

Outline BEREC Work Programme 2027

BEREC aims at fostering independent, forward looking, consistent and high-quality regulation of digital infrastructures and services for the benefit of Europe and its citizens

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I. INTRODUCTION

The Body of European Regulators for Electronic Communications (BEREC) was established in 2009 and now operates under Regulation (EU) 2018/1971¹ (the BEREC Regulation) with the aim of pursuing the objectives under the European Electronic Communications Code² (EECC) and, in particular, to ensure the consistent implementation of the regulatory framework for electronic communications.

This document is the Outline of the annual work programme of BEREC for 2027, which has to be adopted by 31 January 2026³.

The objectives of the Outline BEREC Work Programme 2027 are based on the mandatory tasks falling to BEREC, stemming mainly from the EECC, and consider the BEREC Strategy 2026–2030⁴.

The Outline Work Programme 2027 reflects as well BEREC's institutional and international cooperation activities⁵ and its commitment to serve as a body for thoughtful and proactive debate, providing advice to the European Parliament (EP), the Council, and the European Commission (EC) in the field of electronic communications and digital services. Furthermore, BEREC aims to play an important role in further improving the consistent and harmonised application of regulatory rules, enhancing its working methods and engaging cooperatively and effectively with stakeholders.

Following the approach taken in previous years and in accordance with Article 21 of the BEREC Regulation, the EP, the Council, and the EC will be consulted on their priorities for the elaboration of the BEREC Work Programme 2027.

Third parties and stakeholders are also invited to participate by means of the annual meeting with stakeholders and the public consultation on the draft Work Programme. Specifically, BEREC organizes an annual forum with stakeholders ('Stakeholder Forum') with the aim to enhance transparency and collect the interested parties' views on BEREC's current and future work and, in particular, for the elaboration of the work programmes. The Stakeholder Forum will be held on Tuesday, 31 March 2026.

After input from the EU institutions and BEREC's stakeholders is received, a draft Work Programme for 2027 will be subject to a public consultation. The public consultation will

¹ Regulation (EU) 2018/1971 of the European Parliament and of the Council of 11 December 2018 establishing the Body of European Regulators for Electronic Communications (BEREC) and the Agency for Support for BEREC (BEREC Office), amending Regulation (EU) 2015/2120 and repealing Regulation (EC) No 1211/2009

² Directive (EU) 2018/1972 of the European Parliament and of the Council of 11 December 2018 establishing the European Electronic Communications Code (Recast), Regulation (EU) 2015/2120 of the European Parliament and of the Council of 25 November 2015 and Regulation (EU) No 531/2012 of the European Parliament and of the Council of 13 June 2012.

³ According to Article 21 of the BEREC Regulation.

⁴ Document (BoR (25) 189) <https://www.berec.europa.eu/en/all-documents/berec/berec-strategies-and-work-programmes/berec-strategy-2026-2030>

⁵ According to Article 35 (3) of the BEREC Regulation.

run for a 4-week period in quarter 3, 2026. The final BEREC Work Programme 2027 will be adopted at the fourth BEREC Board of Regulators plenary in December 2026. BEREC will publish and transmit the annual work programme for 2027 to the EP, the Council, and the EC, as soon as it is adopted.

II. BACKGROUND

The four objectives in Article 3(2) of the EECC are the foundation for the work set out in BEREC's annual work programmes and are the guiding force for the Work Programme 2027. These objectives serve as the strategic foundation of the assignments set out in BEREC's multi-annual work programmes. These are:

1. Incentivising connectivity, access and take-up of Very High Capacity Networks (VHCN).
2. Promoting competition and efficient investment.
3. Contributing to the development of the internal market.
4. Promoting the interests of the citizens of the Union.

The EECC, the BEREC Regulation⁶, the Open Internet Regulation (Regulation (EU) 2015/2120)⁷, the Roaming Regulation (Regulation (EU) 2022/612)⁸, the Gigabit Infrastructure Act (Regulation (EU) 2024/1309)⁹, the Data Act (Regulation (EU) 2023/2854¹⁰) the Digital Markets Act (DMA, Regulation (EU) 2022/1925)¹¹, and the mandatory tasks stemming from these legislative instruments, provide the basis for the Outline BEREC Work Programme 2027. In line with the legislative framework, BEREC has adopted a Strategy for the years 2026–2030¹². The Strategy defines the high-level strategic priorities that guide the work that BEREC will undertake in 2027. While the Outline Work Programme 2027 seeks to address current regulatory challenges, it has also been developed to prepare to new challenges ahead resulting from legislative, political, economic and technological developments.

The Outline Work Programme 2027 contains those items from the 2026 Work Programme¹³ which will be carried over and completed in 2027 in addition to *ad-hoc* or recurring items and including also some preliminary identified potential workstream proposals.

⁶ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32018R1971>

⁷ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32015R2120>

⁸ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32022R0612&qid=1699465943801>

⁹ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32024R1309>

¹⁰ https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:L_202302854

¹¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32022R1925>

¹² Document (BoR (25) 189) <https://www.berec.europa.eu/en/all-documents/berec/berec-strategies-and-work-programmes/berec-strategy-2026-2030>

¹³ Document (BoR (25) 186) <https://www.berec.europa.eu/en/all-documents/berec/berec-strategies-and-work-programmes/berec-work-programme-2026>

This Outline Work Programme also seeks to be consistent with the vision, targets, and roadmaps for Europe's digital transformation by 2030, set out in the Digital Compass and the Policy Programme 'Path to the Digital Decade', the EU Global Gateway strategy (2021) and the European Green Deal (2020). In addition, it aims to be aligned with the EC priorities for electronic communications, digital services and infrastructures, as well as for the international cooperation and relations with third countries.

In 2024, the EC published the White Paper – 'How to master Europe's digital infrastructure needs'¹⁴. This White Paper sets out the context for future proposals, namely the review of the EECC by 21 December 2025 and the Digital Networks Act (DNA). Moreover, as required by the Roaming Regulation¹⁵, the EC will assess the functioning of the roaming market by 30 June 2027 and, as set in the Open Internet Regulation¹⁶ (OIR), the EC will also review the functioning of this Regulation by 30 April 2027.

From a more general perspective, three high-level reports (Letta¹⁷, Draghi¹⁸ and Niinistö¹⁹) were published throughout 2024 outlining measures to strengthen the internal market, enhance EU economic competitiveness, and ensure common security. Building on the recommendations of these reports, in January 2025 the EC introduced an EU Competitiveness Compass for the EU²⁰ as a roadmap to restore Europe's global competitiveness while ensuring secure and sustainable prosperity. The Compass emphasizes regulatory simplification and single-market integration and includes key initiatives to accelerate infrastructure investment and measures to strengthen the EU's role in AI²¹. The EC has also launched the Data Union Strategy²² initiative, which seeks to simplify data rules to allow businesses and administrations to share data more seamlessly and at scale. In connection with this initiative, the EC has also put forward a Digital Omnibus²³, that will be the first step of the Digital Package on Simplification²⁴, aimed at streamlining the EU's digital rulebook especially for cybersecurity, AI and data. Further to this initiative, a general Digital Fitness Check²⁵ will be undertaken.

BEREC acknowledges the current ongoing review of the electronic communications regulatory framework, including the possible associated governance changes, as well as

¹⁴<https://digital-strategy.ec.europa.eu/en/library/white-paper-how-master-europes-digital-infrastructure-needs>

¹⁵<https://eur-lex.europa.eu/eli/reg/2022/612/oj/eng>

¹⁶<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32015R2120>

¹⁷<https://www.consilium.europa.eu/media/ny3j24sm/much-more-than-a-market-report-by-enrico-letta.pdf>

¹⁸https://commission.europa.eu/topics/strengthening-european-competitiveness/eu-competitiveness-looking-ahead_en

¹⁹https://commission.europa.eu/topics/defence/safer-together-path-towards-fully-prepared-union_en

²⁰https://commission.europa.eu/document/download/10017eb1-4722-4333-add2-e0ed18105a34_en

²¹ These include the proposed Cloud and AI Development Act and the AI Continent Action Plan

²²https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14541-European-Data-Union-Strategy_en

²³<https://digital-strategy.ec.europa.eu/en/news/commission-collects-feedback-simplify-rules-data-cybersecurity-and-artificial-intelligence-upcoming>

²⁴https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14855-Simplification-digital-package-and-omnibus_en

²⁵https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/15554-Digital-fitness-check-testing-the-cumulative-impact-of-the-EUs-digital-rules_en

other legislative initiatives that impact the digital sector as, for example, the Digital Fairness Act (DFA, scheduled for Q4/2026) proposal or the review of the Digital Services Act (DSA, due in 2027) or the Digital Markets Act (in 2026). While contributing to these exchanges in its role as expert advisory body of the EU institutions, BEREC's work will be based on and aligned with the legislation in force. At the same time, BEREC will respond to any developments that might arise and require consideration for inclusion in the Work Programme 2027, especially regarding the ongoing DNA legislative process.

III. BEREC WORK IN 2027

BEREC will execute its work streams around the four strategic objectives of the EECC and, in doing so, it will take into consideration the high-level strategic priorities for the period 2026-2030, identified as most relevant for meeting the strategic objectives, as well as the institutional and international cooperation.

Electronic communication networks and services are part of the digital ecosystem, featuring strong interdependencies among the different players, tightly interrelated infrastructures and services, with undefined and overlapping boundaries and typically evolving towards ecosystems. Moreover, the evolution of electronic communications themselves poses new challenges to the current roles and mandates of the NRAs, to which they need to adapt (e.g. technological developments, traditional and digital market developments, sustainability, cybersecurity, resilience). Accordingly, BEREC will continue to consider emerging challenges and issues beyond the traditional scope of the electronic communications regulation in its activities.

1. High Level Strategic Priorities

The BEREC Strategy 2026 – 2030 reviews and consolidates the previous three strategies (Strategy 2021 – 2025²⁶, the Medium-Term Strategy for relations with other institutions²⁷ and the Medium-Term Strategy for International Cooperation²⁸) along with the Action Plan 2030²⁹ and sets up BEREC's objectives in view of the latest and expected market, technological and regulatory developments relevant for the next five years. Building on

²⁶<https://www.berec.europa.eu/en/document-categories/berec/berec-strategies-and-work-programmes/berec-strategy-2021-2025>

²⁷<https://www.berec.europa.eu/en/document-categories/berec/berec-strategies-and-work-programmes/berecs-medium-term-strategy-for-relations-with-other-institutions-2022-2025>

²⁸<https://www.berec.europa.eu/en/document-categories/berec/berec-strategies-and-work-programmes/berecs-medium-term-strategy-for-international-cooperation-for-the-period-2022-2025>

²⁹<https://www.berec.europa.eu/en/document-categories/berec/others/berec-action-plan-for-2030>

the overarching objectives of the EECC, the BEREC Strategy defines the following high-level strategic priorities:

Strategic priority 1: Promoting full connectivity and the digital single market

Promoting connectivity and access to electronic communication networks implies prioritizing work aimed to improve the conditions for the expansion and take-up of secure, resilient, competitive, and reliable very high-capacity networks (fixed and wireless) across Europe, covering key infrastructures -terrestrial, space and submarine-, together with the enabling digital infrastructures and technologies which support these developments.

BEREC will also contribute to fulfilling the digital single market by ensuring a coherent implementation of the regulatory framework across the EU and facilitating the provision of cross-border services by, for example, supporting the coordinated enforcement of the Roaming and intra-EU communications Regulation.

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

BEREC remains committed to support open and competitive digital ecosystems, promoting innovation, investment and user welfare.

Sector-specific regulation in electronic communications markets allowed monopolistic structures to evolve into more competitive markets, enabling consumer choice and incentivizing investment in cutting-edge networks and innovative services. While very significant progress has been made in lowering barriers to entry across most of these markets, challenges still remain. Ex-ante market regulation continues to be targeted and flexible by imposing tailored and proportionate remedies to the problems identified. BEREC will continue to offer its expertise to assess markets and facilitate deregulation where competition is effective, while prioritizing measures to stimulate competition and efficient investment in less competitive regions, particularly rural and underserved areas.

BEREC will draw on its experience to continue monitoring developments in digital markets and to provide its expertise for the implementation of digital regulations and their evolution. Among other initiatives, BEREC will continue contributing to the general enforcement of the DMA as a member of the High-Level Group and closely cooperating with the EC for the implementation of interoperability obligations of number independent interpersonal communication services for gatekeepers.

Strategic priority 3: Empowering End-users

Promoting the interests of consumers in the fast-evolving digital ecosystem will require strong consumer protection rules, transparency and (new) digital skills. BEREC will continue to safeguard end-user protection, ensuring transparency and informed decision-making in a rapidly evolving environment. Priority will also be given to combating digital

exclusion by assessing new sources of digital divide arising from emerging technologies and to continued promotion of universal accessibility.

BEREC will also continue contributing to the consistent implementation of the Open Internet Regulation, safeguarding the openness of digital services and end-users' choice.

Strategic priority 4: Contribution to sustainable, secure and resilient digital infrastructures

BEREC will work to support the development of a secure, resilient and environmentally sustainable electronic communications ecosystem where ensuring continuity of communications services requires coordinated strategic, operational, and technical measures as well as their harmonized implementation.

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

BEREC continuously reviews and improves its working practices to promote greater efficiency, high-quality deliverables, transparency and environmental sustainability. BEREC prioritises effective communication to ensure transparency, build trust, and strengthen its relationships with stakeholders and key target audience.

BEREC is also considering means to simplify and reduce bureaucracy across all areas of its work. Among other initiatives, BEREC will continue promoting the harmonisation of data collection across the EU to minimise the administrative burden for stakeholders while strengthening the internal market.

2. Cooperation with EU institutions and institutional groups

In an increasingly global and interconnected digital ecosystem, BEREC acknowledges the crucial importance of continued exchanges with other EU bodies, competent authorities of third countries, and international organisations. Accordingly, BEREC will continue its efforts to foster dialogue and cooperation with relevant external actors, as stipulated in Article 35 of the BEREC Regulation. Where appropriate, and subject to prior approval by the EC, BEREC may seek to establish formal working arrangements with these external actors.

Institutional cooperation

BEREC cooperates regularly with the RSPG in the context of the radio spectrum peer review process established by the EECC as well as with the NIS Cooperation Group and ENISA for the implementation of the 5G toolbox and the Cybersecurity Action Plan designed as a follow-up of the Call from Nevers, France in 2022. BEREC collaborates with the European Conference of Postal and Telecommunications Administrations (CEPT) on

numbering related matters and contributes to the implementation of the DMA as a member of the High-Level Group.

BEREC will continue to collaborate and exchange information with other EU regulatory platforms and bodies. The exchange of views about practical issues of digital regulation is increasingly important to ensure the coherent and efficient implementation of the EU legislation. In view of the sectoral developments, BEREC will endeavour, in the context of network cloudification, to strengthen its relations with the EDIB (European Data Innovation Board), in charge of the DA implementation, and with the EEA (European Environment Agency) in relation with BEREC's activities in sectoral environmental sustainability. Considering the increasing relevance of market access through non-terrestrial networks (NTNs), BEREC also aims to initiate relations with the European Agency for the Space Programme (EU SPA). Other relevant bodies in the implementation of digital and market policies are the European Data Protection Board (EDPB) and the European Competition Network (ECN).

BEREC recognizes the importance of collaboration with relevant standardization bodies on topics for which BEREC is competent such as QoS, infrastructure sharing, sustainability or the implementation of the EECC standardization provisions.

Finally, BEREC's objectives to harmonize and streamline indicators and data collection would benefit from further cooperation with Eurostat.

BEREC will stay open to information-sharing with all institutional entities and will keep identifying thematic areas and relevant entities to build new relationships with the relevant bodies.

International Cooperation

The global nature of digital services means that policies, legislation and regulation from other parts of the world are becoming increasingly important. BEREC benefits from cooperation with NRAs and with other international regulatory networks, policymakers and institutions involved in electronic communications matters from outside the EU. This cooperation allows for the exchange of views on cross-border and common issues, and to closely follow global trends in technology and changing business models. Moreover, non-EU regulatory networks have been expressing great interest in the EU's regulatory approach.

BEREC's international activities complement the policies of the EU in terms of both cooperation topics and priority regions with which to cooperate. BEREC will continue supporting EU initiatives, such as the Global Gateway³⁰, with its expertise and in close cooperation with the EC. Following the request of the EC, BEREC has contributed to European initiatives such as the provision of technical support for the implementation of

³⁰ https://commission.europa.eu/document/download/3378e8f6-9d65-4ca0-8ab6-ce81399d5db6_en

the Western Balkans regional roaming agreement. BEREC will continue supporting the NRAs of countries which are on track to or will seek to enter the EU roaming area.

BEREC aims to continue and further strengthen its long history of cooperation with NRAs' regulatory networks in other regions, namely EMERG (European Mediterranean Regulators Group), REGULATEL (Latin American Forum of Telecommunications Regulatory Entities) and EaPeReg (Eastern Partnership Regulators' Network). Furthermore, BEREC has also signed Memorandums of Understandings (MoUs) with the NRAs of the United States (FCC), Canada (CRTC) and India (TRAI).

Finally, BEREC also cooperates in electronic communications matters with other international institutions such as the International Telecommunication Union (ITU) and the Organisation for Economic Co-operation and Development (OECD).

3. BEREC tasks under EU legislation

There is a significant number of tasks that BEREC carries out and follows up on an ongoing basis, described hereunder, under the following headings:

- The European Electronic Communications Code (EECC)
- Open Internet Regulation (OIR)
- Roaming and intra-EEA communications
- The Digital Markets Act (DMA)

3.1. The European Electronic Communications Code

BEREC opinion on the national implementation and functioning of the general authorisation

Article 122(3) of the EECC establishes BEREC to publish, by 21 December 2021 and every three years thereafter, an opinion on the national implementation and functioning of the general authorisation, and on their impact on the functioning of the internal market. Pursuant to this obligation, BEREC published its first opinion on 9 December 2021, and a subsequent opinion on 5 December 2024.

Considering the obligation of periodical review of the functioning of the general authorisation (every three years starting from 2021), the following review should be conducted by the end of 2027. Therefore, BEREC envisages a specific item for this review in the BEREC Work Programme 2027.

BEREC opinion on end user rights

Article 123 of the EECC establishes BEREC to publish, by 21 December 2021 and every three years thereafter, an opinion on the market and technological developments and on their impact on the application of rights of end-users in the EECC (Title III of Part III). Pursuant to this obligation, BEREC published its first opinion on 9 December 2021, and a subsequent opinion on 5 December 2024.

Considering the obligation of periodical monitoring of technological and market developments and their impact on the application of the end-user rights (every three years starting from 2021), the following review should be conducted by the end of 2027. Therefore, BEREC envisages a specific item for this review in the BEREC Work Programme 2027.

Ad hoc input to the EU Institutions and support to National Regulatory Authorities (NRAs)

BEREC will remain available to provide ad hoc input on request to the EU institutions (EC, Parliament, and Council), particularly during the review of the current regulatory framework as well as in the implementation phase of new legislation. BEREC will also be the forum for its member NRAs to discuss newly emerging questions and issues.

BEREC Opinions under Article 32/33

BEREC will continue to issue opinions concerning new Phase II cases when they arise based on the expertise of the market analysis of its NRAs. The aim is to achieve a high degree of consistency regarding measures imposed by NRAs to contribute to the development of the internal market for electronic communications.

Peer review process

According to the EECC (Article 35), when an NRA and/or competent authority intends to undertake a selection procedure in relation to radio spectrum bands for which technical conditions have been harmonised in order to enable their use for wireless broadband electronic communications networks and services, it shall inform the RSPG about any such draft measures and indicate whether and when it will request the RSPG to convene a Peer Review Forum. The Peer Review forum shall be open to experts from BEREC.

3.2. Open Internet Regulation

Implementation of the Open Internet (OI) Regulation and the BEREC Open Internet Guidelines

Regulation (EU) 2015/2120 (the 'Open Internet Regulation (OIR)') prescribes, among other, that NRAs should 'closely monitor and ensure compliance' with the OIR and should 'publish reports on an annual basis regarding their monitoring and findings'.

Since 2017, BEREC has been publishing an annual report on the implementation of the OIR and provided a forum for discussion of national cases and questions to ensure a predictable and consistent application of the OIR.

In the corresponding 2027 work stream, BEREC will monitor the implementation of the open internet provisions among NRAs for the period from 1 May 2026 to 30 April 2027. BEREC will collect the annual national Open Internet reports and the responses to an internal questionnaire to prepare the annual European-level Open Internet report.

To support the NRAs' obligation to 'closely monitor and ensure compliance' with the Regulation, a forum will be held to discuss questions relating to the consistent application of the OIR on an informal basis, in the form of experience sharing and exchange of information on important decisions in national cases.

Finally, BEREC will also contribute to the potential revision of the Open Internet Regulation according to the current review provisions.

3.3. Roaming and intra-EEA communications

International Roaming benchmark data and monitoring report

Article 21 of the Roaming Regulation establishes a yearly obligation for BEREC to collect data and provide a report for the EC. The report is based on collected data and includes information about price evolution, consumption patterns in the Member States (both for domestic and roaming services), the evolution of actual wholesale roaming rates for balanced and unbalanced traffic and the relationship between retail prices, wholesale charges and wholesale costs for roaming services. BEREC will launch the relevant annual data collection. The information that will be received from operators will be used for the preparation of the comprehensive yearly BEREC Roaming data report which will be published in 2027.

Contribution to the EC report on the roaming regulation

By 30 June 2027, the Commission shall submit an interim report to the European Parliament and to the Council, based on the data collected by BEREC pursuant to Article 21(2) of the Roaming Regulation, followed, if appropriate, by a legislative proposal to amend the Regulation. In case the European Commission requests a BEREC Opinion for

its interim review report due in June 2027, BEREC will deliver it in accordance with the EC request.

Intra-EU communications Benchmark Report

According to the regulation on Intra-EU Communications, NRAs shall monitor the price developments of regulated intra-EU communications services. For this purpose, BEREC provides a template to contribute to a harmonised data collection in the EU/EEA. NRAs are therefore collecting data from both fixed and mobile operators on a yearly basis and submit the data to BEREC. In 2027, BEREC will publish the 8th Benchmark Report on the findings, based on data collection.

Contribution to the EC report on the intra-EU communications regulation

By 30 June 2027, after consulting BEREC, the Commission shall review Article 5a of the Regulation (EU) 2015/2120 about intra-EU communications, and based on the assessment of its impact, the Commission may, if appropriate, decide to submit a legislative proposal to amend it. BEREC will provide its Opinion in accordance with the EC request. In addition, by 30 June 2028, the Commission shall, after consulting BEREC, adopt an implementing act laying down the technical rules on safeguards, such as sustainability, fair use and anti-fraud measures that are needed for the abolition of different retail prices to consumers for domestic communications and intra-EU communications. BEREC will start working during 2027 on the preparation of its Opinion in accordance with the EC request.

3.4. The Digital Markets Act

As a member of a dedicated High-Level Group created under the DMA³¹, BEREC assists the European Commission by means of advice, expertise and recommendations relating to the implementation, evolution, and enforcement of the DMA.

In addition, BEREC advises the European Commission on matters related to the interoperability obligation for number independent interpersonal communication services (NI-ICS) imposed on gatekeepers pursuant to Article 7 of the DMA, and is at the EC's disposal for any other issue in relation to electronic communication services or where BEREC's experience can be valuable. BEREC is eager to continue this fruitful cooperation with the EC in the future.

Furthermore, BEREC continues to monitor and analyse the developments in the digital markets and the impact and effects of the business practices of large digital platforms.

³¹ Article 40 DMA

Such monitoring may translate into different types of BEREC deliverables (opinions, positions, workshops, etc.).

4. Quality and efficiency of regulation

BEREC's Action Plan 2030 sets the ambition of strengthening BEREC's agility, independence, inclusiveness, and efficiency as a centre of expertise. In line with this vision, BEREC is continuously reviewing and improving its working practices to promote greater efficiency, high-quality deliverables, transparency and environmental sustainability.

Article 32/33 Phase II process

Since 2014, BEREC has undertaken an annual analysis of Article 32/33 EECC Phase II cases, aimed at gaining a better understanding of both the procedural and substantive aspects of these cases to inform BEREC's members. In 2015, a comprehensive database of Phase II cases was developed, comprising all relevant information including final outcomes of the cases.

BEREC will continue to add new Phase II cases to this database. The objective is that the database can be consulted by BEREC members, in particular experts of Phase II cases, both for referencing a particular case and to analyse key themes amongst the cases over time.

WACC parameters' calculation according to the EC Notice

Following the Commission's Notice on the WACC of 7 November 2019, BEREC's task is to calculate various parameters of the WACC formula according to the methodology laid down in the EU WACC Notice. BEREC, in close collaboration with the EC, will identify a peer group of EU SMP operators for the calculation of some of these parameters.

For NRAs to be able to take the parameters into account when calculating the WACC for the national markets, BEREC will calculate the parameters not later than 30 June.

Report on regulatory accounting in practice

The Regulatory Accounting in Practice Report will provide an up-to-date factual overview of the regulatory accounting frameworks used in Europe and an assessment of the level of consistency achieved by NRAs. The Report is prepared annually and updates the previous versions published since 2005. In 2027, emphasis will continue to be placed on consistency in regulatory accounting with respect to key access products (including e.g., fibre) and will seek to maintain the detail and in-depth analysis of the methods covered to identify commonalities and reasons for differences. The Report will continue to collect data on the methodology and input parameters used to calculate the rate of return on capital employed and examine their impact on the results.

Collaboration on Internet access service measurement tools

In 2027 and beyond, BEREC will continue to work towards a harmonised measurement framework and to support NRAs in their national measurement tool deployments. BEREC will continue to provide a forum for NRAs to share information and exchange experiences and best practices related to the development and deployment of national net neutrality measurement tools, also taking into account the opportunities offered by new technologies. This workstream will also consider how to maximise the benefits of existing NRA cooperation in this area and support the migration of interested NRAs towards a harmonised measurement tool by working together to improve the measurements and by sharing codes or components.

5. Communications and engagement

BEREC will continue to engage with stakeholders so that they can share their views and ideas and contribute to BEREC's work, promoting transparency and awareness of BEREC's regulatory role and initiatives. Those activities are developed in the framework of a Communications Plan and include public consultations, major public events such as the Stakeholder Forum and public debriefings, managing BEREC's online presence, and maintaining the BEREC website ensuring information is accessible, updated and user-friendly.

BEREC Communications Plan 2027

The BEREC Communications Plan sets out the communications activities that are planned for the particular year. The objective is to strengthen the perception of BEREC as an impartial, independent, European, forward-looking expert body and to support all of BEREC's strategic objectives. The plan complements the BEREC External Communications Strategy, which sets out the overall approach of BEREC communications.

Typically, the plan includes several communications deliverables that support and promote specific workstreams in the annual BEREC Work Programme. They may include promotional and educational campaigns on social media, development of communications kits with production of audio-visual and digital content, information updates to the website, organisation of events, and promotion of fruitful media relations. In line with the objectives set out in the Communications Plan, BEREC will continue to communicate on the day-to-day activities of BEREC's work.

BEREC's Communications Plan 2027 will be finalised for internal use in December 2026.

Stakeholder Forum

BEREC prioritises engagement with its stakeholders by applying an open-door policy and investing in long-term solid collaboration. The BEREC Stakeholder Forum 2027 will

provide a platform for dialogue between BEREC and stakeholders on relevant regulatory issues. The annual event enables the exchange of ideas in an informal setting, and the feedback gathered will be a key source to guide BEREC's future activities and priorities.

The event features also "*Meet & Greet*" sessions, where stakeholders can have in-person meetings with the BEREC Working Group Co-chairs. The feedback received during the event complements the written inputs received during the first call for input and the public consultation for the final BEREC Work Programme.

Public debriefings

BEREC will host public debriefings after each ordinary meeting to ensure transparency and engage with stakeholders. These events provide an opportunity to present BEREC's work outcomes, launch public consultations, address stakeholder inquiries, and share information about upcoming events. The debriefings will be hybrid and livestreamed on the BEREC website, LinkedIn and YouTube.

BEREC Work Programme 2028

The BEREC Regulation sets out a process for configuring the Annual Work Programme. According to the Regulation, the Board of Regulators shall adopt the outline of its annual work programme by 31 January of the year preceding that to which the annual work programme relates. After consulting the European Parliament, the Council, and the Commission on their priorities, as well as consulting other interested parties, the Board of Regulators shall adopt the final annual work programme by 31 December 2027. The Board of Regulators shall transmit the annual work programme to the European Parliament, the Council, and the EC as soon as it is adopted.

BEREC will publish a Work Programme outline by the end of January 2027 and will then work to finalise the 2028 Work Programme taking into account stakeholders' input by the end of the year.

BEREC annual reports

According to the BEREC Regulation, BEREC must provide its annual activity report to the European Parliament, the Council, the European Commission and the European Economic and Social Committee by 15 June of the year subsequent to the year reported on in the annual activity report. BEREC has to report annually on technical matters within its competence, in particular on the market developments in the electronic communications sector.

BEREC will continue to publish its annual report on its activities as well as an annual report on developments in the sector as part of a single document. Whereas the Annual Report on BEREC activities focuses on the outcome of the work prepared by its Working Groups and ad-hoc teams based on the Work Programme, the Annual Report on developments

in the electronic communications sector summarises BEREC's view on the past year as well as a perspective of future developments and challenges in the sector.

6. Projects brought forward from 2026

This chapter contains items that are continuation or follow-up projects of work started in previous years. In some cases, the second phase of a project is the finalisation of a report after carefully considering the stakeholder input from a public consultation. More details about these specific projects are included in the BEREC Work Programme 2026³².

BEREC Report on the Application of Fair and Reasonable Pricing within the SMP Framework

The Staff Working Document accompanying the Gigabit Recommendation highlights the possibility of fair and reasonable pricing in scenarios where strict quantitative price controls are not required. This type of pricing regulation is particularly relevant when some level of pricing flexibility has been granted to operators, but the NRA should still retain the ability to intervene if prices are deemed inappropriate or excessive.

Fair and reasonable pricing is also the main form of price regulation permitted for wholesale-only operators. However, there is very limited guidance on how this obligation should be interpreted within the SMP framework. As a result, different NRAs have adopted varying approaches to implementing and monitoring these obligations.

This BEREC report shall present an in-depth review of the interpretations and applications of fair and reasonable pricing obligations within the SMP framework across Europe.

The scope will include an overview of NRA approaches, providing a comprehensive description of the context in which NRAs apply fair and reasonable pricing obligations (i.e. in which markets and circumstances), including their reasoning and motivations, and how they implement and monitor those obligations. If possible, BEREC will also identify potential patterns, highlighting trends and/or specific approaches adapted to particular market contexts.

Comparisons with other frameworks could also be included in order to explore potential differences of how fair and reasonable pricing is interpreted in other regulatory contexts, such as under the provisions of GIA/BCRD.

The draft BEREC report on the application of fair and reasonable pricing within the SMP framework will be adopted for public consultation at Q4 2026. The final report will be adopted at Q2 2027, along with the results of the public consultation.

³²https://www.berec.europa.eu/system/files/2025-12/BoR%202825%29%20186_BEREC_WORK_PROGRAMME_2026.pdf

BEREC Report on access conditions to state-aid funded networks

In recent years, state-aid-funded FTTB/H networks have been rolled out in most EU Member States. These networks have to offer wholesale access at certain terms and conditions, which are of significant importance for the development of competitiveness in these areas going forward.

According to the Broadband State Aid Guidelines, “Member States must consult NRAs on wholesale access products, conditions and pricing. NRAs are encouraged to provide guidance [...].” It can therefore be assumed that several NRAs have gained experience in determining access conditions to state-aid funded networks, including on specifics related to economical and technical feasibility.

BEREC is planning to develop an overview of NRA approaches undertaken for the evaluation of the appropriate wholesale access conditions to fixed state-aid-funded networks from an economical and technical perspective, accompanied by details on price determination. The focus will be on both active and passive access services.

BEREC’s report will build on a dedicated data collection exercise from the NRAs and will promote experience exchange, with the aim of contributing to dissemination and harmonisation of practices.

The draft BEREC report on access conditions to state-aid funded networks will be adopted for public consultation at Q3 2026. The final report will be adopted at Q1 2027, along with the results of the public consultation.

BEREC report on the competition dynamics of artificial intelligence and its impact on internet openness and end-users

Artificial intelligence (AI) is increasingly becoming a relevant component of the (digital) economy.

BEREC has already produced several deliverables on AI and related topics in the last years, such as its BEREC High-level position on artificial intelligence and virtual worlds (BoR (24) 68), the BEREC Report on the impact of AI solutions in the telecommunications sector (BoR (23) 93), the BEREC Report on Cloud and Edge Computing Services (BoR (24) 136), and the BEREC external study on the trends and cloudification, virtualisation, and softwarisation in telecommunications (BoR (23) 208).

As highlighted in BEREC’s High-level position, AI has the potential to enrich user experience and complement traditional methods of accessing online content and services. However, AI can also affect the overall user experience on the internet as it has the potential to directly influence how users’ access and trust online content/services and consequently, their freedom of choice.

BEREC will produce a report to further analyse (i) the competition dynamics of AI markets (potentially including providers of related services when relevant). In this context, the report may also consider how algorithmic prioritisation can skew competitive dynamics;

and (ii) the impact on internet openness – which can be defined as the ability of users to access and distribute information and content online, without unlawful interference or discrimination, as well as their ability to innovate. This can typically happen when AI defines the information and content which is suggested to users.

The draft BEREC report on the competition dynamics of artificial intelligence and its impact on internet openness and end-users will be adopted for public consultation at Q3 2026. The final report will be adopted at Q1 2027, along with the results of the public consultation.

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

The aim of the European Accessibility Act (EAA) is to harmonise accessibility requirements for products and services by eliminating and preventing barriers to the free movement of certain accessible products and services, arising from divergent accessibility requirements and different stages of preparatory activities in Member States. Although the BEREC workshop on end-user rights held in April 2024 proved to be a valuable forum for sharing views and concerns related to accessibility (with one session being dedicated to this topic), the further focus of BEREC on the matter is crucial in order to prepare for the implementation of the requirements stemming from the EAA. This workshop would serve as an initial step to the report.

The report would build on the work done by BEREC in 2015, 2017 and, most recently, in 2022, resulting in the BEREC Report on measures on equivalent access and choice for disabled end-users, in which information from NRAs was collated with the aim of creating an inventory of measures and initiatives for NRAs to have in place so as to ensure equivalence of access.

In this benchmarking report, the measures in place throughout the Member States for meeting the accessibility requirements established in the EECC and in the EAA, which came into force on 28 June 2025, would be identified.

In order to ensure that a strategic view of the measures taken is presented in the report, in addition to seeking information from NRAs, BEREC may also seek input from key stakeholders regarding any measures provided independently from those prescribed by the NRAs under other relevant consumer legislation. The role of NRAs in ensuring accessibility requirements in electronic communications would also be outlined.

The draft BEREC report on practices for ensuring equivalence of access and choice with respect to accessibility will be adopted for public consultation at Q4 2026. The final report will be adopted at Q2 2027, along with the results of the public consultation.

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

Since 2020, BEREC has built substantial expertise, especially with regard to transparency mechanisms and sustainability indicators. Building on its 2023 Report on Sustainability indicators for ECN/ECSs, and its 2024 workshop on telecoms regulators' role in this regard and the European Commission's study on 'identifying common indicators for measuring the environmental footprint of electronic communications networks, BEREC continued its work on sustainability indicators in 2025 and will also continue in 2026. In particular, BEREC will contribute to and support the work of the European Commission on the future Code of Conduct for ECN/ECSs. It will set the ground for BEREC ad hoc data collection through a questionnaire on the implementation of key sustainability indicators, which NRAs will be invited to distribute to their market players. It will also help to establish the ground for further assessments of the environmental footprint of the ICT sector as key input for data-driven regulatory decision-making. It will closely follow further developments with regard to the EU Taxonomy in terms of green investments in telecommunication networks, as well as the Omnibus Package proposals for simplifying sustainability reporting. It will also take into account the work led by ITU and, specifically, the work of the Expert Group on Telecommunications/ICT Indicators (EGTI).

On the basis of the Code of Conduct for ECN/ECS, BEREC will assess any further action it may take. Market operators may need further guidance in order to be able to implement the Code of Conduct, especially with regard to the expected practices. BEREC will maintain dialogue with market participants about their experiences of implementing the Code of Conduct.

A draft BEREC report is scheduled for public consultation in Q4 2027 and will be finalized in Q2 2028, together with the BEREC report addressing the feedback from the public consultation.

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

This project is intended as a follow-up on the 'BEREC internal report on the integration of AI in the telecommunications sector', with a specific deliverable report titled 'The impact of AI on internet openness & the environment'. The project will build on BEREC's High-Level Position on Artificial Intelligence and Virtual Worlds (BoR (24) 68). In addition to that, BEREC has organised an external workshop on the ecodesign of digital services, including sessions focusing on the environmental footprint of AI. In this position, while acknowledging the environmental sustainability opportunities brought by AI, BEREC recognises the importance of taking into account the environmental footprint of AI, including electricity consumption, when considering its integration in the telecoms sector and, more largely, for greener ICT/digital infrastructures.

The objective of this project is to gather factual information on the environmental footprint of AI in relation to electronic communications networks and services (ECN/ECS) and ICT. The report will:

- establish a 'state of the art' regarding to the environmental footprint of AI;
- assess potential efficiency gains and other indirect effects linked to AI deployment, notably for ECN/ECS;
- map the supporting infrastructures required for AI computation relevant to ECN/ECS (e.g. data centres, edge computing, network functions);
- present the environmental indicators recommended by standardisation bodies in relation to AI, and;
- highlight potential levers within BEREC's remit in terms of encouraging the implementation of sustainable AI with the aim of moving towards greener digital infrastructures.

A draft BEREC report is scheduled for public consultation in Q4 2026 and will be finalized in Q1 2027, together with the BEREC report addressing the feedback from the consultation.

Reinforcing EU's resilience capabilities

The security and resilience of electronic communication networks and services is of paramount importance to the well-functioning Digital Single Market. The single market needs clear legal frameworks so that only one set of rules applies for a given matter. There must be a clear distinction between which obligations are imposed on operators, under which legal framework, and which authority is responsible for enforcement. In some countries, solutions whereby the NIS authority takes on horizontal responsibility for security across all sectors covered by the NIS framework have occurred, while sector-specific mandates remain within the competence of sector regulators (NRAs) with a long-standing role and proven experience in the particular sector. Given that telecoms regulators (NRAs) possess specific knowledge about technology and market developments in the sector, their continued involvement in issues related to security and resilience must be ensured. Different models may be used across the EU, but the essential involvement of NRAs should be guaranteed. BEREC will explore the potential role of NRAs with respect to the resilience of electronic communications networks.

Depending on the results from work carried out in 2025, the following tasks could be performed in 2026:

- Map the NRAs competences and tasks related to resilience.
- Share policy examples and best practices on resilience.
- Facilitate stakeholders dialogue.
- Produce a report with best practices.
- Provide any inputs or feedbacks to EC and/or other legislators in case of a new legislative proposal on network resilience.

- Based on the results of the work carried out in 2026, start discussion on possible harmonized methodologies for assessing network resilience.

The draft BEREC report on best practices for resilience will be adopted for public consultation at Q4 2026. The final report will be adopted at Q1 2027, along with the results of the public consultation.

Combatting fraud

BEREC and the ECASEC expert group under the umbrella of ENISA were tasked with facilitating the sharing of good practices on preventing smishing, and with preparing guidelines on preventing smishing in 2025. Based on this work, BEREC plans to work further on potential measures for combatting fraud more generally, as smishing is only one part of the broader issue of online fraud that is growing very fast. The work will include organising meetings, gathering information and relevant data, as well as the analysis of different legal frameworks, and providing inputs to possible new legislative proposals related to privacy. As part of these initial activities, BEREC will focus on identifying the current status of the matter and the most relevant developments that need to be addressed.

The final result of this work may be a document titled “Best practices on combatting fraud” to be developed in cooperation with ENISA and other partners from both the public and private sphere in Q2 2027. This report will be submitted to public consultation in Q1 2027 before final adoption.

The process will involve NRAs, electronic communications providers and their associations, equipment vendors and other stakeholders as well as European institutions such as ENISA, European Commission and Europol. ENISA and NIS CG will be consulted in the course of the work.

7. Potential work for BEREC in 2027 and beyond

In addition to the items described above, the topics in this section will be considered for the Work Programme 2027 and beyond as candidates for preparing BEREC reports, opinions, analyses or for organising workshops. The list of items mentioned below is illustrative and not intended to be exhaustive or final. BEREC will also take into account new workstreams for 2027, including those proposed by stakeholders during the various consultation phases.

The list of project deliverables will be defined during the preparation of the 2027 Work Programme over the course of 2026. To ensure the highest level of quality in BEREC’s outputs and efficiency in the work of the expert working groups, the final number of projects will remain moderate.

The following areas have been identified as potential BEREC work items for 2027:

Monitoring of IP interconnection issues

BEREC published a comprehensive Report on the IP Interconnection ecosystem (BoR (24) 177) at the end of 2024. In that report, the following conclusion was drawn: 'BEREC is aware that there are a few IP-IC disputes that have occurred since 2017, and BEREC's workshops also revealed similar insights.' Until now, no substantial evolution has been observed. In 2026, there will be no need to update the report, especially considering the anticipated changes in the regulatory framework. Therefore, BEREC will continue to closely monitor the area and will update the report at a later stage, if necessary.

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

Building on information gathered as part of the compilation of the BEREC Report on the regulation of physical infrastructure access, particularly on the information provided in section 6 on regulatory measures relating to PIA for incentivising VHCNs rollout, the aim of such a workstream would be to deepen the understanding of the interplay between symmetric and asymmetric regulation of PIA. For example, the deliverable could reflect on:

- effective implementation of PIA remedies, both in a symmetric and asymmetric setting.
- the impact of PIA regulation on the downstream markets identified in the sector.
- PIA and dark fibre as potential substitute services.
- (a)symmetric regulation application in urban/rural areas, relevant country cases and conclusions to be drawn based on the implementation.
- regulation applicable to PI operated by wholesale-only operators.
- regulation applicable to non-telecommunications operators' physical infrastructure.

The aim of this effort would be to inform the community of important practices in regulating PIA and, if possible, advise on best practices to follow when access to physical infrastructure is deemed essential for the development of effective competition.

Further BEREC work on connected and automated mobility

Connected and automated mobility (CAM) represents a transformative force across both the transport and digital ecosystems. It offers substantial potential for enhancing mobility efficiency, improving road safety, reducing the environmental footprint of the transport sector, and fostering economic growth in areas such as logistics, geospatial services and data markets. As mobility ecosystems evolve, resilient, high-performance communications infrastructure and interoperability across platforms and borders will be of critical importance in securing Europe's leadership in next-generation transport.

Realising these benefits increasingly depends on the availability of personalised, specialised and advanced connectivity services – such as low-latency network slicing and

edge computing – tailored to the needs of autonomous driving, vehicle-to-everything (V2X) communication and real-time data exchange. Mobile networks also serve as key enablers for Intelligent Transport Systems (ITS) services such as next generation eCall (NG eCall) and Cooperative ITS (C-ITS) services. Ensuring adequate quality of service and comprehensive road network coverage has been identified as a critical factor – either enabling or hindering the successful deployment of these services.

In such a context, BEREC could contribute by analysing these technical and performance requirements during a workshop debate, and by identifying any connectivity investment gaps or bottlenecks that may hinder the uptake of connected mobility. The analysis could also explore potential business models for electronic communications providers in this space.

Overall, BEREC's work would complement and support the ongoing efforts of the European Commission's to develop 5G corridors that enable seamless automated mobility across the EU.

Exchange of impact assessment practices of mobile network sharing in terms of environmental sustainability and supporting mobile network sharing indicators

The BEREC Report on Infrastructure sharing as a lever for ECN/ECS environmental sustainability (BoR (25) 68) examined how regulatory tools might enhance the environmental performance of telecommunications by minimising the footprint associated with network deployment and operation. BEREC members reported limited inclusion of environmental aspects in their decisions on infrastructure sharing, due to specific barriers such as lack of mandate, limited expertise and data, difficulty in balancing these considerations with other regulatory/policy goals (e.g. competition, cost considerations), and the need for standardised methodologies for environmental assessments. The report concluded that, to foster the sharing of impact assessment on the topic at hand, it would be relevant for BEREC to include sharing as an environmental component in its future efforts on infrastructure, in conjunction with the objectives set in its mid-term strategy. To advance the integration of environmental considerations into infrastructure sharing, further work, such as a dedicated workshop to further explore mobile network sharing from a technical and environmental perspective, may become relevant in the future. Given the higher environmental footprint of mobile networks and their more complex sharing arrangements compared to fixed networks, such a workshop would aim to deepen the understanding of the opportunities and limitations of sharing solutions such as MORAN³³,

³³ MORAN (Multi-Operator Radio Access Network): a network sharing concept where multiple mobile operators share the same radio access network infrastructure (such as antennas and base stations) but use separate spectrum bands and core networks. This allows for cost savings on physical infrastructure while maintaining the independent operation of each operator's network.

MOCN³⁴ and DSS³⁵. As the report highlights, most NRAs lack access to quantitative data on mobile infrastructure sharing which, in turn, limits their ability to assess environmental impacts. This workshop would support capacity-building, data exchange, and greater alignment on best practices to integrate sustainability into infrastructure sharing strategies.

Workshop on End User Rights

Empowering end users is one of BEREC's three strategic priorities. Connectivity and electronic communications services are now more than ever of great importance to the end users. The efficiency of the end-user rights provisions may be affected by changes in the use of different electronic communications services especially by the prevalence of digital platforms as a substitute for traditional electronic communications services.

Recent BEREC work related to end users showed importance of exchanging opinions and experiences among all relevant stakeholders in the market, relevant institutions and end users' representatives. Well informed end-users use different types of services and expect a certain quality of user experience, simplicity in contracting and using the services, security of personal data and easy switching process with effective resolution of potential problems. To achieve this goal, it is important to continuously connect all actors in the electronic communication landscape and, when forming joint actions and regulation, take into account the opinions of all relevant participants in the market, as well as regulatory aspects that are not directly related to electronic communications, but still largely affect them and influence the overall experience of using electronic communication services.

Workshops that cover several different topics related to user protection have proven to be a very good indicator of the state of the market, the impact on users and the problems that need to be solved. The workshop will be an opportunity to address the various topics related to end users, especially the impact of new Digital Network Act that is expected soon. This project will bring together regulatory bodies and civil society organisations, especially consumer organisations, to discuss all aspects that can potentially impact end users in a rapidly developing digital environment. It will cover the potential effects of consumer relevant elements such as quality of service, coverage, information, transparency, safety, fraudulent activities and relevant marketing practices.

Fostering coordination and efficient data gathering for digital markets

BEREC's tasks include promoting the modernisation, coordination and standardisation of the collection of data by NRAs. In the European electronic communications sector, data-

³⁴ MOCN (*Multi-Operator Core Network*): a more integrated form of network sharing where multiple operators share not only the radio access network but also the spectrum and sometimes core network resources. This enables even greater resource efficiency but with less separation between operators' networks.

³⁵ DSS (*Dynamic Spectrum Sharing*): A technology that allows for different generations of mobile networks (e.g. 4G and 5G) to operate simultaneously on the same frequency bands, thereby enabling flexible and efficient usage of available spectrum during network upgrades.

driven regulation has been key in informing policies and decisions to foster competition, enhance consumer welfare and contribute to more effective regulatory frameworks. As regulation evolves, policymakers' data also needs to evolve, ensuring alignment with emerging governance models, transparency requirements, and accountability frameworks.

BEREC could assess how better alignment of data collection practices across Member States (i.e. by the development of common methodological standards and peer-review exchanges on data enforcement practices), combined with technological modernisation, can materially reduce reporting burdens while improving data quality and an aid in identifying the possible need for updates of indicators.