

BREKO consultation response on the draft updated BEREC Guidelines on geographical surveys of network deployments (BoR (25) 184)

Executive summary

BREKO supports the objective of the updated Guidelines to improve consistency and comparability of geographical surveys across Member States, while keeping the reporting burden proportionate and protecting (commercially) sensitive information. The geographical survey should remain fundamentally a supply-side exercise, mapping where broadband infrastructure is available, not where it is taken up.

In that spirit, BREKO strongly supports the continued centrality of “premises passed” as the core measure for fixed network reach, and cautions against any drift towards take-up- or activation-linked indicators (i.e. “premises connected” or “premises activated”) in this context. These indicators are not measures of reach, as they reflect final-drop execution and depend on factors often outside operators’ control (e.g. in-building access, landlord consent, and end-user choice).

Purpose and scope of the Geographical Survey

The geographical survey under Article 22 EEC is intended to provide a consistent picture of the *geographic reach* of broadband networks, potentially including forecasts, to support regulatory and public policy functions (including state aid mapping and the identification of areas with market failure).

The draft is explicit that demand/take-up is not within scope of “reach”. BREKO supports this approach. Take-up is useful to track demand-side barriers (affordability, switching frictions), but reach measures network availability, independent of whether customers have already subscribed, and should be the determining parameter for any assessment of whether an area is “covered”, including decisions related to designation, public funding eligibility, and migration planning.

Defining reach through Premises Passed

In the current draft, “premises passed” is defined as in the sense that a premise is passed when an operator can provide broadband at the premises on request, without exceptional costs beyond normal connection fees, and can technically connect the end user usually within 4 weeks from the date of the request.

BREKO recommends BEREC to adjust its definition to better reflect industry standards. From our point of view the following FTTH Council Global Alliance definition of terms would be appropriate:

“Premises Passed: is the number of premises which an Operator has capability to connect to an FTTH/FTTB network in a service area, but the premises may or may not be connected to the network. Typically, new service activation will require the installation

and/or connection of a drop cable from the homes passed point (e.g. fiber-pedestal, manhole, chamber, utility-pole) to the premises, and the installation of subscriber premises equipment at the premises. This definition excludes premises that cannot be connected without further installation of substantial fiber plant such as feeder and distribution cables (fiber) to reach the property on which a potential new subscriber is located.”

BREKO understands this four-week component primarily as a capability criterion. Under normal, standard processes the operator must be able to provide complete the drop access within that timeframe after starting the process, provided that no further network extension is required. In practice, questions remain as to how “standard” and “reasonable” are applied, particularly in relation to in-house installation hurdles, capacity constraints, the need for efficient deployment of said resources or coordination of civil works.

This interpretation is consistent with the approach in the recent Digital Networks Act proposal, which similarly links copper switch-off readiness to the availability of fibre connectivity under reasonable and standard connection conditions, including a reference to a four-week component in the definition of premises passed, which should from our point of view likewise be understood as a proxy for the necessary effort on a technical and construction basis. At the same time, BREKO emphasises that this criterion cannot be interpreted as creating an individual contractual or legal right for end users to obtain a connection within four weeks. It is a mapping and technical availability benchmark for defining “premises passed” and should not be interpreted as a guaranteed consumer service level. BREKO recommends that BEREC clarifies this explicitly in the final Guidelines to avoid misinterpretation in national implementation.

In addition, BREKO points towards a discrepancy this approach of defining HP creates with the commercial “availability” databases of investing operators. These databases are used for retail and wholesale sales activities and are based on the dedicated capacity within the network deployed, attributed to specific addresses. These databases do not – and cannot – differentiate between HP with dedicated capacity within “normal distance” of the access network and HP, which may need some more effort due to longer distance or (sub-)surface conditions.

In the Guidelines, BEREC should clarify how it intends to solve this discrepancy within incurring additional administrative and reporting cost towards the investing operators.

Coherence with copper-to-fibre migration and switch-off policy

The policy direction at EU level is moving towards a rule-based copper switch-off procedure conditional on fibre availability. In the proposed Digital Networks Act, copper switch-off in designated areas is tied to sustainability conditions including at least **95 % of premises passed by fibre** (and the availability of affordable retail alternatives).

Against this background, anchoring “reach” in *premises passed* is not a technical preference, but it is essential for coherence across EU policy instruments. If “reach” is allowed to slide towards activation/take-up metrics, policymakers end up setting switch-off triggers that depend on consumer behaviour rather than network availability, which can delay migration, prolong inefficient dual running costs, and weaken investment incentives.

In addition, the discrepancy mentioned above (between dedicated capacity for specific addresses in the operator database and the “above normal cost” parameter) will structurally underestimate reach and therefore copper switch-off readiness.

In Germany, the NRA (Bundesnetzagentur) has published a recent regulatory concept on copper to fibre migration¹ proposing a threshold of **80% “homes connected” (FTTH)** to initiate the migration process. BREKO considers take-up-based thresholds such as “homes connected” to be the wrong signal for copper-to-fibre migration, as they anchor switch-off to consumer behaviour and installation frictions rather than network readiness and would materially delay the transition. By contrast, thresholds based on homes passed reflect actual availability and provide the only credible basis for an earlier, clear and predictable migration path, including switch-off planning, once fibre is broadly in place.

In addition, BREKO supports a dedicated layer/database which identifies (still) active copper users who will need to be served with fiber or auxiliary services in the event of Copper Switch Off.

Keeping Geographical Surveys deliverable in practice

BREKO supports the aim of harmonisation, but the Guidelines should remain implementable for smaller and regional operators as well as wholesale-only access providers. The draft recognises that some operators may lack GIS tools and that NRAs can support them (including by providing reference tools/databases or allowing simpler formats where justified). This proportionality needs to be preserved in implementation. In particular, NRAs should facilitate compliance through standardised templates so that comparable outputs can be delivered without requiring every operator to build complex GIS systems.

Furthermore, the draft needs to reflect the inherent discrepancy between meaningful operator databases focusing on availability (for example through address-dedicated capacity in the access network) and this HP definition. In extremis this will force operators to build and feed an additional database without operational or commercial meaning solely for NRA purposes.

Publication and confidentiality safeguards

¹ [Regulierungskonzept der Bundesnetzagentur zur Kupfer-Glas-Migration](#), January 2026

BREKO agrees that end-users should have access to meaningful information tools on service availability, but publication must not expose (business-)sensitive infrastructure data. The draft acknowledges confidentiality constraints and the need to consider aggregation approaches and data protection, especially where exact geocoded points are used.

As mentioned above, service availability is strongly linked to dedicated capacity (mini ducts & fibers) in the access network, not to a threshold distance between the access network in public grounds and the actual building. Therefore, the definition favored in this draft does not related to the commercial availability databases of investing operators.

With this also in mind, BREKO encourages BEREC to reinforce the principle that public-facing outputs should be based on the minimum level of detail needed for consumer choice, while ensuring operators' competitively sensitive roll-out and network details remain protected. BREKO therefore supports a publication approach that prioritises consumer usefulness through maps and address look-up tools, while avoiding bulk disclosure of operator-specific, address-level datasets that could reveal rollout strategy and undermine competition.

Closing remarks

BREKO supports most of the updated Guidelines and a meaningful direction towards greater consistency in geographical surveys, based on available datasets by the operators. The survey should measure reach as network availability, not demand. This requires keeping "premises passed" as the central indicator for fixed reach, streamlining reporting obligations to avoid discrepancies, duplication and additional burdens, and ensuring robust confidentiality safeguards so that publication and transparency measures do not expose competitively sensitive data or indirectly turn take-up reporting into a de facto requirement.

About BREKO

As Germany's leading fibre-optic association, BREKO advocates for fair and effective competition in the German telecommunications market. With more than 500 members including over 260 network operators, BREKO's membership is firmly committed to future-proof fibre connectivity and accounts for more than 60% of fibre deployment in Germany.

BREKO is registered in the lobby register (R002215) for the representation of interests vis-à-vis the German Bundestag and the Federal Government and in the European transparency register (028570718529-43) for the representation of interests vis-à-vis the EU institutions.