BEREC report on the outcome of the public consultation on the draft BEREC Work Programme 2026

04 December 2025

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INTRODUCTION

The Body of European Regulators (BEREC), at its 64th Plenary Meeting (2–3 October 2025), approved the draft BEREC Work Programme 2026 for public consultation. This public consultation is the penultimate stage in developing the Work Programme. Its purpose is to increase transparency and provide BEREC with valuable feedback from all interested parties. The consultation on the draft document follows BEREC's initial public call for inputs (CFI) to the Work Programme 2026, which closed in April 2025 and prompted a wide range of stakeholder engagement.

In accordance with BEREC's policy on public consultations, this report summarises how stakeholders' views have been considered. In addition, BEREC publishes all individual contributions on its website, taking into account stakeholders' requests for confidentiality. The public consultation was open until 3 November 2025.

This report summarises the responses received to the public consultation and presents BEREC's position regarding the suggestions and proposals put forward in those responses, as relevant.

Sixteen responses were received. Non-confidential contributions were submitted by the following organisations: EENA, ecta, Samsung Electronics, a multi-company response (Amazon, Apple, Broadcom, Cisco Systems, Extreme Networks, HP, Intel and Meta), Apple, Vantage Towers, EWIA, Vodafone, Connect Europe, BREKO, MVNO Europe, FTTH Council Europe, Twilio, GSMA, DSA and BEUC. The submissions are published on BEREC's website; please consult the published documents for the definitive version of stakeholders' views, which are summarised in this report.

BEREC welcomes all contributions and thanks all stakeholders for their submissions.

In general, stakeholders support the projects included in BEREC's draft Work Programme 2026.

BEREC notes that many stakeholders are keen to engage further through additional consultations beyond those already planned for 2026. BEREC will provide opportunities for stakeholder engagement, as appropriate, through its formal consultations, calls for input, workshops, questionnaires, and other activities related to the projects set out in the BEREC WP 2026. BEREC appreciates the willingness of stakeholders to contribute to its work in 2026 and considers stakeholder input essential to the way it operates.

The stakeholders recognized the important role of the BEREC and its willingness to cooperate in the process of the review of the EECC and its proposed analysis of the DNA. The stakeholders recognised the important role of BEREC and its willingness to cooperate in the review process of the EECC and its proposed analysis of the DNA.

BEREC received a substantial number of specific comments from stakeholders, which are summarised by section below, together with BEREC's corresponding replies and the conclusion.

BACKGROUND

General comments:

EENA Welcomes the opportunity to respond to this public consultation on BEREC's Draft Work Programme for 2026. EENA's comments are limited to elements of the work programme concerning the promotion of citizens' interests, particularly those related to emergency communications.

ecta welcomes the opportunity to comment on the draft BEREC Work Programme, which outlines workstreams to be delivered by BEREC in 2026 and potential work for 2027 and beyond. ecta appreciates that BEREC is offering stakeholders the opportunity to contribute to refining the draft WP2026 before its final adoption.

Connect Europe welcomes the opportunity to provide input on the draft BEREC Work Programme for 2026. Connect Europe emphasises that, in general, BEREC should primarily focus its ongoing tasks on issues mandated by EU legislation. These include, but are not limited to, the EECC, the BEREC Regulation, the Open Internet Regulation, the Roaming Regulation, the Digital Markets Act, and any future legislation, such as the Digital Networks Act. In this context, it is crucial that the new work programme remains within the scope of the existing EU legal framework and ensures consistency and coherence.

BREKO supports BEREC's continued focus on ensuring competitive, investment-friendly, and innovation-driven connectivity markets in Europe. From BREKO's perspective, BEREC's independent expertise will be particularly valuable in the upcoming 2026 legislative discussions, especially in helping to ensure that regulation continues to support competition, consumer interests, and investment in high-quality networks.

MVNO Europe welcomes the opportunity to provide brief comments on the draft BEREC Work Programme. MVNO Europe thanks BEREC for considering the requests expressed in our response to BEREC's Call for Input. MVNO Europe supports the contents of the draft WP2026.

The FTTH Council Europe welcomes BEREC's continued commitment to competitive, innovative, and sustainable electronic communications markets, as highlighted in the Draft Work Programme 2026. The FTTH Council Europe values the recognition of fibre-based, ultra-high-speed networks as essential drivers of the Digital Decade objectives. From the FTTH Council Europe's perspective, the emphasis on the forthcoming 2026 legislative discussions, where BEREC provides expert and independent advice to the co-legislators and the European Commission, is critically important. As a more political approach is taken to legislative initiatives, BEREC, as a collective of politically independent regulators, can serve as a counterbalance to ensure regulation continues to promote consumer welfare, competition, and user rights.

Twilio welcomes BEREC's establishment of clear deliverables under each high-level priority and looks forward to further engagement with BEREC in achieving these priorities throughout 2026. BEREC's intention to enhance knowledge and understanding through internal and

external workshops is a positive development, and Twilio is ready to contribute its experience as a B2B Cloud Communications provider operating across Europe, particularly in the context of BEREC's planned input into the review of the EECC and its proposed analysis of the DNA. Twilio's recommendations to BEREC aim to promote a truly competitive, open, and innovative Digital Single Market through harmonisation and the development of a flexible, future-proof regulatory framework.

DSA, the Dynamic Spectrum Alliance supports BEREC's strategic priorities of promoting universal and high-quality connectivity, fostering competition-driven and open digital ecosystems, empowering end-users, and advancing environmentally sustainable, secure, and resilient communications infrastructures. DSA also commends BEREC's continued focus on strengthening its institutional capacity and ensuring the coherent, evidence-based implementation of European connectivity objectives under the EECC and the Digital Decade policy framework.

In this context, the DSA highlights the crucial importance of efficient and innovative spectrum management as a foundation for achieving these priorities. Dynamic and shared spectrum access models can unlock underutilised frequencies, expand broadband availability, and reduce deployment costs, thus accelerating Europe's progress towards universal gigabit connectivity. By fostering a regulatory environment that encourages both licensed and licence-exempt spectrum use, BEREC can help ensure that connectivity is not only high-quality and resilient, but also inclusive, affordable, and sustainable.

BEUC welcomes BEREC's continued commitment to upholding the strategic objectives of the EECC across its workstreams, as well as its additional obligations and input on digital markets, artificial intelligence, and data. The ongoing inclusion of BEREC's strategic priority to empower end-users is welcome, and BEUC stands ready to support this important work through to 2026.

BEUC supports the independent, expert role of BEREC and its National Regulatory Authorities (NRAs) in the review of the EU telecoms regulatory framework. We also welcome BEREC's commitment to actively contribute to this process. BEUC calls on BEREC and its NRAs to ensure that this review does not compromise the primary objectives of the EECC: promoting competition, the internal market, and safeguarding end-user interests.

BEUC welcomes BEREC's commitment to uphold the strategic objectives of the EECC outlined in Article 3(2), particularly those relating to the protection of consumer rights. BEUC welcomes BEREC's recognition of universal service and consumer protection as important horizontal principles that are an essential part of its high-level priorities, and recalls that this commitment should be fully reflected in future work programme activities.

BEREC once again thanks all stakeholders for their support and contributions, and reiterates that it will ensure sufficient opportunities for stakeholder participation. BEREC also notes that the Work Programme appropriately allocates and balances the planned activities across all five strategic priorities.

BEREC is pleased to note that all stakeholders acknowledge its active role across a wide range of areas, including consumer protection, strengthening competition, and encouraging investment in high-quality, sustainable, and resilient networks.

BEREC thanks Connect Europe for highlighting the importance of ensuring that the Work Programme remains aligned with the existing EU legal framework. In this regard, BEREC clarifies the following: Although this Work Programme also focuses on the upcoming 2026 legislative discussions to provide expert, independent advice to the co-legislators and the European Commission, its objectives remain grounded in the BEREC Strategy 2026–2030. It remains closely aligned with the high-level strategic priorities and the four objectives set out in Article 3(2) of the EECC, which form the foundation for the work defined in all of BEREC's annual Work Programmes.

BEREC notes that it has addressed the specific comments received throughout the document.

BEREC WORK IN 2026

ecta notes that expected modifications to the EU regulatory framework for electronic communications are the crucial topic for 2026. ecta values that the draft WP2026 addresses the upcoming 2026 legislative discussions on the evaluation of the EECC and the expected tabling of a European Commission legislative proposal for a Digital Networks Act (DNA). Proactive BEREC engagement, participation in discussions at all levels, and the provision of expert and independent advice to the co-legislators and the European Commission are of essential importance from ecta's perspective. It is much appreciated that BEREC has appointed an extended mini board in this specific context.

That being stated, ecta urges BEREC to dedicate a separate chapter of the Work Programme to BEREC's approach to expected proposals modifying the EU regulatory framework, and to confirm that it is maintaining a well-resourced working group on call during the co-legislative procedure and related reviews of secondary regulation. BEREC's specific attention is also needed in the context of the scheduled 2026 review of the digital targets for 2030 contained in the Digital Decade Policy Programme (DDPP). Consideration of digital targets should be added to BEREC's draft WP2026. Considering BEREC's extensive responses to the European Commission's Call for Evidence on the DNA and to the public consultation on the revision of the Recommendation on Relevant Markets Susceptible to Ex-Ante Regulation, ecta urges BEREC to prepare a set of concise briefing notes for co-legislators, based on BEREC's responses.

Overall, ecta expects BEREC and NRAs to continue to focus, in the context of potential changes to the EU regulatory framework, on what is truly important to enable and improve competition at the network and service levels of electronic communications markets for business-to-consumer (B2C), business-to-business (B2B), business-to-business-to-consumer (B2B2C), and Internet of Things (IoT) markets. ecta explicitly asks BEREC to place the promotion of competition at the centre of its considerations. The role of BEREC should not be limited to analysing developments; BEREC can and should actively encourage NRAs to take decisive action where competition is placed in peril.

MVNO Europe notes that BEREC's much-needed, fact-based input will be crucial in 2026 and beyond in the context of the co-legislative procedure on a Digital Networks Act and related initiatives expected to be launched by the European Commission. MVNO Europe expects BEREC to engage actively with the European Commission, as well as with all EU institutions and national governments. MVNO Europe therefore urges BEREC to be prepared to express its views on both legislative proposals and non-legislative initiatives from the European Commission, and to proactively communicate BEREC's opinions and other materials to all institutions. The preparation of short briefing notes explaining the issues at stake, the facts informing the debates, and BEREC's opinions would be most welcome.

MVNO Europe urges BEREC to dedicate a separate chapter of the Work Programme for 2026 to BEREC's approach to expected proposals modifying the EU regulatory framework for electronic communications. Furthermore, MVNO Europe asks BEREC to confirm that it will

keep a working group available to address any matters arising during the co-legislative procedure and related reviews of secondary regulation. The creation of such a working group was indicated in last year's consultation, but this is not apparent in the draft WP2026.

GSMA notes that the 2026 Work Programme is being prepared at a critical time for Europe's connectivity sector. The upcoming Digital Networks Act and other new digital policy initiatives will shape the framework for investment, competition, and innovation in the coming years. In this context, close cooperation between regulators and industry is vital to achieve Europe's digital transformation objectives, support efficient investment, and preserve global competitiveness. It is important to adopt balanced and technically grounded approaches that build on international standards and industry input.

BEUC stresses the importance of BEREC addressing the expected proposals for a comprehensive review of the EU regulatory framework for the telecoms sector, which are to be presented in 2025. Over the past year, BEUC and its member organisations, together with relevant stakeholders from civil society and industry, have repeatedly expressed concerns regarding the European Commission's proposals for potential changes to the EU regulatory framework for electronic communications.

As the Commission prepares to present its legislative proposal for a Digital Networks Act (DNA) in December 2025, it is essential to ensure that any policy measure does not compromise the primary objectives of the EECC: promoting competition, supporting the internal market, and safeguarding end-user rights. Current discussions on competitiveness and scalability indicate that the Commission may propose measures to encourage growth in the telecommunications sector. However, this must not be at the expense of net neutrality, Quality of Service (QoS), or higher prices for end-users.

BEREC thanks ecta for highlighting the importance of upcoming regulatory developments and BEREC's role in these discussions. In this context, BEREC confirms its readiness to engage in the review of the EECC and the proposed analysis of the DNA, as already reflected in the Work Programme. BEREC also confirms that additional internal processes have been established to enable proactive engagement, participation in discussions at all levels, and the timely delivery of expert, independent advice and other appropriate input. Similarly to MVNO Europe's emphasis on ensuring adequate focus on forthcoming legislative proposals, BEREC confirms that the Regulatory Framework WG has reserved resources to efficiently address any matters arising in the context of the co-legislative procedure on a Digital Networks Act and related initiatives expected in the coming year.

1. Strategic priority: Promoting full connectivity and the Digital Single Market

The multi-company response notes that in a gigabit society, speed is an important component of full connectivity. However, other aspects of a high-quality connected experience, such as latency, resilience, and jitter, should also be considered. To accurately capture the quality of connection experienced by end users, performance measurements should go beyond coverage and download capacity, including download and upload speeds, latency, jitter, and resilience, calculated during busy hours (or working hours for enterprises). Key performance indicators should be defined to ensure that high-quality gigabit connectivity is actually available to end users, particularly indoors, where most bandwidth-intensive, low-latency activity occurs. A harmonised measure of actual speeds and quality of service for end users in indoor locations would be a significant step towards ensuring full connectivity across Europe.

EWIA notes that its members in the neutral-host TowerCo sector enable downstream competition among active networks and retail service providers by reducing barriers to entry and lowering operating costs through sharing and efficient management. The functioning and competitive nature of the neutral-host TowerCo sector ultimately benefit consumers and technology-enabled businesses through both price advantages and high service quality. In line with BEREC's strategic focus areas and the broader EU digital agenda, EWIA believes that the role of TowerCos providing open access to shared wireless infrastructure through a neutral-host model will be critical to meeting Europe's 2030 targets. EWIA recognises the importance of BEREC's work in promoting full connectivity across Europe for the benefit of businesses, administrations and citizens.

Connect Europe welcomes BEREC's priority of promoting full connectivity and the Work Programme's focus on fostering predictability for operators. A strong emphasis on promoting investment should be maintained, alongside creating a regulatory environment that provides appropriate incentives to achieve the strategic vision and policy objectives set out by the EU Commission. This is especially necessary given the challenges faced by the sector. Although promoting investment is mentioned in the Work Programme, Connect Europe believes that BEREC could place greater emphasis on creating the right regulatory environment paired with appropriate incentives.

Furthermore, to achieve a truly integrated EU telecoms single market, it is crucial that BEREC supports measures aimed at harmonisation through deregulation and simplification. This will reduce fragmentation and complexity for operators entering different markets.

The revision to determine the proper functioning of the EECC is scheduled for 2025, alongside the upcoming DNA proposal, which will play a central role in the comprehensive roll-out of gigabit infrastructures and in achieving the ambitious connectivity targets set in the Commission's Digital Decade Programme. Connect Europe encourages BEREC to include stakeholders in this process to capture different perspectives from the earliest stage of assessment.

<u>MVNO Europe</u> notes with satisfaction that BEREC remains committed to closely monitoring market and technological developments related to roaming, as well as competitive and definitional aspects in the field of the Internet of Things (IoT), which is broader than the Machine-to-Machine (M2M) remit. This is of crucial importance for all types of MVNOs.

<u>FTTH Council Europe</u> notes that while ambitious goals for universal FTTH by 2030 are laudable, they must be balanced with practical implementation plans. Absolute targets risk being unachievable and could undermine credibility. The Swedish model, which sets a 98.5% FTTH coverage target, rightly acknowledges the high cost and impracticality of reaching every remote household with fibre. Targets should be both ambitious and achievable, with clear transition strategies for hard-to-reach areas.

The FTTH Council Europe would like to see a coherent regulatory environment for fibre markets, streamlining SMP ex-ante regulation in mature markets, while maintaining the possibility for ex-ante regulatory interventions in markets with noticeably asymmetrical market structures. The FTTH Council Europe fully supports measures to promote full connectivity and the Digital Single Market, as well as the roll-out and uptake of very high-capacity networks (VHCNs) across the EU. The FTTH Council Europe supports sustainable investment, removing deployment barriers, improving cross-border coordination, and helping to achieve the Digital Decade connectivity targets by 2030.

<u>Twilio</u> welcomes BEREC's calls for harmonisation in regulation and its implementation across the EU. Twilio strongly agrees that legal certainty is crucial in incentivising investment in the connectivity sector, with direct benefits to businesses and EU citizens, allowing them to access reliable, high-performance connectivity at an affordable cost.

Twilio's cross-border experience has been marked by extreme fragmentation, which detracts from the Single Market, along with the subjective implementation of EU legislation inherent in the process of transposing a Directive, as well as duplication and redundancy across different regulatory regimes. Current telecommunications rules are not agile enough to keep pace with innovation and do not provide consistency for the digital age. This will undermine the uptake across the EU of new solutions that innovation, including cloud communications technology, provides and will have knock-on effects on Europe's competitiveness and economies, as well as on meeting Digital Decade targets.

BEREC's assessment of the EECC against its objectives and its input into the DNA as it proceeds through the legislative process offer an opportunity to examine these issues in more detail. Twilio suggests that more formalised outputs on the following two issues would be extremely valuable for BEREC to consider: harmonisation of numbering and sub-assignment; and harmonisation of KYC, SMS Sender IDs, national reporting requirements, and branded calling.

<u>DSA</u> notes that achieving full connectivity in Europe's digital future requires more than broad network availability; it requires delivering connectivity that meets the evolving and diverse needs of end users. Beyond deploying very high-capacity networks (VHCNs), success depends on ensuring these networks provide consistent, reliable, high-quality experiences everywhere, especially indoors, where most digital interactions occur.

Critical quality metrics such as low latency, minimal jitter, strong resilience to disruptions, and balanced uplink and downlink performance are essential for applications like telecommuting, e-health, immersive media, and Internet of Things (IoT) services. Hybrid network architectures that combine fibre, advanced mobile infrastructure, and licence-exempt technologies such as RLAN (e.g., Wi-Fi 6, 7 and beyond) are vital for overcoming indoor coverage gaps and enhancing user experience.

The DSA strongly encourages BEREC to implement and promote comprehensive, harmonised key performance indicators (KPIs) that measure not only coverage and peak speeds but also critical real-world experience parameters. These KPIs should include latency during high-traffic periods, throughput stability, jitter, uplink capacity, and robustness in diverse indoor scenarios. Transparent reporting and adherence to these KPIs will incentivise investment in seamless connectivity infrastructures and enable policymakers, industry stakeholders, and consumers to track genuine digital inclusion progress across European homes and workplaces.

DSA notes that while investments in network backbone and access infrastructure are essential, effective and user-friendly indoor connectivity depends heavily on in-building technologies such as mesh Wi-Fi systems, powerline communication technologies, and private 5G networks. Mesh Wi-Fi solutions improve coverage and user experience by creating interconnected wireless nodes that provide seamless roaming, automated network management, and robust security features. They are particularly effective in complex indoor environments, overcoming physical obstacles and ensuring consistent connection quality across multiple rooms or floors.

Powerline communication uses existing electrical wiring to extend network reach with relatively high bandwidth and coverage, offering an easy-to-deploy option where Wi-Fi alone may struggle. Affordable and scalable, powerline adapters complement wireless solutions and enable connectivity even in locations where wireless signals face interference or attenuation.

BEUC believes that BEREC's commitment to ensuring the harmonised application of European legislation and empowering EU consumers should remain a priority. In principle, BEUC supports the commitment to facilitate the roll-out of Very High Capacity Networks (VHCNs) as a contribution to addressing the digital divide. The improvement of network infrastructure should go hand in hand with providing accessible and affordable high-quality connectivity to all consumers, with particular focus on those who are most isolated. It is therefore encouraging to see BEREC's work enhancing coverage and take-up, and supporting future network roll-out through standardisation and interoperability efforts.

However, the roll-out of network infrastructure to deliver better, high-quality connectivity for consumers must align with the objectives of promoting competition and ensuring consumer protection. BEUC encourages BEREC to include language similar to its 2025 Work Programme, reiterating that closing the digital divide involves more than just the roll-out of VHCNs.

BEUC recommends that NRAs remain cautious during the upcoming review of the EU telecoms rules, particularly regarding any proposals aimed at meeting the Digital Decade connectivity targets for 2030. Any potential regulatory intervention based solely on self-

imposed numerical targets, without objective justification, proven necessity or consideration of unintended consequences, could harm both consumers and the market. These risks must be carefully analysed to avoid counterproductive effects and negative consequences. Connectivity targets should not be ends in themselves. They cannot justify actions that go against or trade off the fundamental regulatory objectives of promoting competition and consumers' interests and real needs.

BEREC expresses its appreciation to all stakeholders for their contributions and the broad support shown for the topics addressed under Strategic Priority 1.

BEREC welcomes MVNO Europe's interest in the IoT ecosystem. The ongoing analysis of Virtual Worlds and Web 4.0 (Carry-Over Project) already incorporates a broad definition of IoT and recognises its deep interconnection with the immersive, intelligent, and real-time services that Web 4.0 aims to deliver. More broadly, the project also addresses the connectivity requirements of emerging metaverse environments.

Twilio highlights areas where more formalised outputs could add value. In this context, BEREC would like to clarify that it is grateful for the suggestion to provide more formal outputs in general, as well as for the more concrete suggestions related to numbering issues. However, in light of its readiness to engage in the review of the EECC and the expected work on the DNA, BEREC takes note of these proposals, that will be put forward for final consideration in the context of future work.

BEREC thanks BEUC for highlighting the importance of consumer protection and the harmonised application of EU legislation. BEREC remains committed to its objective of ensuring transparency, protection, and empowerment of end-users as markets continue to evolve. This approach will be pursued not only through the PRDs under this priority area, but also in forthcoming discussions with social partners in the context of the EECC review and the preparation of the DNA.

1.1. Call for input on interfaces to mobile networks for developers and third-party services

ecta welcomes the inclusion of this work item. Regarding the role of APIs, ecta has so far maintained that API-based access is a positive commercial development that can foster a healthy ecosystem, but it is distinct from wholesale fixed and mobile network access as currently understood.

Apple notes BEREC's plan to launch a call for input on interfaces to mobile networks for developers and third-party services. The success of Europe's digital ecosystem depends on balancing innovation and openness with security, privacy, and user consent. Apple supports the development of interoperable, transparent frameworks that enable innovation while preserving the integrity of device platforms and networks. Any new regulatory guidance should

ensure that developer access to mobile network functions is voluntary, standards-based, and privacy-protective, consistent with existing user-centric safeguards on mobile operating systems.

Twilio greatly appreciates BEREC's attention and willingness to contribute to assessing the latest developments in wireless connectivity, including those related to cloudification and 'as a service' models featuring Application Programming Interfaces (APIs). As highlighted in our previous submissions, the cloudification and virtualisation of networks continue to drive innovation in the electronic communications sector, and the growth of Communications Platform as a Service (CPaaS) providers is a key part of this transformation. In this context, Twilio encourages BEREC to prioritise flexible, future-proof policy frameworks that recognise the distinct nature of cloud-based service providers, who, unlike traditional providers, are not dependent on physical infrastructure and are therefore well positioned to operate seamlessly across borders. Emerging technologies and innovative business models, such as programmable cloud communications and API-based services, should not face legal or regulatory hurdles, or use case discrimination, simply due to their novelty or divergence from legacy models and use cases. Twilio welcomes BEREC's intention to seek input on interfaces to mobile networks for developers and third-party services.

GSMA believes BEREC's exploration of mobile network APIs and the Open Gateway initiative is timely and essential. Open Gateway provides a framework for standardised, interoperable APIs across mobile network operators, offering significant potential for innovation. Deployment models vary from direct integration to aggregator-based federation, each with distinct implications for scalability, pricing, and governance. However, a critical barrier remains. Mobile operators are unable to implement some of the most innovative fraud and scam prevention APIs due to outdated sector-specific rules, such as the ePrivacy Directive. These laws often restrict data sharing with third parties, limiting the deployment of advanced anti-fraud tools despite rising threats. This regulatory inertia risks undermining consumer protection and market efficiency. BEREC's call for input is a vital step towards aligning regulatory frameworks with technological capabilities. Addressing legal constraints will be key to unlocking the full potential of network APIs, especially in fraud prevention and pan-European network slicing.

BEREC thanks ecta, Apple, Twilio and GSMA for their contributions. The proposed work item is intended to provide a high-level overview of the value chain, stakeholder types, and services related to interfaces to mobile networks for developers and third-party services. More specifically, it aims to explore both the opportunities and challenges that the development of third-party application programming interfaces (APIs) brings to mobile markets, as well as any potential regulatory issues that may arise. The main component of the work item will be a broad survey on this topic, for which stakeholders will be invited to provide input. BEREC will publish the inputs received and will consider potential next steps under the next work programme in 2027.

1.2. Fact finding report on the competition indicators and regulatory highlights in different jurisdictions

ecta thanks BEREC for including this item. ecta insists that this workstream must be accelerated to ensure that the final report is available during Q1 2026, in order to inform the expected co-legislative procedures on proposed modifications to the EECC and/or for a DNA, as well as the review of the DDPP.

In this report, the EU should not be considered as a single, undifferentiated entity. The differences between the situations in EU Member States must be objectively reflected, given that many Member States are world leaders on all relevant metrics (in both fixed and mobile markets), while a small number of Member States lower the EU averages, notably on FTTP. OECD data clearly highlights these differences in a broader comparison than the European Commission's annual reporting. In fact, all EU Member States except Belgium, the Czech Republic, Austria and Germany have an FTTP deployment rate higher than 60%, and 11 Member States have a deployment rate higher than 80%.

Vantage Towers encourages BEREC to ensure that this work examines not only service-level competition, but also infrastructure market dynamics, including access to land and lease aggregation. These factors directly influence the cost and speed of mobile network deployment. In recent years, new intermediaries have emerged, acquiring surface or usufruct rights over tower sites, with some engaging in speculative lease aggregation. These aggressive actors often exploit the lock-in position of infrastructure operators, demanding disproportionate rent increases despite existing contractual indexation. The mandate under Article 3(2) of the Gigabit Infrastructure Act, which requires negotiations on access to land to be conducted in good faith and for regulators to collect information about the conclusion of such agreements, provides a natural reference point for this work.

MVNO Europe actively supports the preparation of the proposed fact-finding report on competition indicators and regulatory highlights in different jurisdictions. MVNO Europe urges BEREC to accelerate the delivery of this work item to Q1 2026. This is necessary to ensure that the final report will be available to inform the co-legislative debates on proposed modifications to the EU legal and regulatory framework, as well as the review of the EU Digital Decade Policy Programme (DDPP), scheduled for June 2026.

FTTH Council Europe welcomes the work under heading 1.2, Fact-Finding Report on the competition indicators and regulatory highlights in different jurisdictions, as this will allow for a fact-based assessment of the market and appropriate regulatory requirements.

GSMA reiterates its support for BEREC's idea of examining the European telecoms markets in detail compared to other relevant jurisdictions. Often, discussions are based on facts and figures that suit different market positions, without the ability to verify them. The policy debate at EU level would benefit from more reliable data, including operators' data on return on investment, investment intensity, investment per capita, network coverage, and quality of service for fixed and mobile connectivity. While Europe appears to perform well in terms of

prices, recent data show that European citizens, particularly in rural areas, do not benefit from the speeds and quality that citizens in other regions of the world already enjoy.

Moreover, telecom operators in Europe are underperforming in terms of market capitalisation, and former pan-European operators are retreating into national markets. Understanding the reasons for the low market capitalisation of European telecoms, currently targeted by either private equity or "new" money, could help identify the regulatory and competition policy changes needed in the sector.

GSMA supports the preparation of such a report, which needs to reflect current market realities with 5G and convergence. As the largest association representing the European mobile sector, GSMA remains open to engaging with BEREC on this workstream by sharing relevant data and other regulatory information. This engagement should ideally take place before the publication of the draft report.

BEUC welcomes the work on this report, which shows how changes in telecommunications markets and value chains are transforming the communications ecosystem. BEUC encourages BEREC to consider the impact on end-users as a central element of this report, including how EU end-user rights and quality of service compare to other jurisdictions.

BEREC appreciates the support expressed by stakeholders for the development of this workstream. According to the planned schedule, BEREC confirms that the draft report will be available for public consultation in Q1 2026, and the final report will be published in Q4 2026. The draft report will benefit from a public consultation period, allowing both BEREC and stakeholders to align their views and expectations regarding this important activity.

Regarding the level of ambition, BEREC notes stakeholders' requests and will take them into account as far as possible. While it would be desirable to cover in detail as many areas of interest as possible – such as the cost and speed of network rollout, investment intensity, and the impact of ECN/S on end-users – BEREC must balance the depth of the assessment and the focus of the report with the various aspects it could examine. Therefore, after analysing data sources and the availability of information, BEREC believes it is more valuable to focus on key issues of great relevance for the sector, rather than dispersing attention across too many topics, which could result in an unclear picture or conclusion. In any event, stakeholders will have the opportunity to express their views on the specific aspects analysed in the draft report once it is approved for public consultation.

In particular, regarding "the impact on end-users as a central element of this report", BEREC confirms that the report will include a comparison of some of the most relevant QoS parameters across several jurisdictions, while the topic of access to land and lease aggregation will not be covered.

> Concerning the EU data and the way in which it will be presented in the Report, BEREC confirms that, when deemed appropriate, the top EU performers will be highlighted separately in order to draw a correct picture of the current state.

1.3. BEREC Opinion on the Recommendation on relevant markets susceptible to ex ante regulation

ecta keenly looks forward to BEREC's Opinion, following the welcome contents of BEREC's input to the EC public consultation held in 2025. ecta also asks BEREC to organise an external stakeholder workshop on potential changes to this EC Recommendation, as well as potential changes to its status. This workshop should be held in Q1 2026.

Vodafone supports BEREC's efforts on the Recommendation of relevant markets. Vodafone's view is that, despite technological progress, infrastructure competition in fixed broadband remains limited, with incumbents controlling most VHCN access and retail shares often exceeding 40%, enabling exclusionary practices. Removing Markets 1 and 2 from the Recommendation would be premature, as regulatory stability is critical to safeguard investment incentives and prevent re-monopolisation during the transition to fibre networks. According to Vodafone, in some countries, past deregulation shows that eliminating SMP obligations can lead to higher prices, reduced service quality, and diminished competition. Most NRAs continue to support retaining these markets in the Recommendation, recognising their importance for ensuring fair access and competitive outcomes.

Connect Europe encourages BEREC to support efforts to eliminate the remaining markets still deemed susceptible to ex ante regulation, to better reflect current market conditions and ensure a regulatory framework aligned with today's competitive realities.

Connect Europe further encourages BEREC to support a shift away from outdated SMP-based frameworks. There is a need for a fundamentally reformed regulatory framework that focuses only exceptionally on addressing any remaining challenges in an agile and proportionate manner, supporting investment and the achievement of the digital decade targets. As a consequence, the EC Recommendation on Relevant Markets should be repealed and SMP regulation abandoned, as SMP-based regulation is increasingly unfit for purpose.

MVNO Europe has provided a substantive response to the European Commission's targeted consultation on this topic and has examined BEREC's published input to the targeted consultation. MVNO Europe expects BEREC, when called upon to provide a formal Opinion, to confirm the continued relevance of the three criteria test for market definition and to take a strictly technology-neutral and market-neutral approach, in particular not to preclude the application of the Significant Market Power regime to mobile and wireless markets.

This is of crucial importance today for the EU Member States in which the market is not delivering fit-for-purpose wholesale access to mobile and wireless networks, and it may

become even more important if further consolidation of network operators is permitted or encouraged by changes to EU merger control guidance and/or sector-specific regulation.

BEUC especially welcomes BEREC's intention to contribute to the review process of the Recommendation on relevant markets susceptible to ex ante regulation, considering the European Commission's upcoming Digital Networks Act proposal. Given the potential impact of the EU telecoms rules review on the current national regulatory approaches of NRAs and the potential negative consequences for consumers, BEREC's expert, independent opinion is a key contribution to this debate.

BEREC appreciates stakeholders' support for the delivery of the Opinion. BEREC takes into account stakeholders' differing perspectives on the necessity of maintaining or, by contrast, repealing SMP regulation in its current form. However, BEREC emphasises that the subject will be thoroughly assessed from technical, legal and administrative perspectives, based on the NRAs' over 20 years of expertise. BEREC's Opinion will reflect this balanced analysis.

Regarding the request to organise an external stakeholder workshop on the revision of the Recommendation on relevant markets, BEREC considers such an action useful and will include the organisation of such a workshop in the final BEREC Work Programme 2026. However, its timing cannot be determined at this stage due to uncertainties.

1.4. External Workshop on migration and copper switch-off in light of the DNA

ecta appreciates that BEREC explicitly acknowledges its request, made in response to several previous consultations, for BEREC to provide more lessons learned and guidance on the copper migration and switch-off process. ecta and its members wish to participate actively in the planned workshop.

Vodafone has supported BEREC's ongoing work on copper switch-off, which remains one of the most significant topics in today's telecommunications markets. Previous contributions by BEREC, such as the Report on Copper Switch-off, have been highly informative and have provided a comprehensive overview of the diverse situations across Member States. Vodafone appreciates that BEREC plans to organise an external workshop on migration and copper switch-off, as suggested in our contribution to BEREC's Work Programme. Vodafone would like to emphasise the importance of involving all relevant industry stakeholders in these discussions, including access-seekers from different Member States and of different sizes. The learnings from the workshop could contribute to a toolbox of best practices.

Connect Europe notes that BEREC mentions its goal of supporting NRAs in their work regarding migration to fibre networks and copper switch-off, while balancing the incentives to carry out this migration. In this regard, the work programme should place more explicit focus

on creating incentives for investment in fibre infrastructures and allow operators sufficient flexibility to phase out their legacy networks.

BREKO welcomes BEREC's efforts to establish a coordinated approach to managing the transition from legacy copper networks to FTTH. This discussion is particularly timely in Germany, where the Federal Ministry for Digital and State Modernisation (BMDS) has recently published a framework paper ("Eckpunktepapier") outlining key principles for copper-to-fibre migration. An important element of this process is the need for a rule-based migration mechanism that goes beyond the principle of non-discrimination. This framework should empower the National Regulatory Authority (NRA) to initiate a switch-off procedure under clearly defined conditions and within a specified timeframe, thereby preventing strategic or discriminatory switch-off behaviour by the SMP operator. This possibility, outlined in the BMDS paper, represents a vital prerequisite for a successful copper-to-fibre migration in the German market.

The BMDS paper also introduces an additional idea to ensure a non-discriminatory transition by allowing third-party operators to request a copper switch-off under the supervision of the NRA, provided that the necessary conditions, such as adequate fibre deployment and the availability of alternative wholesale access products, are met. BREKO would strongly welcome BEREC's involvement in promoting a rule-based copper-to-fibre migration process, particularly in Member States where such a framework is necessary for a successful transition.

FTTH Council Europe notes that BEREC's work on the external workshop on migration and copper switch-off in light of the DNA is important, and the planned external workshop and ongoing work on migration and copper switch-off are welcome steps towards a coherent approach for managing the transition. The market transition must be managed to avoid fragmentation and ensure fair competition as legacy networks are replaced by FTTH and 5G/6G. In particular, a non-discriminatory switch-off process plays a vital role in this context. Guidance and the sharing of best practices are essential to avoid bottlenecks and protect consumer choice.

BEREC expresses its appreciation to the respondents for their support regarding the decision to hold a workshop on copper switch-off in 2026. BEREC welcomes the suggestions on the content and notes them for later stages of the project. At this stage, however, BEREC believes that flexibility should be maintained to allow adaptation of the content to the DNA proposal from the Commission once it is released.

1.5. BEREC Report on the application of fair and reasonable pricing within the SMP framework

ecta considers it useful that BEREC intends to compile an in-depth review of the interpretations and applications of fair and reasonable pricing within the SMP framework across Europe, notably with reference to wholesale-only operators (Art. 80 EECC), the

application of which remains limited to date. That said, there is a real concern that the concept of fair and reasonable pricing (which is also prominent in the Broadband Cost Reduction Directive and the Gigabit Infrastructure Act) could be interpreted in very divergent ways in EU Member States, and that its promotion (in both an SMP context and a GIA context) will only lead to various complex forms of departure from the underlying real economic costs. Therefore, a BEREC Common Position (not only a Report) would be most welcome to ensure regulatory certainty and harmonisation.

Vodafone shares BEREC's preliminary assessment that a report reviewing the interpretations and applications of fair and reasonable pricing obligations within the SMP framework across Europe might provide valuable insights. In this context, BEREC further points out that comparisons with other frameworks, such as the GIA and BCRD, could also be included to explore potential differences in how fair and reasonable pricing is interpreted in other regulatory contexts. Vodafone wishes to highlight that symmetric regulation and ex-post competition enforcement are inadequate to tackle entrenched dominance. Only SMP-based regulation, in conjunction with the GIA, can ensure fair access, investment confidence, accelerated infrastructure rollout, and competitive outcomes. Both approaches should therefore not be intertwined. Vodafone believes that a strict differentiation between symmetric regulation under the GIA and ex-ante regulation under the SMP framework should be maintained, and BEREC should be very careful in extracting learnings on fair and reasonable pricing from one regime to the other.

BREKO considers that ex-ante regulatory measures continue to play a crucial role in supporting the deployment of fibre networks. This is particularly relevant in the German market, where fibre coverage has only reached 50% of homes passed this year. BREKO therefore encourages BEREC to advocate for the retention of the existing SMP framework, particularly in markets where fibre deployment is still lagging. Maintaining SMP ex-ante regulation is essential if the EU is to achieve the Digital Decade connectivity targets.

The FTTH Council Europe will be happy to work on and contribute to this work item; however, there is a risk that this provision becomes a backdoor to price regulation rather than, as intended, a protection against excessive pricing.

BEREC appreciates the feedback received from stakeholders. BEREC takes this opportunity to highlight that the Report will focus on the interpretation of fair and reasonable pricing under the SMP regime. While BEREC is aware of the complementarity of the regulatory provisions specific to the ex ante asymmetric and symmetric approaches, as well as the possibility of ex post interventions, it considers that, if possible, the Report would benefit from a comparison with the approach under GIA, for example. BEREC will explicitly highlight the different perspectives, taking care not to dogmatically "extract learnings […] from one regime to the other".

Finally, while BEREC agrees that a common position on this topic would be helpful, the relaxation of pricing obligations under the SMP framework is a relatively new phenomenon,

which BEREC plans to clarify with this Report. Therefore, BEREC considers that the time is not yet ripe for such a common position, but, depending on the findings of the current Report, it will consider the possibility of a follow-up in the future.

1.6. BEREC Report on access conditions to state-aid funded networks

ecta warmly welcomes BEREC's intention to compile this report. It is essential that the BEREC report is firmly based on the requirements established by the 2023 EU Broadband State Aid Guidelines, and that BEREC does not hesitate to indicate potential departures from these Guidelines in Member State, NRA, or operator practices. ecta does not understand why BEREC is proposing that there should be no public consultation on this BEREC deliverable, and asks BEREC to organise a public consultation on a draft.

Vodafone agrees with BEREC on the importance of terms and conditions for accessing state-aid funded FTTH/B networks for the future development of competition in these areas. In this context, BEREC will develop an overview of NRAs' approaches to evaluating the appropriate wholesale access conditions to fixed state-aid funded networks from an economic and technical perspective, accompanied by details on price determination for active and passive services.

GSMA believes that the report could be enhanced through engagement and consultation with industry stakeholders and calls for a public consultation on this topic.

BEREC thanks stakeholders for the positive feedback. Regarding the request to hold a public consultation on the draft Report on access conditions to state-aid funded networks, BEREC welcomes the proposal and agrees to adapt the project timeline to include a public consultation. The draft Report will therefore be published for public consultation in Q3 2026, with the final version to be delivered in Q1 2027.

1.7. BEREC contribution to European Commission Guidelines on Access to existing physical infrastructure according to Art. 3 (13) of the Gigabit Infrastructure Act

ecta has responded to the targeted EC consultation on this topic and asks BEREC to take due account of ecta's contribution, which focuses on the position of public sector bodies and entities granted rights to execute public sector mandates.

Vantage Towers states that the availability and timeliness of power grid connections for new mobile tower sites remain among the most persistent barriers to achieving Europe's connectivity targets and are directly relevant to BEREC's work on implementing the Gigabit

Infrastructure Act. Electricity is the essential input powering mobile networks, and without timely grid connections, the pace of digital infrastructure deployment is severely constrained.

In several Member States, Vantage Towers has experienced that obtaining such electricity connections can take up to two and a half years, mainly due to limited coordination between telecommunications operators and distribution system operators (DSOs). Addressing this situation requires stronger cross-sector cooperation and coherent guidance between telecom and energy regulators. BEREC is uniquely positioned to highlight this interdependence in its work on GIA implementation and to promote best practices for coordination at national level, ensuring that energy and telecom infrastructure development are planned in parallel.

Connect Europe believes that guidance should retain the focus on the Regulation's underlying objective: faster and broader Very High-Capacity Network (VHCN) deployment through improved, more efficient cost structures. For this reason, bottlenecks such as pricing or refusals and unjustifiably protracted negotiations should be duly addressed.

BEREC notes the respondents' positions and their valuable contributions based on their market experience. BEREC will consider these points when cooperating with the Commission on this workflow. However, the final content of the guidance will remain at the Commission's discretion.

1.8. Ad hoc work to support information exchange on 5G private networks, direct-to-device satellite communication, phaseout of 2G and 3G mobile technologies, and hybrid networks

EENA welcomes BEREC's decision to continue supporting capacity-building workshops on the topics of the 2G and 3G phaseout and direct-to-device satellite communications. Particular focus should be given to the impact of the 2G/3G phaseout and direct-to-device satellite communications on emergency communications. It may also be beneficial to undertake ad hoc work to consider the impact that advances in artificial intelligence will have on emergency communications.

EENA recommends that BEREC undertake specific ad hoc work to address interoperability challenges for emergency communications over IMS. This could involve dialogues between representatives of national regulators and mobile network operators to discuss and identify solutions.

EENA welcomes BEREC's decision to consider ad hoc work on direct-to-device communications in 2026. According to EENA, it is critical that number-based direct-to-device services comply with the existing rules for emergency communications in Article 109 EECC, wherever technically feasible. Certain emerging practices in bringing this technology to end users, such as directly integrating direct-to-device connectivity into certain handsets without involving a terrestrial mobile network operator, may also have disruptive impacts. EENA

recommends that BEREC hold workshops to assess how this technology will affect emergency communications.

ecta and its members have a clear interest in each of these topics. Therefore, ecta requests to participate in any BEREC internal or external workshop, to be afforded the opportunity to express stakeholder views and positions on these matters.

Apple welcomes BEREC's intention to study direct-to-device (D2D) satellite communication and hybrid networks combining terrestrial and non-terrestrial components. These developments will expand connectivity to underserved areas, improve resilience, and enable safety-critical services such as emergency messaging. Apple supports a technology-neutral approach to D2D communications that allows integration of non-terrestrial networks (NTN) within existing mobile standards (3GPP Rel-17 and beyond). Harmonised and flexible spectrum frameworks are essential to ensure that D2D services can operate seamlessly across the EU while maintaining user safety, privacy, and interoperability.

Apple strongly supports BEREC's recognition of the importance of unlicensed and shared spectrum access and hybrid connectivity solutions. Licence-exempt wireless access systems (WAS/RLAN) play a key role in global connectivity, complementing licensed mobile networks and driving innovation in devices and services. Extensive technical studies have shown that WAS/RLAN systems can coexist with incumbent fixed and mobile services when appropriate conditions (e.g. power limits, dynamic interference mitigation) are applied. This record supports the case for regulators to continue enabling licence-exempt access under spectrum sharing models, which deliver high performance and cost-effective connectivity to consumers and enterprises.

To this end, Apple encourages BEREC and national regulators to support spectrum policy that recognises the efficient coexistence capabilities of WAS/RLAN and avoids disproportionate constraints on licence-exempt use in favour of licensed systems based solely on unsubstantiated future capacity projections.

Vantage Towers emphasizes the importance of ensuring that local deployment frameworks for small-area wireless access points (SAWAPs) operate effectively. Implementation of Article 57 of the EECC remains inconsistent across Member States. Persistent obstacles, such as limited municipal awareness, restrictive technical definitions, and lack of access to power or fibre connections, continue to slow network densification and urban connectivity improvements.

The current 10-watt power limit and the overly narrow definition of "small area" restrict the use of advanced small-cell equipment and significantly reduce deployment efficiency. Many local authorities remain unaware of their obligations under Article 57 EECC, and limited access to power and fibre connections further hinders the reuse of urban furniture. Vantage Towers therefore supports revisiting the power threshold and equipment size parameters to reflect technological realities while maintaining proportionate safeguards for urban environments.

Furthermore, Vantage Towers encourages BEREC to include a dedicated workstream on SAWAPs in its 2026 Work Programme.

MVNO Europe notes that companies which have invested in the capabilities required to be a full MVNO/MVNE also possess relevant expertise for the deployment and management of private 5G networks, and their interworking with public mobile networks and public mobile communications services. MVNO Europe therefore requests to be involved in all BEREC workshops and other activities considered under this heading of the draft WP2026, especially where these concern market-shaping aspects of relevant spectrum assignment, potential competition, and cooperation between terrestrial and satellite operators.

GSMA supports information exchange on these topics, as some are just emerging and can benefit from broad stakeholder engagement. Any work carried out in these areas should include consultation with industry stakeholders.

DSA believes that private 5G networks deliver enterprise-grade performance and reliability through dedicated spectrum use, supporting customised quality of service (QoS), comprehensive security, and wide-area seamless coverage. They are ideal for large campuses, industrial sites, and mission-critical applications, delivering low latency and high throughput where it matters most.

Technology neutrality is essential to ensure consumers have access to a diverse ecosystem of interoperable and cost-effective solutions that best meet their individual connectivity needs. KPIs should capture not only network speed and coverage but also ease of setup, interoperability between different indoor technologies, support for seamless handovers, equipment affordability, and market availability. By providing clear, standardised information and performance metrics about end-to-end connectivity quality, regulators and providers can empower consumers to make informed decisions, foster healthy competition, spur innovation, and help bridge the digital divide across Europe.

BEREC thanks EENA, Apple, GSMA and ecta for their support for the internal work item regarding the proposed work on direct-to-device satellite communication. BEREC thanks EENA, Apple, GSMA, and ecta for their support for the internal work item regarding the proposed work on direct-to-device satellite communication. BEREC appreciates the support expressed by EENA, ecta, GSMA, and MVNO Europe regarding the proposed work on 2G/3G phase-outs. BEREC also appreciates the support provided by MVNO Europe, ecta, and GSMA concerning the proposed work on private networks. Furthermore, BEREC thanks Vantage Towers and the DSA for their views and suggestions.

In all the topics mentioned above, BEREC recognises the importance of optimising the reachability of emergency services and, where possible, of maintaining a standardised and interoperable approach across all existing and emerging technological channels. BEREC is grateful for the offers from several respondents to participate in discussions at future BEREC workshops and fully intends to invite a selection of relevant stakeholders to one or more of these sessions. However, how BEREC will implement this in 2026 will depend largely on developments in related areas and on the resources available at that time.

BEREC recognises the importance of coexistence and complementarity between licensed and licence-exempt wireless access ecosystems. Traditionally, NRAs focus primarily on licensed

wireless access for public services, as licence-exempt wireless access is mainly used in private and consumer networks providing indoor and local outdoor connectivity, in particular using Wi-Fi. However, with the evolution of hybrid networking, the potential uptake of private networks and neutral hosting, and the possible need for interworking or connectivity between public and private networks, BEREC may in the coming years need to assess where the existing regulatory paradigm remains future-proof and where it does not. As part of such an effort, additional related topics may also need to be considered – for example, whether it is useful or necessary to include indoor connectivity metrics, and whether certain solution ecosystems (such as SAWAPs) require further regulatory attention. These elements could form part of BEREC's future work.

2. Strategic priority: Supporting competition-driven and open digital ecosystems

Connect Europe supports BEREC's efforts to improve the functioning of digital markets. Connect Europe is fully committed to ensuring contestable and fair markets in the digital economy. In this context, the European Commission's upcoming proposal for a Digital Networks Act presents a unique opportunity to address existing challenges in the telecoms market. This instrument has the potential to serve as an important enabler for a functioning European single market, outlining the sector's long-term vision and addressing the currently high levels of market fragmentation. Connect Europe encourages BEREC to endorse the initiative's forward-looking approach, particularly regarding private investment in digital infrastructure.

BREKO fully supports BEREC's view that open and competitive markets are essential for innovation and consumer welfare. However, BREKO believes that market consolidation should occur naturally through competitive dynamics rather than political intervention. Therefore, BREKO considers that the upcoming review of the EU Merger Guidelines should not undermine competition or create conditions that could lead to new tendencies towards re-monopolisation in the market. In Germany, competitive pressure from alternative network operators has primarily driven progress in fibre deployment, demonstrating the importance of fair market competition with diverse participants.

BEREC welcomes the recognition by Connect Europe and BREKO of the importance of promoting contestable and fair digital markets, to which BEREC is committed.

BEREC agrees with BREKO that competitive markets have proven to enhance consumer welfare.

BEREC shares Connect Europe's view that challenges in the telecoms market should be considered in the upcoming framework, particularly in the Digital Networks Act.

2.1. BEREC contribution to the implementation of the Data Act

ecta has expressed support to BEREC for the role of NRAs, particularly regarding switching between data processing services, interoperability, and IoT (connected devices). ecta requests that BEREC actively involve stakeholders such as ecta in its work, as this is not evident from the description of the work item.

GSMA welcomes BEREC's intention to support the implementation of the Data Act, but notes that several relevant issues still require clarification. Regarding the scope, there appears to be an overly broad interpretation of "Connected Product." This interpretation includes any item that collects or generates data on its use or environment, can communicate such data, and whose primary function is not the storage, processing, or transmission of data for third parties. GSMA believes that routers, modems, femtocells, Wi-Fi amplifiers, set-top boxes, and similar

electronic communication and audiovisual equipment, which enable communication flows necessarily involving third parties (e.g. ISPs), should be excluded from the definition of "Connected Product."

On the topic of switching data processing services, there is a lack of specific provisions or guidance for cases where services are resold (e.g. when operators resell hyperscalers' products or services to their customers). It is important to clearly define roles and responsibilities, and to explain how switching obligations apply in practice across the value chain. Furthermore, clear guiding principles are needed for the Business to Government (B2G) data sharing framework. GSMA also supports the creation of a clear, transparent, and mandatory EU-wide compensation scheme to underpin emergency B2G-related requests.

> BEREC welcomes the support of ecta and GSMA for this work item. BEREC plans to contribute to the implementation of the Data Act in several ways and will engage with relevant stakeholders to gather their input, especially regarding Chapters VI and VIII of this regulation.

2.2. Further Guidance on 5G Network Slicing

ecta welcomes BEREC's work in this area, expecting it will positively contribute to the development and monetisation of 5G network slicing.

Apple notes that BEREC's forthcoming work on network slicing and its compatibility with the Open Internet Regulation is timely. Apple encourages a balanced interpretation that allows innovative, differentiated services, such as low-latency AR/VR or industrial applications, while ensuring end-users continue to enjoy open and non-discriminatory access to the Internet. Network slicing should be treated as a technical enabler of service differentiation, not as a mechanism for user-level discrimination. Apple supports BEREC's continued engagement with industry stakeholders to clarify these principles.

Connect Europe notes that a more future-proof approach to how the OIR will be applied to nascent use cases is required to create a stable regulatory environment. This will allow the development of concrete use cases based on 5G network slicing and, in the mid-term, the implementation of standardised APIs and the 'Network as a Service' vision, further justifying future investments in 5G networks. Regarding 5G network slicing, it is also important to highlight that the enabled services will require further optimisation and specific treatment. Guarantees of the capacity and quality of internet access are essential for safety and mission-critical use cases. In addition, the regulatory asymmetry between ISPs and digital players in the context of the OIR, and more specifically regarding its provisions on traffic management, needs to be addressed to create a level playing field.

MVNO Europe notes that BEREC's specific attention is needed to ensure that API access and network slicing, both of which can be welcome technical innovations, are not positioned and

accepted as a way to discriminate between what the MNO self-supplies or supplies to specific end-users, whilst withholding it from MVNOs, and as a substitute for wholesale MVNO access. MVNO Europe wishes to reiterate and put on record that no MVNO has, to date and to its knowledge, been offered wholesale network slicing by a host MNO, and that API access and network slicing are in no way to be considered a substitute for fit-for-purpose wholesale mobile network access.

BEUC notes that, as already outlined in BEUC's response to BEREC's call for input on the Roaming Regulation, the use of network slicing to create multiple virtual networks, each tailored to specific needs to provide customised connectivity, services, and Quality of Service (QoS) differentiation, also raises important questions regarding net neutrality. BEUC cautions regulators to ensure that the current regulatory exemptions allowing network slicing remain conditional on the provision of critical services. Telecom operators should not be allowed to instrumentalise the opportunity for network slicing to pursue commercial interests. This would otherwise open the door to commercial practices that ultimately discriminate against Internet traffic and further undermine the open internet.

> BEREC notes the interest generated by this proposed deliverable and is fully committed to ensuring that the process is informed by the views of the entire stakeholder community.

2.3. BEREC contribution to the implementation of the Digital Markets Act

Regarding the Digital Markets Act, Connect Europe believes it represents a significant step towards fostering fair and contestable digital markets. However, while well-intentioned, it has not yet realised its full potential. Implementation has been hindered by narrow enforcement of key provisions, limited enforcement capacity, and a lack of responsiveness to emerging technologies. Expanding the list of core platform services to avoid regulatory blind spots, and addressing the narrow enforcement scope – particularly regarding interoperability requirements – will help the DMA become more effective.

MVNO Europe wishes to remind BEREC that Operating Systems, under the control of designated Gatekeepers in application of the DMA, can impose restrictions on ECN/ECS providers' ability to provide access to services and network functionalities. BEREC's proposed workstream is silent on Operating Systems issues, which concerns MVNO Europe, given that serious problems persist. These issues were acknowledged by BEREC in a report dated 3 October 2024.

MVNO Europe expects the initiatives forming part of this BEREC workstream to result in concrete improvements for those MVNOs that continue to face serious problems. For at least the past decade, Operating System functionalities, notably on iOS devices, have been wilfully withheld by Apple where the service provider has not entered into a commercialisation

agreement for Apple devices (the so-called "Carrier Partner Agreement"). Based on the above, MVNO Europe asks BEREC to follow up on Operating System issues as part of its active participation in DMA High-Level Group meetings, opinions, reports, workshops, knowledge-building, and related activities throughout 2026.

BEUC supports BEREC's ongoing contributions to the implementation of the Digital Markets Act (DMA). The DMA remains a vital element of the EU's digital and competition policy toolkit. At a time when the implementation of the DMA is being challenged by designated gatekeepers, which could directly impact consumers' rights to fair, open, and interoperable services, it is essential that BEREC further engages in consultations with all relevant stakeholders when preparing its analysis and interventions, through dedicated workshops and discussion fora.

> First, BEREC would like to highlight that the European Commission is the sole enforcer of the Digital Markets Act and its obligations.
>
> BEREC's formal role regarding the DMA concerns the opinions it delivers to the European Commission on the implementation of Article 7, as well as its participation in the High-Level Group (HLG). Under Article 7, BEREC has already delivered three opinions to the European Commission concerning the interoperability of messaging services provided by the designated gatekeeper Meta (BoR (24) 19; BoR (24) 78; BoR (25) 21). In the HLG, BEREC is actively contributing to the three subgroups on interoperability, data-related obligations, and AI.
>
> Moreover, BEREC has contributed to discussions on the review of the DMA and responded to the European Commission's consultation on the matter (BoR (25) 119), proposing concrete solutions to improve the regulation.
>
> BEREC continues to monitor and analyse developments in the digital markets area and the impact and effects of practices implemented by large online platforms, which may include issues related to operating systems.

2.4. BEREC report on the impact of artificial intelligence on competition dynamics, internet openness and end-users' rights

EENA proposes that BEREC undertake ad hoc work in 2026 to address the use of artificial intelligence in emergency communications. EENA's work on this topic has identified several sector-specific challenges for emergency communications. These include the need to protect sensitive emergency communications data and the need to optimise networks for emergency communications and during crises. Advances in artificial intelligence have continued globally, with AI now integrated into emergency communications systems in some countries. Ensuring that AI advances, rather than undermines, public safety during emergencies should therefore be a key topic of discussion for BEREC in 2026.

Connect Europe notes, with regard to the Cloud and AI Development Act (CAIDA), that BEREC's support for the Commission's efforts to establish a regulatory framework promoting European data and cloud sovereignty by fostering trusted European cloud services for critical use cases would be instrumental. This will be a crucial enabler for strengthening Europe's cloud and computing infrastructure.

BEUC notes that artificial intelligence (AI) continues to develop rapidly and welcomes BEREC's commitment to further analyse the impacts of AI on competition, internet openness, and end-user rights. As the use of AI solutions continues to grow across sectors, including telecoms, the protection of end-user rights becomes increasingly important. As consumers are more exposed to such technology daily, it is essential that consumer protections keep pace with the increased risks.

BEUC shares BEREC's concern that AI may "affect the overall user experience on the internet" as it could directly influence the way users' access online content and services, potentially affecting their freedom of choice. There are clear risks that end-users will be subjected to AI systems and exposed to automated decision-making without clear, accessible ways to request explanations and take legal action. Without this, consumer protections are further weakened and both consumers and businesses are left with legal uncertainty. BEREC should ensure that clear rules provide appropriate safeguards for end-users.

BEREC's further analysis is critical to provide an expert, evidence-based assessment of AI usage and its impact on markets and consumers, based on sound research and market analysis. To support this important work, BEUC recommends that BEREC consider organising additional stakeholder workshops to provide input into its drafting. BEUC welcomes the opportunity to contribute to this exercise with insight from the consumer perspective and reiterates its availability to engage in these discussions.

> BEREC welcomes BEUC's support for its work on this workstream. BEREC plans to organise meetings and workshops with relevant stakeholders to gather their feedback and insights on this topic, and therefore notes positively BEUC's availability to collaborate on this work.
>
> Regarding the point raised by EENA, BEREC notes that it is not within the scope of the current report, but remains available to further explore the topic in the context of events and meetings dedicated to stakeholder engagement.

3. Strategic priority: Empowering end-users

ecta agrees with the work items identified by BEREC, has no particular comments to add, and thanks BEREC for enabling ecta's participation in the BEREC-BEUC joint workshop on end-user rights. Enabling wider participation is good practice and should continue in future workshops. ecta asks BEREC to be systematically mindful, when referring to end-users and their empowerment, of the differences between consumers (B2C markets) and business users (B2B markets, including services provided to public administrations), in particular to: avoid NRAs imposing undue and impracticable obligations on providers serving only B2B customers, and to ensure that the specific issues faced by operators focused on serving B2B customers are fully taken into account in all relevant regulatory proceedings.

The multi-company response notes that most end-users currently bear responsibility for distributing their fixed connectivity throughout their premises, leveraging Wi-Fi, meshed Wi-Fi, and powerline communication technologies (among others) to distribute internet connectivity throughout their homes and businesses. Investments in fibre and mobile infrastructure without adequate availability of local connectivity distribution technology and mechanisms are similar to investing in motorways without access ramps and local roads. KPIs should be adopted to indicate how easily end-users can distribute gigabit connectivity within their premises. It is important to highlight the role of technology-neutral options for indoor connectivity, including the performance, affordability, and availability of equipment that can connect to any access infrastructure. This supports consumers in making informed decisions in a competitive market by increasing transparency regarding the quality of their full end-to-end connectivity.

Connect Europe considers it important to recognise that European end-users are already the most well-protected in terms of sector-specific regulation, which has been layered with new requirements on providers for more than three decades. For BEREC's 2026 Work Programme, Connect Europe finds it necessary for BEREC to provide more clarity on the much-needed examination of sector-specific consumer protection rules, including removing obsolete requirements and ensuring general alignment with horizontal consumer protection within the EU, in line with the European Commission's simplification objectives.

For more than a decade, consumers' uptake of various number-independent services (iMessage, Snapchat, etc.) demonstrates that regulators and consumers have very different perspectives on what is needed regarding transparency and information requirements. We encourage BEREC to increase transparency and ensure that their own information level is balanced, reflecting all relevant parties in their work.

Twilio is committed to BEREC's objective to ensure transparency and protect end-users as markets evolve. At the same time, we urge BEREC to recognise that B2B electronic communications services are fundamentally different from consumer-facing (B2C) offerings. Rules designed for traditional telecom or B2C services should not be imposed as they are on B2B providers, whose business relationships, technical roles, and customer expectations differ markedly, especially in cloud-based communications. B2B service providers typically do not process traffic or access end-user data in the same way as retail operators owning and running significant infrastructure networks. Requirements around transparency, reporting,

data protection, security, and consumer protection must be right-sized for B2B contexts and ensure there is no duplication or multiplication of requirements from other EU and national legislation.

As already stated, Twilio encourages BEREC to explore ways to further engage with B2B providers to discuss with NRAs the opportunities presented by the sector and the current impediments to realising them.

BEUC welcomes BEREC's commitment to continue prioritising workstreams aimed at empowering end-users. BEUC and its members especially appreciate the ongoing collaboration with BEREC over the years and the recent opportunities to contribute to BEREC's work and participate in external and joint workshops on key consumer topics, including recent workshops on the review of end-user rights following Article 123 of the EECC, and the recent joint workshop on end-user rights.

Following the European Commission's announcement of its intention to review the EECC, BEUC regrets that end-user rights have been conspicuously absent from the centre of current policy discussions. With the proposal of the upcoming Digital Networks Act, expected to be presented in December 2025, BEUC welcomes BEREC's commitment to keeping this vital topic on the agenda at this critical juncture, and reiterates its commitment to support this work wherever possible.

BEREC thanks stakeholders for their views and general support for the work items included in the Work Programme under Strategic Priority 3: Empowering end-users. BEREC remains committed to its objective of ensuring transparency, protection and empowerment of end-users as markets evolve. This approach will be considered not only through the projects under this strategic priority but also in forthcoming discussions in the context of the EECC review and the preparation of the DNA.

3.1. BEREC report on switching and termination of contracts

BEUC notes that the switching process and contract termination are critical aspects for consumers; opaque termination procedures and lengthy contractual documents remain a significant issue for consumers across the EU. BEUC appreciates BEREC's positive reference to the November 2022 joint workshop with BEUC and reiterates its availability to contribute to this process. In addition to the adoption and publication of the report, BEUC suggests organising an external stakeholder workshop to discuss the findings and put forward recommendations for best practices that telecoms providers and NRAs can implement.

> BEREC appreciates and thanks BEUC for supporting its work on this aspect of the work programme. It is worth noting that BEREC also engages with stakeholders through the debriefing session, where the outcomes of the Report are expected to be presented.

3.2. BEREC-BEUC Joint workshop on end-user rights

BEUC greatly appreciates the ongoing collaboration with BEREC on the important issue of end-user rights. We thank BEREC for jointly organising another successful edition of this workshop in October 2025, and welcome the significant contribution of this event in placing consumer rights at the centre of the debate on the forthcoming review of the regulatory framework, with productive discussions on quality of service, coverage, information, and marketing practices. Given the positive feedback from this edition, BEUC is ready to continue this collaboration and suggests that this initiative be extended into 2026 with a new iteration of the joint workshop, to be jointly developed and hosted by BEREC's end-user rights working group and BEUC.

> BEREC appreciates and thanks BEUC for its support of this aspect of the work programme. BEREC has included the workshop in the work item described in chapter 3.3 of the Work Programme, where BEUC, as a valuable partner, will be invited to contribute to the discussions.
>
> It is worth mentioning that, in light of anticipated legislative changes and the need for a balanced distribution of work, BEREC has structured the Work Programme accordingly. At the same time, BEREC will ensure that sufficient resources are available to deliver all planned tasks as well as any ad hoc activities that may arise.

3.3. Workshop and Report on practices for ensuring equivalence of access and choice with respect to accessibility

EENA is monitoring the implementation of Real Time Text and Total Conversation for emergency communications across Europe and will publish an Accessibility Report Card in February 2026, outlining their state of implementation in all EAA states. This report, together with ongoing work with PSAPs and other stakeholders to improve the accessibility of emergency communications, could provide a basis for discussions within BEREC on accessibility.

> BEREC appreciates and thanks EENA for its support of this aspect of the Work Programme. The information on the upcoming publication of an Accessibility Report Card in February 2026 may be of interest to present at the workshop, which is expected to be held in the second quarter of 2026.

3.4. Implementation of the Open Internet Regulation and the BEREC Open Internet Guidelines

BEUC notes that BEREC's continued reporting on the implementation of the Open Internet Regulation remains a vital aspect of ensuring consistent application of the regulation and the overarching protection of net neutrality. At a time when private sector actors are increasing their control over key aspects of communications infrastructure, it is more important than ever that BEREC expresses its views on the state of the Open Internet in the EU.

BEUC notes that the current work programme does not include a public consultation on the report for 2026. BEUC requests that, if a public consultation is not planned, BEREC provides an opportunity for certain stakeholders to submit their input on the report.

BEREC appreciates and thanks respondents for supporting this deliverable in the Work Programme. However, as this specific task is, by its nature, a fact-sharing report, BEREC considers that a public consultation would not be appropriate or add value to the factual information in the report. As a result, there is no change to the deliverable in the final Work Programme.

4. Strategic priority: Contributing to environmentally sustainable, secure and resilient digital infrastructures

EENA welcomes BEREC's strategic focus on improving the resilience of both terrestrial and non-terrestrial communications networks, particularly during crises. Many events that cause telecommunications outages, such as storms and earthquakes, are directly correlated with increased demand for emergency services, underlining the importance of this topic for public safety. The vulnerability of telecommunications networks during certain crises, and their dependence on energy networks, became prominent issues in 2025, with large-scale outages in the west of Ireland in January 2025, and in Spain and Portugal in April 2025. Important lessons on improving the resilience of these networks have also been learned in Ukraine since 2022, which merit discussion.

ecta agrees with the work items identified by BEREC and requests that ecta is systematically invited to relevant workshops and involved in other BEREC initiatives relating to cybersecurity, resilience, combating fraud, and environmental sustainability. ecta asks BEREC to be mindful, in each of these contexts, of the costs for industry, and the fact that smaller operators do not have the same financial and human resources as the largest operators. Attention is needed to avoid unintentionally distorting competition by placing disproportionate burdens on operators.

Apple recognises BEREC's leadership in examining the environmental impact of electronic communications. Apple remains committed to its goal of carbon-neutral products and supply chains by 2030 and supports the development of evidence-based, technology-neutral sustainability metrics for digital infrastructure and devices.

The multi-company response states that high-quality indoor connectivity should ideally be provided by indoor networks such as Wi-Fi, public 5G indoors, and indoor private 5G (P5G). Outdoor-to-indoor solutions consume high levels of power to penetrate building walls for frequencies above 2–3 GHz, particularly for newer, more energy-efficient buildings. Similarly, connecting an indoor device to an outdoor network uses considerably more energy, resulting in more frequent recharge cycles, increased battery wear, and additional electronic waste. Furthermore, outdoor networks are designed to handle mainly downlink traffic (in a ratio of 9:1), so the uplink is generally a considerable limiting factor for advanced applications that require high-performance uplink connectivity.

Solutions that support seamless handover of devices between public 5G, P5G, and Wi-Fi networks (e.g. PassPoint, OpenRoaming) enable more cost-effective and environmentally sustainable high-throughput indoor connectivity. BEREC's analysis of hybrid network collaboration should include a focus on sustainability in the context of enhanced indoor coverage. To best ensure BEREC's objectives are met, the multi-company response encourages BEREC to prepare a report on gigabit connectivity indoors.

Vantage Towers encourages BEREC to include a dedicated activity in its 2026 Work Programme aimed at promoting efficient, harmonised, and data-driven EMF (electromagnetic fields) management practices within the current exposure limits. This would help ensure that EMF compliance continues to safeguard public health while also enabling more infrastructure

sharing and thus competition between MNOs, in turn supporting the EU's full connectivity and sustainability objectives. While the draft work programme includes valuable initiatives on sustainability and network sharing, notably under Section 4.1 Environmental data collection and Code of Conduct for ECN/ECS sustainability, and Section 4.3 Understanding digital technologies' sufficiency for greener networks, these sections could usefully be expanded to incorporate the issue of measurements of EMF limits and transparency of EMF data as a barrier to site sharing and network densification.

In many Member States, these EMF limits are applied using theoretical maximum power assumptions rather than real-time or measured data. This approach can lead to an overly conservative allocation of EMF, meaning that while actual emissions remain far below safety thresholds (often one hundred and fifty to two hundred times lower), available capacity is deemed exhausted on paper.

Furthermore, Vantage Towers recommends that BEREC integrates the topic of energy resilience (power outages and prolonged blackouts) into its broader work on sustainability and network security, recognising that a stable and reliable power supply is a cornerstone of resilient and secure electronic communications infrastructure.

EWIA notes that the open, neutral, and sharing-driven TowerCo model brings significant environmental benefits, as it will result in 109,000 fewer towers being built by 2030, thereby avoiding almost 4 million tonnes of CO_2 emissions – the equivalent of taking nearly 200,000 cars off the road each year. EWIA is particularly interested in and willing to engage on the following points: 1. Advancing environmental data collection on ECN/ECS and contributing to a future Code of Conduct on ECN/ECS sustainability (point 4.1 of the Draft BEREC Work Programme 2026); 2. Understanding the sufficiency of digital technologies for greener networks and ICTs (point 4.3 of the Draft BEREC Work Programme 2026); 3. Ad hoc work on reinforcing the EU's resilience capabilities (point 4.5 of the Draft BEREC Work Programme 2026); 4. For 2027 and beyond, exchanging best practices on environmental impact assessment of mobile network sharing and supporting mobile network sharing indicators (point 8.4 of the Draft BEREC Work Programme 2026).

Connect Europe notes that telecom operators are deeply committed to advancing sustainability across all dimensions – environmental, social, and economic – and are actively implementing strategies and actions to, among other things, become net zero and manage supply chains responsibly. Most of Connect Europe's members have now set net-zero targets for their direct emissions (scope 1 and 2) and also for indirect emissions across the value chain (scope 3). Thanks to these initiatives, most aim to reach net zero by 2040 at the latest.

BREKO highlights that FTTH networks offer a superior environmental profile compared to alternative technologies, and regulatory frameworks should recognise and incentivise this through the inclusion of fibre networks in the EU Taxonomy. However, sustainability standards should not create unnecessary regulatory burdens on fibre network operators, but should be proportionate and in line with the omnibus simplification package recently adopted by the EU Commission and currently debated in the EU Parliament.

Twilio strongly welcomes BEREC's collaboration with ECASEC and ENISA on important security-related issues and looks forward to the opportunity to participate in the external

workshops planned for 2026. Twilio urges caution in developing overly broad or prescriptive new guidelines and encourages BEREC and other agencies to ensure any measures reflect the evolving character of the pan-European communications ecosystem and that frameworks are proportionate, targeted, and accurately reflect the roles different actors play within the digital communications ecosystem.

DSA notes that sustainability is a foundational dimension of connectivity quality and future-proof digital infrastructure. Indoor networks such as Wi-Fi and private 5G present more energy-efficient solutions compared to solely relying on outdoor-to-indoor coverage, which requires significantly higher transmission power to penetrate building structures. Such outdoor reliance increases device power consumption, shortens battery life, and accelerates electronic waste generation – a critical environmental concern.

BEREC's evaluations of hybrid networks should comprehensively include environmental impact metrics that assess overall network power consumption, device energy efficiency, and lifecycle sustainability across infrastructure and connected devices. These metrics should be integrated alongside traditional connectivity KPIs to foster greener network design and operation.

The deployment of seamless handover technologies, such as PassPoint (Hotspot 2.0) and OpenRoaming, plays a pivotal role in enabling efficient indoor connectivity. By allowing user devices to transition smoothly among public 5G, private 5G, and Wi-Fi networks without manual intervention, these technologies minimise redundant network scanning and excessive energy use. They also facilitate higher network utilisation efficiency and enhance user experience while reducing the overall carbon footprint of wireless communications.

Early industry adoption trends of PassPoint and OpenRoaming highlight their potential to support energy-efficient connectivity in venues ranging from smart cities to enterprise campuses and hospitality environments. They enable advanced analytics that can optimise resource allocation for greater sustainability benefits. Sustainability-driven KPIs focusing on energy consumption per bit, network utilisation efficiency, device power profiles, and carbon emissions will enable regulators and network operators to target investments and innovations that align with the European Green Deal and Digital Compass objectives for climate neutrality.

By encouraging technology-neutral, interoperable, and energy-conscious connectivity solutions, BEREC can lead efforts to build resilient, future-ready digital infrastructure that delivers superior connectivity quality while minimising environmental impact.

BEREC thanks the stakeholders for their support of the strategic priority and for the content provided in this section. BEREC also expresses its appreciation for the stakeholders' willingness to cooperate on specific matters and informs them that it will take particular care to ensure that stakeholders are informed in a timely manner about all activities and opportunities for engagement, while maintaining the highest possible level of transparency.

BEREC thanks Vantage Towers for highlighting the importance of energy resilience within the broader context of sustainability and network security. In this regard, BEREC would like to

clarify that it recognises the importance of addressing the interdependence of the telecommunications and energy sectors and intends to explore this within work item 4.5.

In relation to the comments from the Multi-company response and the DSA about connecting an indoor device to an outdoor network, and other issues around the supply of connectivity solutions indoors, BEREC agrees that radio frequency coordination of outdoor networks is not designed to serve indoor networks. BEREC would be interested in advancing its understanding of the relative interoperability and compatibility issues of different industry solutions that serve the interface between indoor and outdoor and looks forward to addressing some of these issues in an invited presentation (but, format yet to be decided and only a manageable selection of content may be included so not yet clear if this would include an environmental perspective) under work item 1.11 (see also section 1.8 above). To the specific proposal that BEREC work on a set of sustainability indicators for indoor connectivity, BEREC is not clear what indicators the respondent would propose given that an EU Code of Conduct will provide guidance on sustainability of telecommunications networks and parties can voluntarily report on their sustainability footprint using a harmonised approach. Environmental aspects, including lifecycle impacts assessed through LCA (Life Cycle Assessment) seem to be included as part of the EU's Code of Conduct.

In relation to Vantage Towers proposal that BEREC include data-driven EMF management practices in the Work Programme, it is worth noting that not all BEREC members have competence for spectrum management and even fewer have competence for setting levels of, and measuring and reporting on, non-ionising radiation in their countries. BEREC maintains an information portal on the competent authorities in countries[1] and has a joint statement with the RSPG on EMF[2]. BEREC proposes a project to exchange of information on impact assessment on mobile network sharing in terms of environmental sustainability (see Work Programme 8.4).

4.1. Advancing towards environmental data collection on ECN/ECS and contributing to future code of conduct on ECN/ECS sustainability

Connect Europe acknowledges that common indicators and measurement approaches are essential to ensure consistent and transparent reporting of environmental impacts, to enable action and track progress. We are ready to continue actively contributing to the development of a Code of Conduct for the sustainability of telecommunications networks (CoC) that is practical to implement, and to continue our efforts to measure and reduce the environmental footprint of our sector. As such, the CoC is sufficient, and further assessment of the environmental footprint of the ICT sector, as suggested by BEREC in its WP, is not needed. In parallel, telecom operators have also disclosed information on their environmental performance within CSRD reporting through ESRS E1 and E5. Accordingly, Connect Europe

[1] EMF related country-specific information for Finland | BEREC
[2] BEREC and RSPG adopt joint position paper on spectrum-related EMF issues | BEREC

encourages BEREC to avoid expanding the set of sustainability indicators further, as this could increase the burden and complexity for telecommunications operators without delivering tangible progress towards sustainability objectives.

FTTH Council Europe believes that FTTH networks have a better environmental profile than alternatives; regulatory frameworks should recognise and reward this, for example, through inclusion in the EU Taxonomy. Sustainability standards should be outcome-based, and security measures should be risk-based and proportionate, ensuring that innovation and supply chain resilience are not compromised. BEREC's planned contribution to the future Code of Conduct on ECN/ECS and work on sustainability indicators are positive steps.

GSMA supports BEREC's contribution to the work on the Code of Conduct on sustainable networks. In light of the current simplification, we do not see the need for further assessment of the environmental footprint beyond the CoC. Therefore, GSMA strongly encourages BEREC not to further expand the sustainability indicators, as this would unnecessarily increase the burden and complexity for telecommunications operators without contributing to the sustainability objective. Furthermore, it should be clear that ad hoc data collection should not go beyond the indicators marked as "expected" in the recent draft of the CoC.

BEREC welcomes the positive feedback on its contribution to the Code of Conduct on ECN/ECS sustainability. Regarding the stakeholders' point about the importance of common indicators and measurement approaches to ensure consistent and transparent reporting of environmental impacts, BEREC notes that it fully shares this objective and will continue to promote harmonised and evidence-based methodologies. In response to the point raised by Connect Europe and GSMA that the forthcoming Code of Conduct for the sustainability of ECN/ECS is sufficient and that no further assessment of the environmental footprint of the ICT sector is needed, BEREC clarifies that its intention is not to duplicate or expand the Code of Conduct framework, but to complement it by facilitating transparency and comparability across Member States.

Regarding the point made by FTTH Council Europe about the superior environmental profile of fibre networks compared to alternative technologies, BEREC notes the importance of recognising and promoting technologies that contribute to long-term environmental sustainability objectives.

BEREC fully supports the statement that security measures should be risk-based and proportionate. Economic aspects of all measures are always a focus for BEREC to ensure the market remains open to investment and innovation.

4.2. Sustainable AI for greener digital infrastructures: Understanding the environmental implications of AI in the telecoms and ICT sector

GSMA welcomes BEREC's efforts to better understand the environmental implications of AI and will contribute to the public consultation on this matter. It is important to note that both the International Telecommunication Union (ITU) and the European Telecommunications Standards Institute (ETSI) are currently developing methodologies to assess the environmental impact of AI systems, using frameworks such as ITU-T L.1410, L.1480, and Life Cycle Assessment (LCA) approaches. GSMA encourages BEREC to consider this ongoing work to ensure alignment with internationally recognised methodologies and to establish a consistent baseline for collecting information and evaluating the implications of AI in the electronic communications sector.

BEREC acknowledges the importance of common and harmonised methodologies to assess the environmental impact of AI systems. BEREC will base its approach on a global initiative launched at UNESCO headquarters, which brings together experts from ISO, ITU, and IEEE, in partnership with the OECD and UNESCO. The purpose of this initiative is to coordinate the current standardisation processes launched by different standardisation bodies. BEREC will also base its work on the work carried out by ETSI and CEN-CENELEC in this area.

4.3. Understanding digital technologies sufficiency for greener networks and ICTs

GSMA notes that all efforts made in developing the Code of Conduct should be considered synergies and used as environmental information for green networks and ICTs.

BEREC notes the need to consider the efforts made in the Code of Conduct and to use them as environmental information for greener networks and ICTs, ensuring coherence and avoiding duplication of reporting.

4.4. Ad hoc work to support reinforcing EU's cybersecurity capabilities

Connect Europe notes that our sector has consistently advocated for shared responsibility in maintaining high levels of security throughout the entire telecom supply chain. In terms of cybersecurity, telecom operators have a particular duty to protect their customers from cyber

threats and are making significant investments in the security and resilience of their networks. Ensuring secure and resilient infrastructure is essential for telecoms, as they act as a cyber shield for European society.

Connect Europe wishes to emphasise that the coexistence of various European cyber risk regulations, management and reporting obligations (e.g. GDPR, NIS2, CRA, DORA, EECC, CER), together with national security requirements and different enforcement authorities, risks undermining legal certainty and consistency. Additionally, it is crucial to consider the importance of investment and single market objectives for security and resilience. Investment conditions and the ability to operate networks across borders have significant implications for operators' capacity to invest efficiently in network security.

Twilio strongly welcomes BEREC's collaboration with ECASEC and ENISA on key security-related issues and looks forward to participating in the external workshops planned for 2026. Twilio urges caution in developing overly broad or prescriptive new guidelines and calls on BEREC and other agencies to ensure that any measures reflect the evolving nature of the pan-European communications ecosystem and that frameworks are proportionate, targeted, and accurately reflect the roles different actors play within the digital communications ecosystem.

BEREC welcomes the comments. In cooperation with the NIS Cooperation Group and other stakeholders, BEREC will always make an effort to emphasise the importance of the market impacts of any measures and ensure that the market impact is considered in the relevant analysis and proposed actions.

The following rewording of the WP2026 will be made to better reflect these aspects:

"It will provide its support in enhancing cooperation and information exchange (e.g. by collecting relevant data from market players where needed), and strive for harmonised, investment- and innovation-friendly implementation of the cybersecurity legislation (e.g. by co-organising workshops, providing expert opinions and comments, and enhancing best practice sharing among the NRAs)."

BEREC welcomes the active participation of all interested stakeholders in the planned workshops in 2026.

4.5. BEREC Work for Enhancing Network Resilience

ecta finds the tasks listed in the bullet points unclear and asks BEREC to ensure that the scope and plans of this work are clear to all stakeholders.

GSMA welcomes BEREC's initiative to explore ways to contribute to strengthening the EU's resilience capabilities. Europe's digital resilience depends on secure and robust telecom

networks, and as rightly stated in the BEREC Work Programme, the security and resilience of electronic communication networks and services are of paramount importance to the well-functioning Digital Single Market.

These infrastructures support critical services such as emergency response, payments, healthcare, energy systems, and data protection. The EU telecom sector is already making significant investments in security, redundancy, and operational continuity to address an increasingly complex threat landscape. However, this effort requires a sustainable economic foundation. The profitability of the European telecom sector is at historic lows, as highlighted in the Draghi and Letta reports. A healthy and profitable European telecom sector is the best means to ensure resilient and secure connectivity. Without adequate returns, the capacity to invest in future-proof infrastructure and meet growing societal demands is at risk. Therefore, resilience in connectivity involves both technical and economic considerations.

> BEREC welcomes the comments. The text in the Work Programme has been revised for clarity. In many cases, investments in security, redundancy, and operational continuity do not have a sustainable economic foundation. For these reasons, BEREC believes that increasing focus on this topic and accelerating dialogue among all stakeholders could help identify and develop good practices from both technical and economic perspectives.

4.6. Combating fraud

Twilio considers a proactive approach to enabling trusted and verified branded calling a prerequisite for operators to invest in robust authentication frameworks that significantly reduce malicious call spoofing and scam rates, increase consumer confidence, and allow SMEs to scale services internationally without navigating a patchwork of national mandates.

> BEREC welcomes the Twilio comment and plans to address call spoofing issues, along with other types of fraud, under the project dedicated to Combating Fraud, which aims to identify existing best practices for combating fraud.

5. Strategic priority: Strengthening BEREC's capabilities and continuous improvement

ecta agrees with the work items identified by BEREC and particularly welcomes the statements indicating that BEREC is considering ways to simplify and reduce bureaucracy, promote the harmonisation of data collection, and, especially, that BEREC will continue to lead in sharing and developing regulatory best practices and guidelines for ECN/S. Many recent BEREC deliverables are descriptive and do not provide tangible guidance or agreed common approaches shared by NRAs. ecta reiterates its long-standing request for BEREC to adopt more Common Positions and issue more Best Practice documents. Unfortunately, this remains largely absent in the draft WP2026. ecta would like to highlight that BEREC's mandate, as set out in Regulation (EU) 2018/1971, concerns actions to be pursued towards achieving Article 3 EECC.

Connect Europe supports BEREC's intention to streamline work processes and enhance transparency. BEREC's work would benefit greatly from more transparent processes and a more open debate on its internal work, starting from the earliest stages of a legislative initiative, especially during opinion drafting and internal workshops. This would ensure industry insight is captured and improve policy quality. Additionally, longer and more flexible consultation periods and greater transparency are needed, for example by explaining why stakeholder contributions were or were not incorporated. It is rare to see these contributions reflected in modifications to the proposed draft text. Finally, four annual plenaries limit responsiveness and create inconsistent dialogue between BEREC and stakeholders. We propose exploring better planning of plenaries, or a different process allowing for more regular approvals and consultations, which could make a significant difference.

Twilio commends BEREC's ambition to strengthen its role as an independent, efficient, expertise-driven, and inclusive interlocutor. This is a critical moment in which BEREC can become central to designing the rules for the future, as an independent body seeking to update and harmonise rules as the Single Market evolves. BEREC should be further empowered and continue to do this in an inclusive manner, reflecting the evolving communications ecosystem that includes multiple players who are important enablers of innovation and new technology. Twilio supports BEREC's focus on data-driven regulation and believes it must continue to ensure a clear and inclusive approach to rule design, with open engagement with all stakeholders. Twilio looks forward to continued collaboration with BEREC in 2026.

BEUC welcomes the Work Programme's ambitions for the continued development of BEREC, in particular its agility, independence, inclusivity, and efficiency. As a frequent contributor and collaborator to BEREC's work on end-user rights, BEUC commends the commitment to further strengthen work with key stakeholders. As noted previously, BEUC looks forward to working with BEREC on the next iteration of the end-user rights workshop, and to exploring other possible avenues for collaboration to ensure that the consumer voice is heard and respected in the telecommunications sector.

BEREC thanks ecta for its detailed input and for highlighting the importance of maintaining clarity, harmonisation, and practical guidance in BEREC's work. BEREC intends to issue three sets of guidelines in 2026: (1) an update to the BEREC Guidelines on Geographical Surveys of Network Deployments,(2) further guidance on 5G Network Slicing, and (3) BEREC Retail & Wholesale Roaming Guidelines, all of which have greater legal relevance than, for example, reports. At the same time, in light of anticipated legislative changes and the need to ensure a balanced distribution of work, BEREC has prepared the Work Programme in its current form, considering the importance of items and the time constraints available.

BEREC thanks Connect Europe for its comments and for highlighting the importance of ensuring an effective and timely approval process, including the points raised regarding the scheduling of plenaries. BEREC emphasises that the current format for allocating plenary meetings is appropriate and also underscores that this formal document adoption process is complemented by electronic voting procedures for approving documents. BEREC appreciates the support expressed by Twilio and BEUC and agrees that it has consistently sought to operate as an independent and efficient body that applies data-driven regulation and acts in a transparent and inclusive manner. BEREC wishes to maintain and further strengthen this approach in the years ahead. Regarding the further comment from Connect Europe about explaining why stakeholder contributions were or were not incorporated, BEREC clarifies that providing such detailed responses would result in additional delays and place further resource burdens on other ongoing activities. Nevertheless, BEREC consistently reports on the outcomes of public consultations and makes these reports publicly available.

5.1. Stakeholder engagement

ecta thanks BEREC for its continued active engagement with industry stakeholders, including invitations to ecta to speak at workshops and the stakeholder forum, as well as for constructive exchanges with the BEREC chair and mini-board, working group co-chairs, NRA heads and representatives, among others. ecta notes that BEREC is increasingly relying on workshops, particularly internal workshops (to which external speakers may be invited). Transparency, provided well in advance, regarding all workshops and their format is essential – including the topic, date, agenda, and identity of invited experts – as well as an opportunity for stakeholders to indicate and justify why their participation would be appropriate.

Regarding the practical modalities of BEREC's formal stakeholder engagement, ecta considers that workshops where participants are given only a few minutes to speak in sequential presentations, and workshops held separately with different categories of stakeholders, do not allow for the in-depth substantive discussion of important topics that is necessary, and crucially do not enable genuine exchanges and reply comments, resulting in a lack of contradictory debate on key policies and regulatory approaches. ecta reiterates its request for BEREC to organise longer workshops, with sufficient time allocated for active substantive discussions among stakeholders.

ecta emphasises that at least six weeks is the minimum time needed for associations representing multiple stakeholders to respond to BEREC public consultations with solid content. Due account must also be taken of the periods leading up to and including holidays.

MVNO Europe appreciates all BEREC's stakeholder engagement initiatives and will be pleased to continue participating in the Stakeholder Forum, meet and greet sessions with Working Group co-chairs, responding to selected public consultations and calls for input, and holding bilateral meetings with key officials where relevant and timely.

FTTH Council Europe notes that BEREC's approach to stakeholder engagement, including public consultations, workshops, and transparent processes, is widely supported. The FTTH Council Europe encourages continued structured dialogue to ensure regulatory approaches reflect market realities. Continued focus on evidence-based, impartial regulation will consolidate BEREC's reputation as a trusted expert body.

BEUC reiterates its recommendation that public consultations should take place over longer periods. Unfortunately, a four-week period is not sufficient for an umbrella organisation with limited resources to properly and fully address all issues raised and produce an added-value contribution. Short deadlines for public consultations on documents of such complexity risk excluding smaller stakeholders with even more limited resources from adequately participating, thereby jeopardising the objective of any consultation: balanced, representative feedback from all stakeholders. This is particularly important for consultations that are especially relevant to consumer protection.

BEREC welcomes stakeholders' willingness to engage with its work and greatly values their dedication. BEREC will strive to remain transparent and further enhance its openness. It continuously adapts the format of its workshops to the level and type of participation, aiming to ensure the most effective outcomes.

BEREC will also endeavour to adjust the timelines of public consultations where possible; however, these timelines are often linked to other activities, which may limit the possibility of extensions. In certain cases, longer public consultations are therefore not feasible due to time constraints, or such activities would lead to significant delays in the deliverables. Whenever feasible, BEREC has provided longer consultation periods in the past and will continue to do so.

Regarding the comments from ecta on the organisation and transparency of BEREC workshops, BEREC notes the concerns raised. BEREC strives for continuous improvement and acknowledges that the workshop format can indeed be further enhanced. BEREC also agrees that timely communication of all relevant is essential. In this context, BEREC will address these aspects with all co-chairs of the 12 Expert Working Groups at the introductory meeting for 2026, with the aim of identifying practical solutions and further improving the formats and modalities of future workshops.

5.2. WACC parameters' calculation according to the EC Notice

Connect Europe would like to highlight that the annual work undertaken by BEREC to calculate the WACC parameters, following the methodology developed by the EC, results in the adoption of inappropriate WACC levels. This poses a significant problem for operators' remuneration, as an accurate WACC is essential to ensure stable returns on investment and adequate coverage of investment risk. A more flexible and forward-looking methodology is needed, particularly regarding the calculation of the risk-free rate, taking into account the impact of inflation on the economy as well as assessments made by investors.

> As Connect Europe highlights, BEREC's calculation of the WACC parameter follows the methodology set out in the EC Notice, to which BEREC is bound. The purpose of the Notice is to harmonise legacy WACC calculations for regulatory purposes across the EU, while allowing some flexibility– particularly regarding the estimation of the RFR parameter, as noted by Connect Europe– to reflect relevant national macroeconomic conditions. Since 2022, several NRAs have used this flexibility. To the extent that Connect Europe raises concerns about outcomes strictly resulting from the methodology of the WACC Notice, BEREC wishes to emphasise that such concerns relate to the underlying methodology rather than its application by BEREC.

6. BEREC's other tasks

6.1. BEREC inputs to the regulatory framework review and the DNA

Samsung Electronics (SE) wishes to highlight an issue that has not yet been addressed in previous work on the Digital Networks Act (DNA) or the update of the EECC, but should be included: specifically, the interoperability of electronic subscriber identity modules (eSIMs). The use of eSIMs across the European market is steadily increasing, and the first eSIM-only devices are being introduced. Currently, consumers using eSIMs are locked into their devices if they wish to switch between devices with different operating systems (OS).

Furthermore, SE notes another barrier to seamless eSIM switching on the network operator side, namely entitlement servers. Among 60 network operators across 22 EU Member States, the UK, Switzerland, and Norway, only 16 carriers' entitlement servers support multiple OS specifications, while 33 support only a single OS. Article 61(3) EECC states that national regulators, upon reasonable request, may require providers of electronic communications networks (MNOs) to provide access to "wiring, cables, and associated facilities" of their network infrastructure. SE argues that entitlement servers for eSIMs constitute "associated facilities." Requiring operators to allow device manufacturers access to their entitlement servers for eSIM switching purposes would, in SE's view, be a reasonable request.

There are standards for eSIM switching and entitlement server interoperability, but these are not currently being promoted by Member States. Given that industry-wide (GSMA) standards for eSIM interoperability exist, SE hopes that Member States will ensure all market participants adhere to them.

BEREC notes the concerns raised about eSIM interoperability and the barriers that may arise at both the device and network operator levels. BEREC will therefore ensure that the matter is examined with input from experts in the relevant fields, so that the various aspects highlighted by stakeholders are appropriately reflected in any future work or responses.

6.2. Monitoring quality, efficiency, and sustainability

6.2.1. Article 32/33 Phase II process

ecta reiterates its request, made in previous contributions to BEREC Work Programme calls for input and consultations, for BEREC to change its approach. Experience has shown that the Phase II process leading to a BEREC Opinion is a black box for stakeholders, with BEREC actively resisting stakeholder input. An initiative to provide transparency is necessary.

This workstream is primarily intended for internal use, for the benefit of NRAs. Moreover, BEREC cannot modify the approach, as it derives directly from the Code, which does not provide for a consultation of market participants at this stage of the notification process.

6.2.2. Report on regulatory accounting in practice

ecta continues to highly appreciate the value of this recurring report. It should continue to be improved, while maintaining strictly factual content. ecta is concerned by suggestions that "the report will be streamlined in terms of access products looked at" and "the report will develop a more focused analysis comparison of the most popular combinations of cost base and cost allocation methodologies". There is a real risk of losing BEREC's institutional memory, and consequently of BEREC and NRAs not being able to detect problems after deregulation. ecta therefore advocates retaining the full scope of the annual Report on Regulatory Accounting in Practice, supporting consistent monitoring of regulatory approaches over time.

BEREC's work on RA is always comprehensive, with no reduction in the number of access products monitored, even when markets are removed from the Recommendation of relevant markets susceptible to ex ante regulation or when regulation responds to market analysis

results by reducing regulatory intensity where appropriate. The risks outlined by ecta do not apply to this work stream.

6.2.3. Peer review process and engaging with RSPG

ecta notes that the RSPG-led peer review process on radio spectrum assignment has continued to occur only very occasionally, and only when Member States request it (five cases so far in 2025). When it has taken place, it has been in a closed forum, with the RSPG's annual report as the only published output. The most recent annual report, issued in February 2025, consists of a single page. A determined effort by both the RSPG and BEREC is needed to provide greater transparency.

ecta takes issue with the statement: "BEREC's participation in the Peer Review Forum contributes to the objective of promoting full connectivity through discussions with the RSPG about the market-shaping aspects of spectrum assignment." The fact that BEREC does not mention the promotion of competition, or that it should also be pursuing its Strategic Priority 2 (for example, through spectrum assignments aimed at promoting competition), is concerning and should be addressed. ecta therefore asks BEREC to provide greater transparency about its role in peer reviews and to amend section 6.3.2 to underscore its commitment not only to promoting full connectivity, but also to competition and end-user interests.

MVNO Europe notes that BEREC refers to its activity in the RSPG-led peer reviews only in the context of its strategic priority on promoting connectivity. MVNO Europe insists that much more is at stake in spectrum peer reviews, notably the promotion of competition and citizens' interests. MVNO Europe asks BEREC to amend the text of section 6.3.2 to confirm that it will in future participate in spectrum peer reviews considering all objectives contained in Article 3(2) EECC, as well as BEREC's own strategic priorities.

BEREC considers that stakeholders' comments on Peer Review are not new and essentially repeat views received during previous Work Programme consultations. In response to these stakeholder views, BEREC states that it supports the Peer Review process and does so in a manner consistent with all the general objectives set out in the EECC. Furthermore, as outlined in BEREC's Strategy 2026–2030, its strategic priorities are closely interrelated and should be considered as a unified and coherent whole. BEREC's latest position on the Peer Review topic is also presented in the BEREC response to the Exploratory Consultation and the BEREC input to the EC public consultation on the White Paper; documents BoR (23) 131 and BoR (24) 100, respectively.

As a result, BEREC does not change the text in the final Work Programme, as it must take all reasonable and necessary measures that are proportionate for achieving its objectives under Article 3(2)(a)–(d) of the EECC.

6.2.4. Roaming regulation potential ad hoc work in 2026

MVNO Europe noted that the European Commission has decided not to put forward a legislative proposal to update the EU Roaming Regulation (EU) 2022/612, despite BEREC's Opinion dated 28 March 2025. This is deeply disappointing from MVNO Europe's perspective, given that BEREC's Opinion contained welcome, tangible proposals to further promote competition, with explicit reference to MVNOs, notably favouring further reductions in wholesale roaming caps and clarifying wholesale roaming access obligations to ensure non-discriminatory access to network technologies.

MVNO Europe calls on BEREC to continue actively advocating that roaming is, more than ever, essential for competition (avoiding distortions that favour Mobile Network Operators (MNOs) over MVNOs), for end-user benefits, and for achieving the EU Single Market. MVNO Europe considers that roaming is key to achieving the EU Single Market, particularly for industrial use cases. This point is made with the knowledge that the co-legislative stage of the Digital Networks Act does not exclude initiatives by Parliament and Council. Roaming should not be considered by BEREC to be 'off the table'. MVNO Europe calls upon BEREC to continue, in 2026 and 2027, to actively present and explain its March 2025 Opinion on the review of the Roaming Regulation to co-legislators.

Specialist MVNOs active in this field report that MNOs are preventing MVNOs from meeting demand from industrial customers by refusing wholesale permanent roaming, applying various wholesale surcharges (e.g. up-front fees, per-SIM monthly fees), and requiring exclusivity in cases of domestic MVNO access to a single MNO (thus preventing dynamic roaming), while providing these capabilities to one another (MNO to MNO). This, in some cases, leads to serious anticompetitive practices and outcomes.

GSMA notes that BEREC is ready to provide input if the European Commission puts forward a legislative proposal to review the Roaming Regulation in 2026. However, we recall that, according to the Commission Report on the Review of the Roaming Market published in June 2025, the overall framework of the Roaming Regulation has proven effective, including in intensifying competition and creating dynamics at the wholesale level, and the findings of this report do not call into question the general principles underlying the Regulation. The European Commission must also carry out another interim review report by 30 June 2027.

BEREC thanks stakeholders for all the inputs provided and will continue to monitor developments in prices, QoS, access conditions, and other relevant aspects of the roaming market, as well as the extension of the geographical area of RLAH. BEREC will also remain available should the Commission request its opinion for the 2027 review report.

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7. Potential BEREC work for 2027 and beyond

ecta agrees with all four items listed in Chapter 8 of the draft WP2026 and expects to contribute its members' direct expertise, especially on topics relating to PIA regulation under symmetric and asymmetric regimes (8.2) and best practices for environmental impact assessment of mobile network sharing (8.4).

ecta expresses its regret that work on Equivalence of Inputs (EoI), which was included in previous BEREC work programmes, does not appear to be progressing to a full Report and Common Position.

The BEREC external workshop on the implementation of Equivalence of Inputs (EoI) by NRAs has been added with reference number 2.5 (postponed from 2025).

7.1. Monitoring of IP interconnection issues

Vodafone acknowledges BEREC's ongoing efforts regarding IP interconnection issues, which are critical for the telecommunications sector. However, Vodafone suggests that any update to the existing reports on this matter should adopt a holistic ecosystem perspective and, unlike previous discussions, place greater emphasis on fostering dialogue and industry collaboration.

BEUC particularly welcomes BEREC's vigilance in monitoring IP interconnection through to 2027, given the anticipated changes to the regulatory framework with the introduction of the Digital Networks Act. BEUC welcomes the reference to the Report on the IP Interconnection ecosystem, noting that BEREC is aware of a few IP-IC disputes that have occurred since 2017, and that BEREC's workshops have revealed similar insights. In a context where telcos continue to argue for the upcoming DNA proposal to include potential mechanisms for dispute settlement or arbitration, BEUC calls on BEREC to remain vigilant. As the consumer voice in Europe, BEUC stands ready to support BEREC's work in this area.

IP interconnection issues were recently examined in BEREC's dedicated report published in 2024. In this report, BEREC went further than in its previous studies (in 2012 and 2017), adopting a multi-pronged approach that included thorough desk research, an extensive quantitative and qualitative questionnaire, and a series of virtual workshops. Given the findings of the 2024 report (which are consistent with BEREC's previous work on the topic) and its comprehensive scope, a new update is not expected in the short term. Nonetheless, BEREC will continue to monitor ongoing developments in the IP-IC market closely.

7.2. Deepening BEREC's understanding on PIA regulation under symmetric and asymmetric regulatory regimes

<u>Vodafone</u> supports BEREC's work to collect data for the latest PIA report and welcomes efforts to deepen understanding of PIA regulation. Vodafone believes that further guidance to NRAs could take the form of BEREC common positions, which have been used more frequently in the past. Vodafone highly appreciates the efforts made to investigate the implementation of physical infrastructure access (PIA) in Europe, as this relatively low-tech access product is important for operators (by reducing deployment costs and enabling faster deployment) and for the general public (less disruption from civil works and quicker network upgrades). Additionally, PIA could be further harmonised regarding the technical specificities of the relevant access product.

> BEREC has duly taken the comments received into account and will consider them further in planning the work for 2027.

7.3. Further BEREC work on connected and automated mobility

<u>MVNO Europe</u> strongly welcomes this proposal and is prepared to contribute, as several MVNO Europe members are leading providers of connectivity to the automotive sector. Acceleration of this workstream would be most welcome. For reference, MVNO Europe has previously called on institutions, particularly the European Commission, to recognise that mandatory wholesale permanent roaming (an obligation on visited networks) is essential for both MNOs and MVNOs to succeed and achieve the EU Single Market, reflecting demands from the European automotive sector.

> BEREC thanks MVNO Europe for its willingness to contribute and appreciates its readiness to engage in this area of work