators held its 63rd Ordinary Plenary Meeting in hybrid format on 5 June 2025.

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

1. Documents approved as ‘A’ items:

1.1 For publication:

- BoR (25) 64 BEREC Report on WACC parameters 2025
- BoR (25) 65 BEREC Report on the outcome of the public consultation on the draft BEREC Progress Report on managing copper network switch-off
- BoR (25) 66 BEREC Progress Report on managing copper network switch-off
- BoR (25) 67 BEREC Report on the outcome of the public consultation on the draft BEREC Report on Infrastructure-sharing as a lever for ECN/ECS environmental sustainability
- BoR (25) 68 BEREC Report on Infrastructure-sharing as a lever for ECN/ECS environmental sustainability
- BoR (25) 69 BEREC Report on Stock-taking of NRAs’ application of Article 52(2) for wholesale access obligations

2. Documents approved as regular items:

2.1. For publication:

- BoR (25) 63 BEREC BoR Agenda
- BoR (25) 75 BEREC Annual Report 2024
- BoR (25) 76 BEREC Report on the outcome of the public consultation on the Draft BEREC Report on the regulation of physical infrastructure access
- BoR (25) 77 BEREC Report on the regulation of physical infrastructure access
- BoR (25) 81 5th Ukraine Roaming Monitoring Report
- BoR (25) 82 Summary of the BEREC sessions at ENISA Telecom and Digital Infrastructure Security Forum 2025

2.2. For public consultation:

- BoR (25) 80 Draft BEREC Strategy 2026–2030
- BoR (25) 83 Draft BEREC Guidelines on the coordination of civil works according to Article 5(6) of the Gigabit Infrastructure Act
- BoR (25) 84 Draft BEREC Guidelines on access to in-building physical infrastructure according to Article 11(6) of the Gigabit Infrastructure Act
- BoR (25) 85 Draft BEREC Report on the domestic submarine cables in the different Member States

3. Documents submitted for information purposes:

- BoR (25) 70 Schedule for the election of BEREC Chair 2027 and Vice-Chairs 2026
- BoR (25) 71 Contact lists pack
- BoR (25) 72 Information on the planned electronic voting procedures
- BoR (25) 73 Information on the electronic voting procedures since the last plenary meeting
- BoR (25) 74 Work Programme 2025 status update
- BoR (25) 78 List of proposed items for the BEREC WP 2026

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 the BEREC's recent and forthcoming international activities. The BoR was also informed about the development of the BEREC Work Programme 2025. Furthermore, the BoR discussed the upcoming high-level workshop between BEREC and the European Commission to be held in July 2025.

The European Commission was invited to provide information on important recent developments and activities under its remit that have an impact on the electronic communications sector.

5. Next meeting

The next Ordinary Plenary Meeting of the BoR will take place in hybrid format on **2 October 2025 in Bulgaria**.

Introduction and participation

The BEREC Board of Regulators held its 63rd Ordinary Plenary Meeting in hybrid format on 5 June 2025.

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 European Commission also took part in the meeting. Heads and high-level Representatives of the NRAs with whom BEREC has concluded working arrangements were also present.

List of documents

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 I to the Conclusions.

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 (25) 63 Draft BEREC BoR agenda
Introduction by	BEREC Chair (ComReg)
Information presented	The BEREC Chair welcomed the meeting participants and provided practical information on meeting logistics. The BEREC Chair opened the meeting and presented the draft agenda for approval by the BoR. The BoR was invited to suggest any additional issue to be raised or presented under 'Any Other Business' (AOB).
Conclusion	The agenda was approved with no comments.

2 List of 'A' items

Document(s)	BoR (25) 64 Draft BEREC Report on WACC parameters 2025 BoR (25) 65 Draft BEREC Report on the outcome of the public consultation on the draft BEREC Progress Report on managing copper network switch-off BoR (25) 66 Draft BEREC Progress Report on managing copper network switch-off BoR (25) 67 Draft BEREC Report on the outcome of the public consultation on the draft BEREC Report on Infrastructure-sharing as a lever for ECN/ECS environmental sustainability BoR (25) 68 Draft BEREC Report on Infrastructure-sharing as a lever for ECN/ECS environmental sustainability BoR (25) 69 Draft BEREC Report on Stock-taking of NRAs' application of Article 52(2) for wholesale access obligations
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Introduction by	BEREC Chair (ComReg)
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), 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, this item will be withdrawn from the list of 'A' items.
Conclusion	The BoR approved the documents included in the list of 'A' items.

3 Information from the BEREC Chair including information on the election of the BEREC Chair 2027 and Vice-Chairs 2026

Document(s)	BoR (25) 70 Draft Schedule for the election of BEREC Chair 2027 and Vice-Chairs 2026
Introduction by	BEREC Chair (ComReg)
Information presented	<p>The BEREC Chair's main activities were communicated in an email circulated to the BoR for information before the meeting.</p> <p>In particular, he drew attention to the following matters:</p> <ul style="list-style-type: none"> - EC-BoR Workshop & High-Level Task Force (HLTF): The EC-BEREC workshop on 31 March led to the establishment of a High-Level Task Force (HLTF) and its constituent sub-groups. The EC will organise two further workshops on the topics of governance in the morning of 15 July 2025 and on access in September. - The annual Mini Board study trip: The study trip is postponed, and alternative destinations and dates are under consideration. - New PFT Co-Chair: Welcome to Katia Marcantonio (AGCOM) voted in as the new Co-Chair for the PFT Working Group. - Commission review of merger guidelines: The BoR adopted a PRD and completed a call for resources to provide for a BEREC response to two sections of this specialised consultation. Thanks to the Co-Chairs of the MEA WG for drafting the PRD proposal. The deadline for submission of responses is 3 September 2025. - Exchange with ITRE Committee: On 25 February 2025, the ITRE Committee of the EU Parliament published a report on European technological sovereignty and digital infrastructure. The OI Co-Chairs subsequently drew the Chair's Teams' attention to one of the amendments (No 353) to the report, making reference to 'fair share'. After consultation with the Mini Board, it was broadly agreed that BEREC should contact MEPs on the ITRE Committee to inform them of BEREC publications on this topic. The idea was to inform the MEPs through a short paper containing key texts and supporting links to previously published documents. The CN Chair circulated the correspondence sent to the MEPs after the CN meeting in Lisbon. The Co-Chairs of the OI WG had a meeting with a Parliamentary Assistant to one of the MEP (Ms Elena Sancho Murillo MEP), who

	<p>wished to discuss BEREC's position in more detail. The BoR will be kept updated on any further engagement on this topic with the EP.</p> <ul style="list-style-type: none"> - Update to BEREC Guidelines on Geographical surveys of network deployments and the EC consultation on '2nd draft methodology for the mapping of QoS of 5G networks': An update on this project will be provided by the RAMM Co-Chairs under agenda item 6. - Commission review of its recommendation on relevant markets: BEREC will deal with this later this year, after the workshop on access in September. BEREC will be asked to provide an opinion on the Draft Recommendation on Relevant Markets as part of the legislative package in December. <p>The BEREC Chair also informed the BoR about the schedule for the election of BEREC Chair 2027 and Vice-Chairs 2026.</p>
Conclusion	The BoR took note of the information.

4 Information from the BEREC Office

Document(s)	<p>BoR (25) 71 Contact lists pack</p> <p>BoR (25) 72 Information on the planned electronic voting procedures</p> <p>BoR (25) 73 Information on the electronic voting procedures since the last plenary meeting</p> <p>BoR (25) 74 Work Programme 2025 status update</p> <p>BoR (25) 75 Draft BEREC Annual Report 2024</p>
Introduction by	BEREC Office Representative
Information presented	<p>The BEREC Office submitted to the BoR information on the updated contact lists for the BEREC Heads, CN members and the BEREC Office, information about recent and planned electronic voting procedures, and the implementation status of the 2025 BEREC Work Programme (WP-2025).</p> <p>The BEREC Office representative updated the BoR on:</p> <ul style="list-style-type: none"> - Progress with the WP-2025; - Statistics on the meetings held in Q1 2025; - The BEREC Study on the Data Centres (DC): The price of the study amounts to EUR 77,500 and the final deliverable is to be adopted at Plenary 4 2025; - Ongoing training for junior experts: It was noted that the number of people present at each session is decreasing; - WG Co-Chairs training: This has been completed, but there is uncertainty on whether the training will be organised again next year due to the very low participation; - The timeline for submission of the BEREC Annual Report 2024 to the EC; - The ICT ENG questionnaire on messaging applications and corporate mobile devices within the BEREC community: The deadline for NRAs to submit their feedback is 10 June 2025;

	- New call for an SNE reserve list for the Programme Management Unit: This will be launched in June 2025.
Conclusion	The BoR took note of the information and approved the BEREC Annual Report 2024 for publication.

5 Information from the European Commission

Document(s)	No documents
Introduction by	European Commission Representative
Information presented	<p>The European Commission (EC) Representative informed the BoR about the European Commission's main activities in the field of electronic communications and other relevant activities since the last plenary meetings. The Commission's main activities were described in the paper circulated to the BoR for information before the meeting.</p> <p>The EC representative reported that the extension of Roam Like at Home (RLAH) to Ukraine and Moldova is progressing well. Ukraine has completed the necessary legislative steps, and the Commission will soon present a decision for including Ukraine in the EU Roam Like at Home area, which will probably enter into force on 1 January 2026 if all goes as planned. Moldova has adopted primary laws and secondary legislation, and the EC is evaluating this. The final decision for Moldova to enter might be made by the Danish Presidency.</p> <p>The EC representative reported that the Digital Decade Policy Programme (DDPP) is being actively monitored. A public consultation on the methodology for calculating the quality of service of 5G connectivity has been launched, and the next report on the State of Digital Decade will be presented at the Digital Summit in Poland on 17–18 June.</p> <p>The EC representative reported that the Digital Networks Act is being developed to simplify and harmonise the legal framework. An impact assessment is being carried out, and a Call for Evidence will be published soon to inform the public and stakeholders about the Commission's initiative and to seek their feedback. The EC will organise an exchange with BEREC to explain the approach and provide an update on the studies, mainly on the process. The EC representative also informed the BoR about the workshop with BEREC to be held on 15 July, focusing on governance. The Commission will also hold a workshop with the RSPG on the upcoming Digital Networks Act, in a similar format to the one that took place with BEREC. The workshop is scheduled for 16 June. The EC representative also informed the BoR about the second round of stakeholder interviews/questionnaires, carried out by EC consultants, which is planned for June 2025. She asked the NRA for close collaboration with the contractors.</p> <p>She also informed the BoR about the Council meeting of 6 June. It is planned to adopt Council conclusions concerning resilience and critical infrastructure. A special debate on the future of satellites in the context of the future framework is also planned. The EC will give an update on the internal market treatment for roaming concerning Ukraine and Moldova.</p> <p>The EC representative reported that on 16 May 2025, a meeting of the COCOM was dedicated to the review of the EU licensing framework for the 2 GHz Mobile Satellite Services (MSS) band. Current licences for some operators are set to expire in May 2027. The European Commission proposed to launch a 30-day consultation to gather concrete information</p>

	<p>about actual market demand, focusing on mature and credible projects, including the plans of current licensees.</p> <p>She also informed the BoR that on 28 May 2025, the Commission launched a 30-day public consultation on the second draft of the methodology for calculating the quality of service of 5G connectivity. The Commission is considering using this methodology to calculate a new KPI measuring the quality of 5G services, aimed at improving the monitoring of the connectivity targets of the Digital Decade.</p>
Conclusion	The BoR took note of the information.

6 Remedies and Market Monitoring (RAMM) – Oral update on the progress regarding Article 22 of BEREC Guidelines on geographic surveys (GS) and the BEREC opinion on the EC’s methodology for the mapping of QoS coverage

Document(s)	No documents
Introduction by	RAMM WG Co-Chairs (BNetzA/AGCOM)
Information presented	<p>The RAMM WG Co-Chairs first informed the BoR that the approval of Article 22 of BEREC’s Guidelines on geographic surveys for public consultation would be moved to P4. This decision was made to ensure consistency with the updated VHCN guidelines that the FNE WG is preparing, which have also been postponed to P4. As Article 22 relates to both mobile and all fixed coverage, and the EC is currently developing the methodology for mapping 5G QoS, the RAMM WG needs to update both the Guidelines and the Opinion.</p> <p>Secondly, the Co-Chairs briefed the BoR on the most recent RAMM WG work done in this regard. Given the large number of contributors involved in updating Article 22, the main discussion primarily focused on the application of definitions and the varying interpretations among NRAs. The RAMM Working Group emphasised its guiding principle: updates should be made only when necessary and be proportionate to the effort required, with a strong emphasis on maintaining comparability of results across NRAs. Three key examples of definitional discussions were highlighted, namely fixed wired networks, FWA coverage and mobile coverage.</p> <p>Furthermore, the Co-Chairs illustrated the status of the EC consultation on QoS. On 28 May 2025, the EC launched a stakeholder consultation on the second draft of its methodology for mapping the QoS of 5G networks. Open until 27 June 2025, the consultation invites feedback through a structured questionnaire and a review of the draft methodology. While primarily targeting MNOs, NRAs, BEREC and spectrum planning tool providers, the consultation is also open to broader stakeholders, including consumer associations and the general public. The methodology reflects concerns raised by NRAs involved in small-scale trials and by BEREC in its December 2024 opinion. A follow-up online meeting is scheduled for 16 June to clarify stakeholder queries, with the aim of refining the methodology ahead of a large-scale test planned for Q4 2025.</p> <p>In conclusion, the Co-Chairs asked the BoR to express their preferences on how BEREC should contribute to this consultation. Options include submitting a comprehensive BEREC Opinion via an electronic procedure or providing technical remarks at the expert level without BoR approval, as done in previous cases. Regardless of the chosen path, BEREC will seek</p>

	BoR guidance on the preferred option. Additionally, cost implications for NRAs participating in the large-scale test will be discussed with the EC following the consultation phase.
Conclusion	The BoR took note of the information.

7 Market and Economic Analysis (MEA)

Document(s)	<p>BoR (25) 76 Draft BEREC Report on the outcome of the public consultation on the Draft BEREC Report on the regulation of physical infrastructure access</p> <p>BoR (25) 77 Draft BEREC Report on the regulation of physical infrastructure access</p>
Introduction by	MEA WG Co-Chairs (ANCOM/CNMC)
Information presented	<p>The Co-Chairs began the presentation by underscoring the growing importance of PIA in the deployment of VHCNs across Europe. They highlighted the increasing number of countries regulating a standalone PIA market and the upward trend observed in this area. As the most upstream segment in the electronic communications value chain, PIA plays a pivotal role in shaping all related markets. This initiative was further driven by enhanced importance of PIA embedded in the legal frameworks, including the EECC, the Broadband Cost Reduction Directive (BCRD) and, more recently, the Gigabit Infrastructure Act (GIA), as well as the rising significance of non-telecom infrastructure in network rollouts. The report's findings were based on data collected from 29 NRAs through a detailed questionnaire, complemented by input from 13 stakeholders, including major telecom operators and industry associations.</p> <p>Secondly, the Co-Chairs presented the results of the public consultation. Stakeholders generally responded positively, commending the report's comprehensive and detailed analysis. However, many comments were either referring to specific national contexts or addressed issues outside BEREC's mandate, falling under the jurisdiction of individual NRAs. Broader feedback called for a more ambitious and critical approach, with clearer, actionable recommendations and a more structured categorisation of regulatory approaches. Stakeholders also emphasised the need to distinguish more clearly between asymmetric and symmetric regulatory approaches and raised caution in interpreting the data due to varying response rates. Key topics of debate included access to non-telecom infrastructure, additional market statistics and PIA pricing.</p> <p>In response to this feedback, BEREC introduced several revisions to the report. Three notable additions were made: one in the Executive Summary to clarify the market-oriented focus on asymmetric regulation, with symmetric regulation addressed in a subsidiary manner; and another in the conclusions to reinforce the importance of Significant Market Power (SMP) regulation in ensuring effective access to telecom infrastructure. Finally, following the CN meeting, a better delineation of the symmetric approaches has been added as well. Additionally, various wording adjustments were made throughout the report to improve clarity and readability, reflecting the input received during the consultation process.</p> <p>In conclusion, the Co-Chairs reaffirmed the relevance and complementarity of both asymmetric and symmetric regulatory regimes. They emphasised the continued importance of asymmetric regulation,</p>

	while acknowledging the potential of the GIA framework, noting that it is still too early to rely on it exclusively. They also pointed to the need for greater harmonisation in PIA pricing, given the significant variation observed across Europe. Challenges remain in collecting data from non-telecom infrastructure.
Conclusion	The BoR approved the documents for publication.

8 Planning and Future Trends (PFT)

8.1 Update on the development of the BEREC Work Programme 2026

Document(s)	BoR (25) 78 List of proposed items for the BEREC WP 2026
Introduction by	Incoming BEREC Chair (AKOS)
Information presented	<p>The Incoming BEREC Chair informed the BoR that the preparation of the BEREC Work Programme (WP) for 2026 is underway. The aim is to create a 'light' WP with up to 50 projects, emphasising that fewer projects are preferable. The expected DNA proposal, anticipated to be published by the end of 2025, may necessitate additional ad hoc work, particularly in the first and second quarters of 2026. To ensure the feasible and realistic implementation of the BEREC WP 2026, it is crucial to limit the number of optional proposals to the most relevant ones. Instead of the traditional prioritisation exercise, a more qualitative approach was adopted, similar to the previous year. He stressed that Working Groups (WGs) play a significant role in finalising the list of Priority Deliverables (PRDs).</p> <p>He outlined the progress made so far and reported that bilateral meetings with WG Co-Chairs and the Incoming Chair's Team are currently in progress to identify the most relevant topics.</p> <p>The Incoming BEREC Chair reported that at CN there was support for creation of a 'light' Work Programme and acknowledgement that the Code review and DNA will require additional work from several WGs. There is also wide support for an early call for drafters with an extended timeline.</p> <p>He informed the BoR about the current status of the WP. In total there are 118 proposals, which have been streamlined to 42, although this number is not final. Forty-one proposals were not taken on board due to duplication, irrelevance or being out of scope, while 11 proposals were merged, and 25 were proposed for postponement.</p> <p>The Incoming BEREC Chair presented to the BoR the timeline of work, which includes: addressing the comments from the plenary meeting, conducting bilateral meetings and exchanges with the Co-Chairs to discuss the overall workload for each WG and the appropriate distribution of work throughout the year. He highlighted that an initial call for drafters will take place from August until the second half of September. He also reported that the PFT comment round will be held in August, possibly in parallel with CN input. The final draft WP should be submitted to CN 3 in September, followed by the P3 adoption for public consultation and the P4 final adoption.</p>
Conclusion	The BoR took note of the information.

8.2 BEREC Strategy 2026–2030

Document(s)	BoR (25) 80 Draft BEREC Strategy 2026–2030
Introduction by	PFT WG Co-Chairs (CNMC/AGCOM)
Information presented	<p>The Co-Chairs presented the process of reviewing and integrating BEREC's three strategic documents along with the Action Plan 2030, in response to ongoing shifts in technological, market and policy environments. This strategic update was developed collaboratively, involving WGs, Co-Chairs and the Mini Board, and following a dedicated strategic debate at Plenary 3 in 2024.</p> <p>A central element of the review is the updated mission statement, which now highlights BEREC's commitment to independent, forward-looking and high-quality regulation that serves the interests of European citizens. The strategic priorities have been refined to align with Article 3 of the EECC and the objectives of the Action Plan 2030. These priorities include fostering full connectivity and a robust Digital Single Market, supporting competitive and innovation-driven digital ecosystems, empowering end-users with a stronger emphasis on EU rights, contributing to the development of sustainable and secure digital infrastructure, and strengthening BEREC's internal capabilities.</p> <p>Overall, the revised strategy is designed to ensure BEREC remains agile and responsive in a rapidly evolving technological and legislative environment. Given the current uncertainty surrounding future developments, the strategy is intentionally framed as transitional, with the flexibility for a mid-term review before 2030. This approach allows BEREC to adapt as greater clarity emerges on long-term trends. Ultimately, the strategy reinforces BEREC's role as a forward-looking, evidence-based body in a dynamic regulatory ecosystem.</p>
Conclusion	The BoR approved the document for public consultation.

8.3 BEREC International Cooperation

Document(s)	No documents
Introduction by	BEREC Vice-Chair responsible for international activities (HAKOM)
Information presented	<p>The BEREC Vice-Chair responsible for international activities briefed the BoR on BEREC's upcoming international activities:</p> <ul style="list-style-type: none"> - BEREC study trip: The United Kingdom will be the destination for a two-day trip in mid-September; - MoU with OECD and Ofcom: The drafts have been prepared and at the moment there are consultations within the EC; - Joint Working Group meeting REGULATEL–BEREC in Montevideo (Uruguay) 17–19 June: The BEREC WG Co-chairs will participate remotely, in particular MEA WG for the report on PIA, OI WG for the report on the IP Interconnection ecosystem and EU WG for areas of special interest in the field of consumer protection;

	<ul style="list-style-type: none"> - Meeting of the EaPeReg Spectrum Experts Working Group (SEWG), 6–7 May: The BEREC WNE Co-Chairs will participate remotely; - ITU GSR, 31 August – 3 September 2025 in Riyadh, Saudi Arabia; - EaPeReg virtual plenary on 17 June 2025.
Conclusion	The BoR took note of the information.

9 Roaming (ROAM)

Document(s)	BoR (25) 81 Draft 5 th Ukraine Roaming Monitoring Report
Introduction by	ROAM WG Co-Chairs (RTR/EETT)
Information presented	<p>The Co-Chairs outlined BEREC's monitoring of the Joint Statement (JS) between Ukrainian (UA) and European Economic Area (EEA) telecom operators, initiated in response to the war in Ukraine. Since the JS was signed in April 2022, BEREC has conducted five monitoring rounds, with the latest results presented in June 2025. The JS has been periodically prolonged, reflecting ongoing cooperation and support.</p> <p>The 5th monitoring involved only JS signatories: 48 EEA mobile, 28 EEA fixed, 4 UA mobile and 2 UA fixed operators. It covered areas such as termination, transit and roaming, along with qualitative feedback. The questionnaire aimed to evaluate the implementation and impact of the JS commitments.</p> <p>Key findings showed that termination rates have increased and remain significantly above Eurorates. Wholesale roaming rates have remained stable and below regulatory caps. Transit rates continue to vary widely but are generally stable. Notably, traffic from UA customers to EEA networks exceeds traffic in the opposite direction.</p> <p>In conclusion, the Co-Chairs illustrated the main observations made by operators, which reported few fraud incidents, with preventive measures in place. However, challenges in the implementation of the JS persist, particularly due to the lack of direct interconnection agreements, leading to difficulties in reducing rates, and the transit rates. Despite these obstacles, many operators continue to offer voluntary support measures such as zero-rated calls, free SIM cards, free roaming services, etc.</p>
Conclusion	The BoR approved the document for publication.

10 Cybersecurity and Resilience (CSR) – Oral update on BEREC's ad hoc work to support reinforcing the EU's cybersecurity and resilience capabilities

Document(s)	BoR (25) 82 Draft Summary of the BEREC sessions at ENISA Telecom and Digital Infrastructure Security Forum 2025
Introduction by	CSR WG Co-Chairs (AKOS/HAKOM)
Information presented	The Co-Chairs provided a short update on the Strategic Recommendation 3 (SR3) of the Nevers risk assessment and the NIS Cooperation Group (NIS CG) questionnaire. They first recalled its purpose, namely to create transparency on the landscape of suppliers and M(S)SPs used for fixed

	<p>networks, fibre technology, submarine cables, satellite networks and other important ICT suppliers. The Co-Chairs also showed the timeline for the submission of the results of the questionnaire to NIS CG.</p> <p>Secondly, the Co-Chairs provided a summary of BEREC's participation in the ENISA Telecom and Digital Infrastructure Security Forum 2025, held in Amsterdam. The event focused on emerging cybersecurity threats and innovative defence strategies within the electronic communications sector. It brought together a diverse group of experts to explore how evolving technologies and collaborative approaches can strengthen network resilience.</p> <p>BEREC's presentations included a case study on a large-scale cyberattack targeting A1 Telekom Austria, which underscored the critical importance of robust password policies, multi-factor authentication and encrypted communications. Other sessions delved into the use of deception technologies such as honeypots and honeynets, which enable real-time detection and analysis of cyber threats. These AI-powered tools offer valuable insights into attacker behaviour and significantly enhance both internal defences and external threat awareness.</p> <p>A standout feature of the forum was the presentation of the Cyber Conflict Simulator (CCS), developed by the University of Zagreb and Utilis. Unlike traditional tabletop exercises, CCS offers a realistic, tactical-level simulation environment for cyber incident training. It allows for detailed modelling of organisations and complex cyber scenarios, enabling decision-makers to test and refine their responses. Designed for both civil and military use, the simulator is accessible to users without deep technical expertise and compresses months of training into a single day, providing a highly effective, hands-on learning experience.</p> <p>The forum also highlighted the transformative role of AI in next-generation threat detection and response. Presentations by Ericsson and EVIDEN (ATOS) demonstrated how AI is revolutionising cybersecurity by enabling faster threat detection, reducing false positives and automating responses to sophisticated attacks. These AI-driven systems are becoming essential tools for securing telecom networks, offering proactive defence mechanisms that can anticipate and neutralise threats before they escalate.</p> <p>In conclusion, the Co-Chairs emphasised the value of co-organising the forum with ENISA. The collaboration successfully merged technical and market-oriented perspectives, engaging a broad spectrum of stakeholders – including operators, regulators, cybersecurity professionals and academic experts – and fostering a comprehensive dialogue on the future of telecom security.</p>
Conclusion	The BoR approved the document for publication.

11 Fixed Network Evolution (FNE)

11.1 Draft BEREC Guidelines on the coordination of civil works according to Article 5(6) of the Gigabit Infrastructure Act

Document(s)	BoR (25) 83 Draft BEREC Guidelines on the coordination of civil works according to Article 5(6) of the Gigabit Infrastructure Act
Introduction by	FNE WG Co-Chairs (BNetzA/ARCEP)

Information presented	<p>The Co-Chairs first gave an overview of the Gigabit Infrastructure Act (GIA) and the scope of the guidelines. Adopted in May 2024, the GIA was designed to accelerate the rollout of VHCNs by replacing the Broadband Cost Reduction Directive (BCRD). It introduces key provisions including improved access to physical infrastructure, better coordination of civil works and streamlined permitting procedures. Article 5 of the GIA specifically requires infrastructure owners to accommodate reasonable requests for civil works coordination. In this context, BEREC is tasked with issuing guidelines by November 2025. These guidelines will address cost apportionment, criteria for dispute resolution by Dispute Settlement Bodies (DSBs) and standards for ensuring sufficient capacity to meet foreseeable future needs.</p> <p>Secondly, the Co-Chairs presented the main findings from the initial call for input. To inform the development of these guidelines, the FNE Working Group conducted two rounds of questionnaires during the summer of 2024, gathering 88 responses from stakeholders, NRAs and DSBs. The responses revealed limited hands-on experience with civil works coordination, although some countries have already issued guidance on cost apportionment. Stakeholders highlighted the importance of transparent and efficient dispute resolution mechanisms. These insights were instrumental in shaping the draft guidelines, which were developed in close collaboration with the EC.</p> <p>Furthermore, the Co-Chairs presented the content of the BEREC Guidelines. As for the apportioning of the costs, the draft guidelines propose that directly attributable costs should be borne by the responsible party, while shared costs should be allocated using objective, equitable or proportional formulae. An example formula was provided by the Co-Chairs to illustrate proportional cost-sharing based on the number of ducts or pipes deployed. For dispute resolution, the guidelines stress adherence to principles such as the independence of the DSB and procedural transparency. Given the GIA's one-month deadline for resolving disputes, the process must facilitate rapid information exchange. Where essential information is missing, national rules may allow for suspension or extension of the deadline. To support this, BEREC included a list of suggested information requirements and proposed an optional standard agreement model to ease negotiations. Regarding capacity planning, the guidelines clarify when a refusal to coordinate civil works is justified – particularly in rural areas – if the deploying party can demonstrate that the infrastructure will support future third-party access.</p> <p>In conclusion, the Co-Chairs presented a methodology for estimating future capacity needs, which includes assessing the number of households and businesses, calculating the required fibre volume and determining the necessary physical infrastructure. Annexes to the guidelines provide illustrative models and formulae to support these calculations.</p>
Conclusion	The BoR approved the document for public consultation.

11.2 Draft BEREC Guidelines on access to in-building physical infrastructure according to Article 11(6) of the Gigabit Infrastructure Act

Document	BoR (25) 84 Draft BEREC Guidelines on access to in-building physical infrastructure according to Article 11(6) of the Gigabit Infrastructure Act
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Introduction by	FNE WG Co-Chairs (BNetzA/ARCEP)
Information presented	<p>The Co-Chairs first gave an overview of the Gigabit Infrastructure Act (GIA) and the scope of the guidelines. Adopted in May 2024, the GIA was designed to accelerate the rollout of VHCNs by replacing the Broadband Cost Reduction Directive (BCRD). It introduces key provisions including improved access to physical infrastructure, better coordination of civil works and streamlined permitting procedures. Article 11 of the GIA introduces a specific obligation for owners of physical infrastructure to accommodate any reasonable request for access to in-building infrastructure. In this context, BEREC is tasked with issuing guidelines by November 2025 which will define the terms and conditions of access and establish a procedural guidance to set criteria for dispute resolution by Dispute Settlement Bodies (DSBs).</p> <p>Secondly, the Co-Chairs presented the main findings from the initial call for input. To support the development of these guidelines, the FNE Working Group conducted two rounds of questionnaires during the summer of 2024, collecting 86 responses from stakeholders, National Regulatory Authorities (NRAs), and DSBs. The responses indicated limited practical experience with civil works coordination. However, stakeholders consistently highlighted the importance of transparent and efficient dispute resolution mechanisms. These findings served as the foundation for the draft guidelines, which were developed in close cooperation with the EC.</p> <p>Furthermore, the Co-Chairs presented the content of the BEREC Guidelines. Regarding the terms and conditions for accessing in-building physical infrastructure, when the infrastructure is owned by the building owner, BEREC recommends that access be granted free of charge. This would reflect common practice across Member States, the added value for the building owner of having these services available and the GIA's goal of accelerating network deployment at lower costs. In cases where the infrastructure is owned by an electronic communications network (ECN) operator, access fees should be fair and reasonable, reflecting the operator's investment and first-mover advantage. Any charges should be evidence-based and calculated using a straightforward methodology. Moreover, access delays should be kept within reasonable limits and, where possible, sharing fibre rather than the infrastructure itself is encouraged as a best practice. The Co-Chairs highlighted that access conditions to fibre are outside the scope of BEREC guidelines.</p> <p>In conclusion, the guidelines stress that dispute resolution processes must adhere to fundamental principles such as the independence of the DSB and procedural transparency. Given the GIA's strict one-month deadline for resolving disputes, the process must facilitate swift information exchange. Where essential information is lacking, national procedural rules may permit the suspension or extension of the deadline. To aid this process, BEREC has provided a list of recommended information requirements to ensure clarity and transparency, helping to streamline dispute resolution.</p>
Conclusion	The BoR approved the document for public consultation.

12 Sustainability (SUS) – Oral update on the EC's draft Code of Conduct for ECN/ECS

Document(s)	No documents
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Introduction by	SUS WG Co-Chairs (ARCEP/EETT)
Information presented	<p>Building on BEREC's previous work on sustainability indicators and the findings of a Joint Research Centre study, the EC launched a project last year to develop common indicators for monitoring and benchmarking the energy consumption and environmental footprint of telecom networks. The EC aims to establish a Code of Conduct by the end of 2025. The forthcoming Code defines best practices based on standards to be adopted by the stakeholders involved in the design, operation and maintenance of telecommunication networks. Its primary aim is to measure and assess their environmental impact.</p> <p>The Co-Chairs first briefed the BoR on the latest developments of the document. In mid-April the WG received a new draft of the Code, including 8 indicators to cover energy efficiency, energy consumption, GHG emissions and other environmental aspects. For each indicator, a set of expected and optional practices is certified, both at an entire network infrastructure level as well as for specific network segments if these are available. In addition, each best practice is based on a set of complimentary standards which focus notably on the definition of organisational rules and processes, as well as technical specifications for the collection, analysis and reporting of sustainability data. The WG welcomed the updated Code of Conduct, agreeing with the general objectives and recognising it as a significant step towards enhancing the sustainability of telecom networks and a valuable regulatory tool.</p> <p>Secondly, the Co-Chairs presented the results of the workshop organised on 6 May by the EC, with the presence of industry stakeholders. On 16 May, following the discussion at the panels and the WG internal meeting, the Co-Chairs sent their feedback to the EC, addressing areas to be improved. For instance, regarding the scope of the document, the initial scope covers telecommunication, but there was a debate on whether to consider the data centres for telecommunication operations. Other topics to be improved related to the recommendation of specific standards and best practices, the way to conduct auditing, the integration of the Code with the EU taxonomy and the establishment of clear targets for reducing network environmental footprints.</p> <p>In conclusion, the Co-Chairs confirmed their availability to assist the EC in finalisation of the Code of Conduct. According to the information received from the EC, the WG will receive a new version of the document this summary for publication in late 2025.</p>
Conclusion	The BoR took note of the information.

13 Summary of the 13th BEREC Stakeholder Forum

Document(s)	No documents
Introduction by	BEREC Office Communications Team Leader
Information presented	<p>The Communications Team Leader of the BEREC Office presented a comprehensive overview of the planning, execution and outcomes of the Stakeholder Forum 2025. Hosted at the 'The EGG' conference centre, the forum featured a dynamic programme including a Meet & Greet session, a conference focused on end-user empowerment and market power regulation, and a networking reception. The event also marked the</p>

	<p>celebration of BEREC's 15th anniversary, adding a festive dimension to proceedings.</p> <p>Several new elements were introduced this year: a dedicated event logo and visual identity, a targeted promotional campaign aligned with a BEREC Communication Plan 2025 project and use of the BEREC website as the central hub for all event-related information. The forum attracted 611 registered participants, with 305 attending in person. Online engagement was strong, with over 1,200 livestream views and a LinkedIn engagement rate of 15.39%, representing 261 organisations from 49 countries. Post-event follow-up included the publication of video recordings, transcripts and a feedback survey. Of the 65 respondents, the majority expressed strong support for making the forum a recurring event. Suggestions for improvement included more interactive formats, longer Meet & Greet sessions and the possibility of hosting the next edition in Riga, Latvia – 63% indicated they would attend if held there.</p> <p>The Communications Team Leader of the BEREC Office also shared some ideas for the 2026 edition, for instance starting the event later in the day, extending it to 1.5 days, engaging professional moderators and ensuring gender balance among speakers. The proposed topics would reflect a forward-looking agenda, with suggestions such as the Digital Network Act, AI regulation, net neutrality, sustainability, cybersecurity and rural connectivity – aligning with evolving digital policy priorities.</p> <p>In conclusion, the Communications Team Leader of the BEREC Office illustrated the procurement timeline to consider for the organisation of next year's Stakeholder Forum.</p>
Conclusion	The BoR took note of the information.

14 Digital Markets (DM)

14.1 Draft BEREC Report on the domestic submarine cables in the different Member States

Document	BoR (25) 85 Draft BEREC Report on the domestic submarine cables in the different Member States
Introduction by	DM WG Co-Chairs (ANACOM/ARCEP)
Information presented	<p>The Co-Chairs began their presentation by outlining the scope and objectives of the Project Requirement Document (PRD). The initiative aims to support the European Commission's study for implementing Recommendation (EU) 2024/779 on secure and resilient submarine cable infrastructures. It also seeks to produce a report on the economic regulatory frameworks governing domestic submarine cables across BEREC member countries. Additionally, the project involves organising workshops and meetings with international regulatory networks such as REGULATEL and EMERG, as well as with stakeholders, to facilitate knowledge exchange and address common challenges in submarine cable deployment and management.</p> <p>The report has three main objectives. First, it aims to map domestic submarine cable systems that support communication services across Europe and to understand the purposes behind their deployment. Second, it provides detailed insights into the historical and current <i>ex ante</i> economic regulatory treatment of these systems, including case studies from Iceland, Portugal and Spain. Third, it identifies key challenges and emerging trends</p>

	<p>as reported by NRAs. To gather this information, BEREC distributed a questionnaire to all member NRAs. However, due to confidentiality and security concerns, some countries were unable to provide data, necessitating the use of publicly available sources.</p> <p>The findings revealed that 15 out of 27 coastal countries have domestic submarine cable segments, predominantly located in the Mediterranean and Atlantic regions. These cables are mostly deployed by Electronic Communications Network (ECN) operators for their own infrastructure, though many also offer wholesale services. A significant number of these systems are over 10 years old, and nearly 20% have received public funding. Regulatory approaches vary: six NRAs have conducted market analyses, with four continuing to regulate submarine cables and two having deregulated while still monitoring developments. Regulatory remedies include access obligations, transparency measures and price controls. Key challenges identified include ensuring the security and redundancy of connections, replacing ageing infrastructure and securing the substantial investments required.</p> <p>In conclusion, the Co-Chairs outlined the next steps, which would follow the approval of the report for public consultation, and reiterated their availability to cooperate with the EC.</p>
Conclusion	The BoR approved the document for public consultation.

14.2 Oral update on BEREC contributions to the implementation of digital regulations

Document	No documents
Introduction by	DM WG Co-Chairs (ANACOM/ARCEP)
Information presented	<p>The Co-Chairs recalled the aim of the presentation, which is to provide an overview of BEREC's past and ongoing contributions to the implementation of digital regulations and identify areas where BEREC's input could be particularly valuable in the future. The focus was on how BEREC has engaged with key legislative frameworks such as the Digital Markets Act (DMA), the Digital Services Act (DSA), the Data Act and emerging AI regulations, as well as its broader role in analysing the evolution of digital markets.</p> <p>BEREC has played a proactive role in shaping and supporting the implementation of digital regulations. For the DMA, it has contributed since 2016 through reports, opinions and papers, and more recently through opinions on Meta's reference offers and participation in the DMA High-Level Group. BEREC also hosted a workshop on the DSA's interplay with the EECC and issued a high-level opinion on the Data Act, maintaining close cooperation with the European Commission. In the AI domain, BEREC published a report on AI in telecoms and is currently working on further analysis, including a high-level opinion on AI and virtual worlds. Additionally, BEREC has produced several analytical reports on digital market trends, including cloud computing, internet ecosystem bottlenecks and the entry of large content providers into ECS/ECN markets.</p> <p>The Co-Chairs concluded the presentation describing the current and future role of BEREC in the framework of these digital regulations. BEREC is assisting the European Commission with the implementation of Article 7 on interoperability for NI-ICS, contributing to the DMA HLG and subgroups,</p>

	and will work on the DMA review with a focus on cloud services, NI-ICS evolution and interoperability in other areas like ad tech. In the AI field, BEREC will direct its attention to AI in telco, competition, internet openness and user rights, and possible environmental impacts. Regarding the Data Act, BEREC aims to reinforce its role in cloud services, which are also addressed by the DMA and potentially the upcoming Digital Network Act. Finally, BEREC sees value in fostering dialogue on the interplay between various digital regulations, namely the DMA, the DSA, the DA and the AIA.
Conclusion	The BoR took note of the information.

15 Discussion on preparations for future EC workshops

Document(s)	No documents
Introduction by	BEREC Chair (ComReg)
Information presented	The BEREC Chair recalled the workshop held on 31 March between the European Commission (EC) and BEREC. During the meeting, it was announced that the EC plans to hold two additional workshops: one on governance scheduled for 15 July and another on access planned for September.
Conclusion	The BoR took note of the information.

16 AOB

16.1 Information on the 64th BoR plenary meeting (2 October 2025, Bulgaria)

Document(s)	No documents
Introduction by	Representative of host NRA (CRC)
Information presented	The Representative of the host NRA provided information on the logistics for the next 64 th BoR plenary meeting, which will take place on 2 October 2025 in Bulgaria.
Conclusion	The BoR took note of the information.