



The European
Broadband
Competence
Offices
Network

Activity Report
2025-2026



Introducing The BCO Network



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The European Broadband Competence Offices Network is a European Commission initiative supporting Member States to reach the **2030 Digital Decade connectivity targets**:

Access to 1 Gbps for all citizens and 5G coverage in all populated areas by 2030

Digitalisation is one of the top priorities of the European Commission because it has the potential to unleash growth, competition, investment and innovation, while creating new sources of employment. In order to bring the full social, economic and environmental benefits of the Digital Single Market to all citizens, a digital transformation in both rural and urban areas is needed.

To achieve this transformation, widespread deployment and uptake of very high capacity networks is a necessity throughout the European Union.

The BCO Network exists to support Member States and regions in achieving this.

What are BCOs?

Broadband Competence Offices (BCOs) are the national and regional public entities responsible for advising public authorities, policy makers, project promoters and citizens on broadband and the technological, legal and financial challenges of implementing broadband deployment projects.

What is the BCO Network?

The BCO Network brings together national and regional public authorities in charge of broadband deployment with the objective of increasing their knowledge and capacity to reach the EU's connectivity targets, and bring the benefits of connectivity and the Digital Single Market to all citizens.

How does the EU support BCOs?

The BCO Network is supported by a dedicated Support Facility, set up by the European Commission in 2017.

The Support Facility designs and animates an annual capacity-building programme for BCOs, promoting the exchange of knowledge, experience and good practices between the BCOs and with the European Commission. The programme is designed in close collaboration with the BCOs and the Commission's Directorates-General for Agriculture and Rural Development; Regional and Urban Policy; Communications Networks, Content and Technology; and Competition.

The Support Facility's activities are guided by three objectives:

Connect, share knowledge and build capacity across the Network, by:

- Bringing BCOs, experts and European Commission officials together to bring clarity to the legal, technological and financial concerns of broadband planning and implementation, with a particular emphasis on State aid and rural deployment
- Exchanging experiences and good practices
- Facilitating dialogue on the needs and challenges specific to different frameworks, environments and economies.

Expand the Network, by:

- Encouraging regional BCOs to participate in and gain from the Network, as well as to share their experiences for the benefit of all the members
- Supporting greater engagement between national and regional BCOs

Strengthen the Network at EU, national and regional level, by:

- Empowering BCOs through increasing awareness and understanding among their stakeholders of how BCOs can support them in broadband planning and deployment
- Reinforcing connections with key partners such as the EU CAP Network.



The Network in the words of the BCOs

"It is important to be able to discuss dilemmas with others who have solved them or face the same ones."

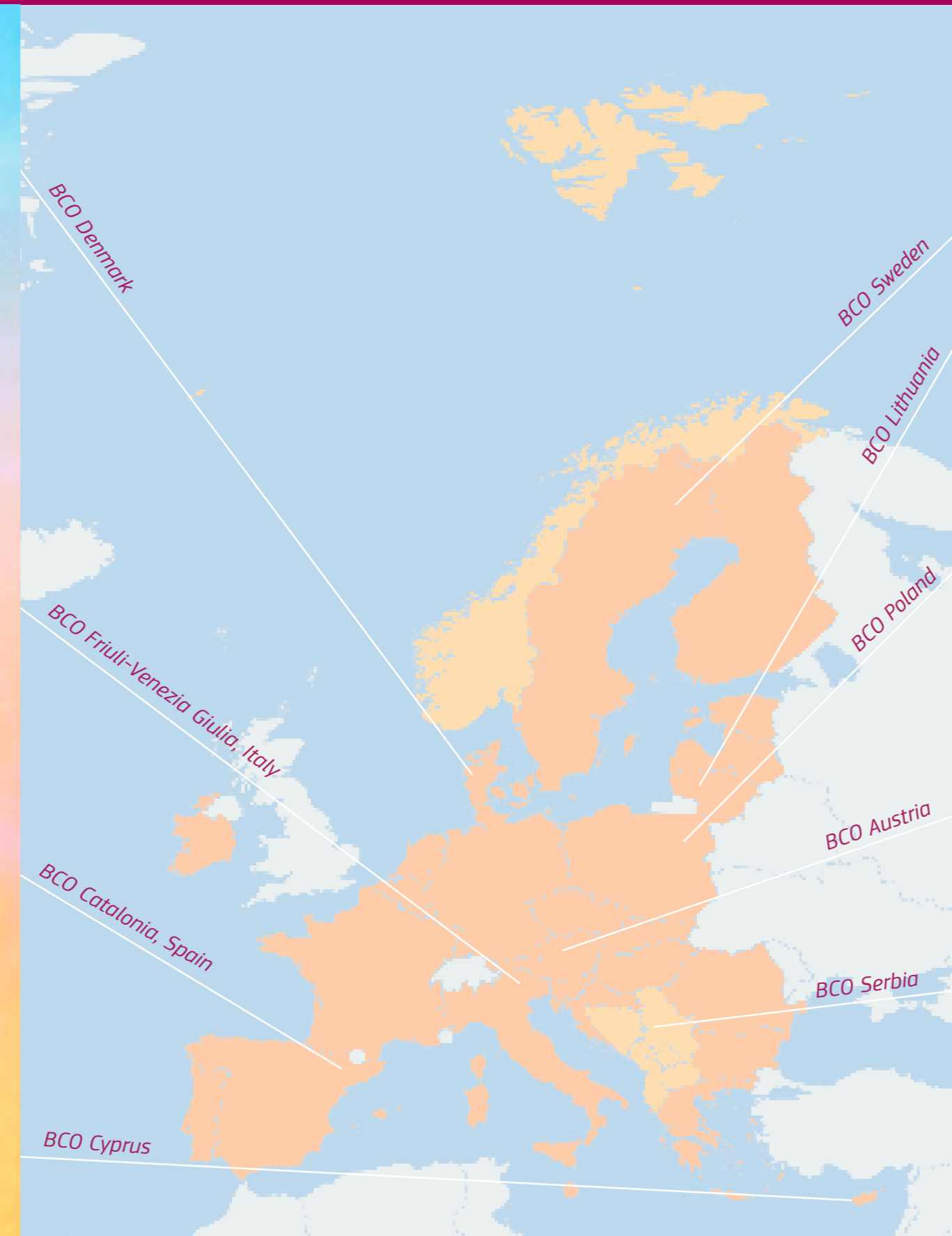
"The BCO Network Support Facility gave an excellent opportunity for training in subjects that are crucial for day by day working."

Furthermore, the Support Facility kept an excellent connection with all relevant departments of the Commission and allowed our regional BCO to manage issues very efficiently.

Last but not least, the Support Facility allowed us to stay in touch with similar regional offices all over the Europe, giving us the opportunity to get experience and be inspired by other innovative solutions."

"Our experience is that the BCO Network is a valuable tool for us, not only for contacting Commission representatives, but also for finding out about new trends. It is an important window for seeing what is happening in Europe. Unofficial contacts during BCO Network events are also very useful."

"The BCO Network is doing an excellent job by helping EU countries on broadband-related issues. BCO Cyprus is very happy for all the support taken from the BCO Network Support Facility and the great collaboration we have with all the people from the Network."



"The BCO Network has provided a new arena for international co-operation on broadband development and the BCO Network Support Facility has done an excellent job in providing useful information and meetings."

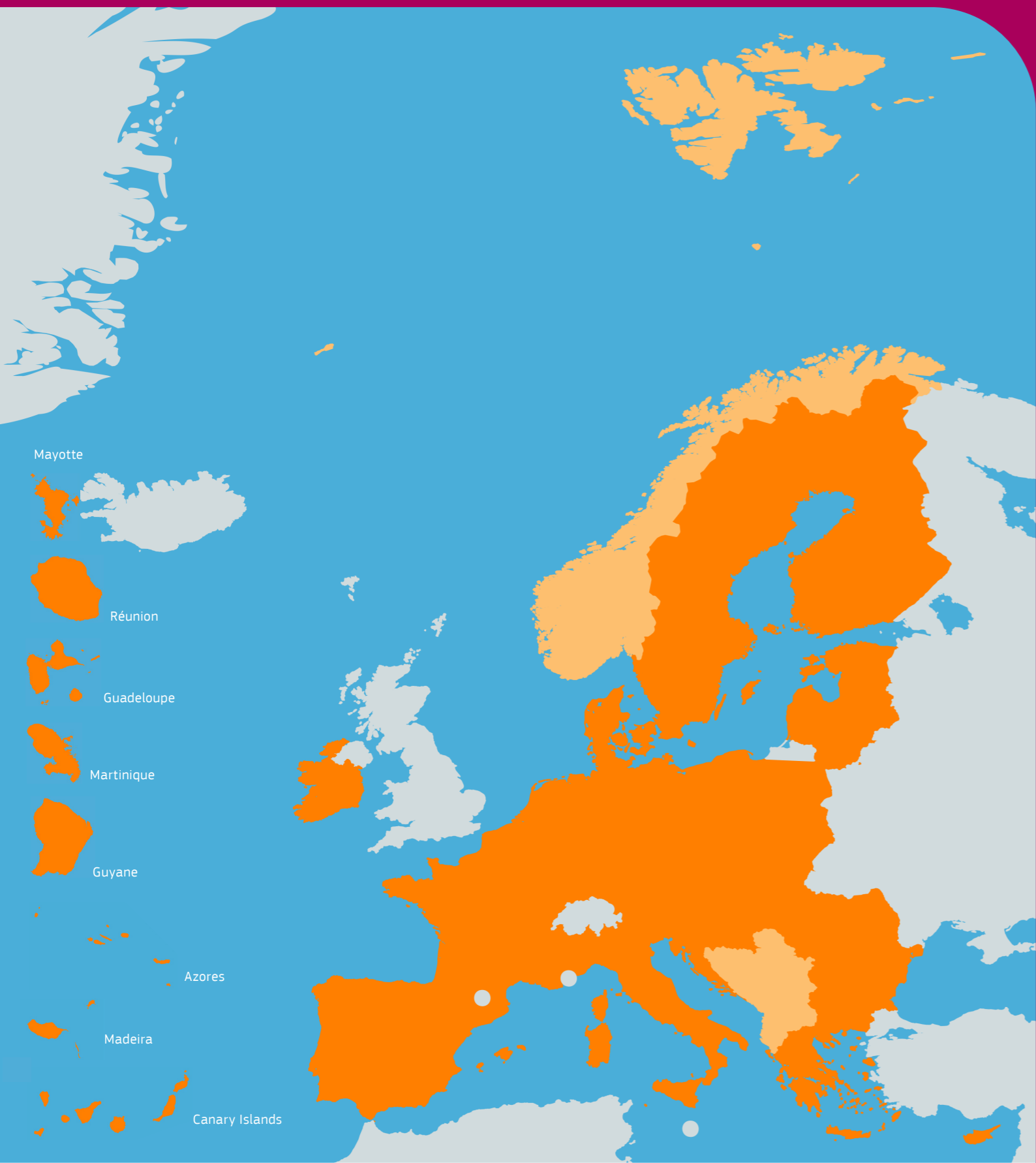
"Exchange of good practices is always important in shaping national broadband plans and creating investment models."

"The Polish BCO considers the Network to be a key platform for exchanging knowledge and expertise, and for the unification of still different approaches to legal environments among Member States."

"The BCO Network enables us to meet Broadband Competence Offices from all over Europe and officials from the Commission on a regular basis. It has become for Austria a very important initiative, especially for sharing best practices, which helps us to implement the right solutions back home."

"The most useful initiative that exists currently."

The BCO Network is present in 34 countries



Explore

Find the latest news and publications all in one place on [BCOnetwork.eu](https://bconetwork.eu)

Explore good practices in broadband projects and BCO services, as well as EU policy and funding, through the [BCO Network video interview series](#) and [Digital Strategy Library](#)

Receive news by email via the [Digital Strategy newsletters](#)

Get answers to the most frequently asked questions on the BCO Network in the [FAQ page](#)

THE BROADBAND COMPETENCE OFFICES (BCOs) NETWORK

BRINGS TOGETHER EUROPEAN PUBLIC AUTHORITIES
& BROADBAND STAKEHOLDERS
TO DRIVE DIGITAL CONNECTIVITY IN EUROPE



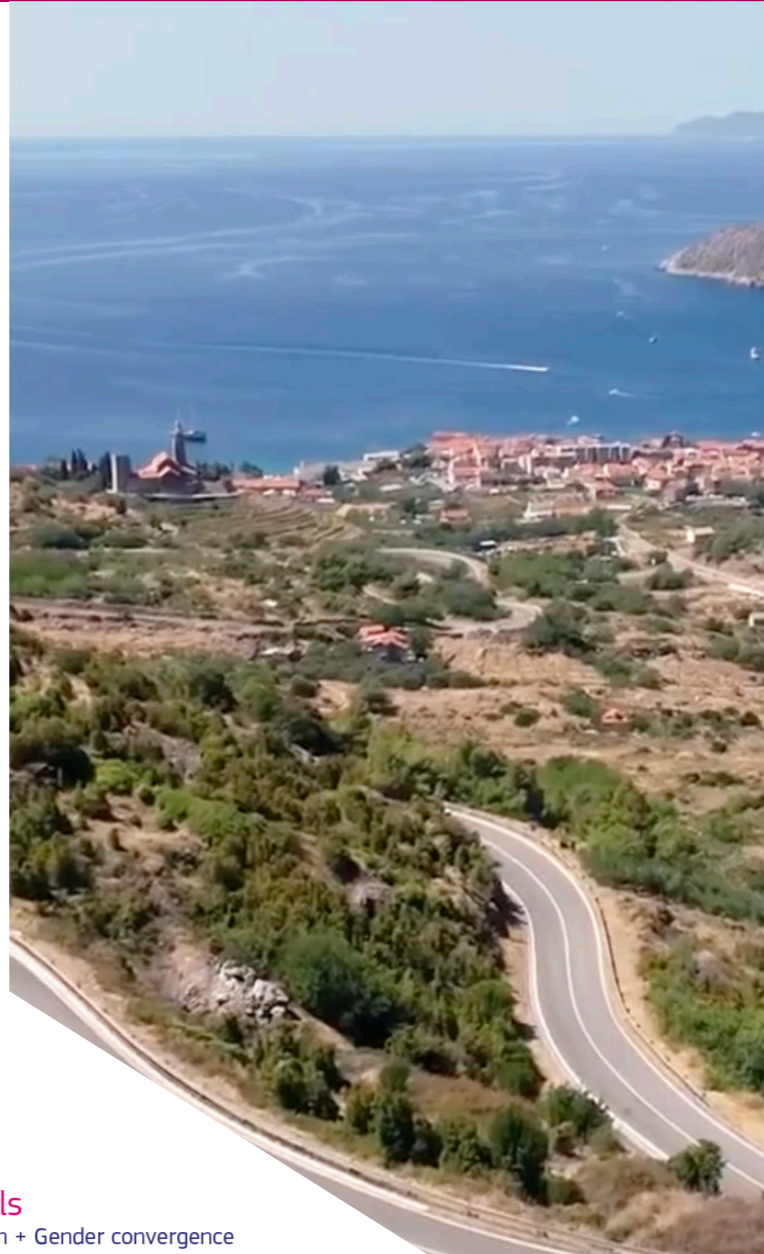
The Digital Decade

The EU is pursuing a human-centric, sustainable vision for digital society throughout the digital decade to empower citizens and businesses.

Digital society and digital technologies bring with them new ways to learn, entertain, work, explore, and fulfil ambitions. They also bring new freedoms and rights, and give EU citizens the opportunity to reach out beyond physical communities, geographical locations, and social positions. However, there are still many challenges associated with the digital transformation.

Europe's Digital Decade is where:

- everyone has the skills to use everyday technology
- **connectivity** reaches people living in villages, mountains and remote areas, so everyone can reach online opportunities and participate in the benefits of the digital society.
- key public services and administrative procedures are online for the convenience of citizens and businesses.

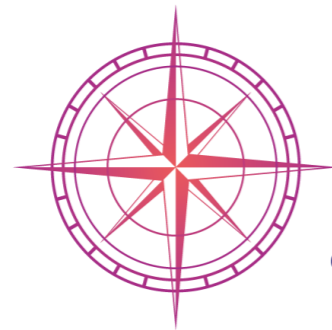


Skills

ICT Specialists: 20 million + Gender convergence
Basic Digital Skills: min 80% of population

Public Services

Key Public Services: 100% online
e-Health: 100% availability medical records
Digital Identity: 80% citizens using digital ID



Infrastructures

Connectivity: Gigabit for everyone, 5G everywhere
Cutting edge Semiconductors: double EU share in global production
Data – Edge & Cloud: 10,000 climate neutral highly secure edge nodes
Computing: first computer with quantum acceleration

Business

Tech up-take: 75% of EU companies using Cloud/AI/Big Data
Innovators: grow scale ups & finance to double EU Unicorns
Late adopters: more than 90% of European SMEs reach at least a basic level of digital intensity

The Digital Decade targets

The Digital Decade targets are outlined in the Digital Compass, below, and can be summarised as four overarching goals:

1. a digitally skilled population and highly skilled digital professionals
2. **secure and sustainable digital infrastructures**
3. digital transformation of businesses
4. digitalisation of public services.

The Digital Decade objectives

Alongside the targets, the Digital Decade objectives will ensure that the digital transformation in Europe benefits all people.

The objectives can be summarised as follows:

- A safe and secure digital world
- Everyone can participate in digital opportunities; no one is left behind
- Small businesses and industry have access to data
- Start-ups and SMEs have access to digital tech
- Innovative infrastructures converge to work together
- SMEs can compete in the digital world on fair terms
- Public services are readily available online
- Research is focussed on developing and measuring the impact of sustainable, energy and resource efficient innovations
- All organisations can ensure cybersecurity

2026 outlook

Many topics of high concern for BCOs will be on the agenda in Brussels in 2026, including, among others:

- *The Digital Network Act*
- *The Cybersecurity Act*
- *The Revision of the Digital Decade Indicators*
- *Quality of Service for 5G reporting*
- *Multi-Annual Financial Framework discussions*
- *Launch of the Cable Projects of European Interest*
- *Toolkit on subsea cable security*



SCAN ME

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Opening remarks

Jan Dröge - Support Facility Lead

Another year of the BCO Network comes to an end. We have come a long way in the past eight years. From an idea, the BCO Network has blossomed into an active and well established group of like-minded stakeholders. The continuous engagement of representatives from all Member States is testimony to the growing value of the Network. The continuous support of the Commission remains a key building block of this success.

The involvement of BCOs as key partners in several EU initiatives is further proof of the value the BCOs bring not just in their national context, but also at European level. We have notably seen BCOs become key enablers for the **allocation of EU funds to broadband investment** under Cohesion Policy. Similarly for the programming of Recovery and Resilience Facility funding, most countries relied on the BCOs for the required 'reform' part. Most recently, the importance of BCOs has been reiterated in the [Commission's Communication in support of the EU's eastern regions bordering Russia, Belarus and Ukraine](#).

This growing reliance of the Commission on the BCOs is understandable in a context where the EU funds allocated to broadband investment have grown from **€6 billion to €16 billion**: the BCOs are the key enablers of **successful planning and implementation of public support in broadband investment**.

For many of the 2030 connectivity targets, we see good progress across the EU. However, for remote and rural areas, challenges remain. This is further exacerbated by the **renewed need for investment in stand-alone 5G**, going beyond what had been planned for fibre roll out. As such, the role of BCOs remains crucial in the years ahead.

The role of BCOs goes well beyond planning of aid. Indeed, BCOs also play a crucial role for the **planning and implementation of the regulatory environment**, which will enable investment in Europe's digital future and autonomy.

2025 has seen the adoption of the **Gigabit Infrastructure Act** (GIA). In 2026 the **Digital Network Act** as well as the **Cybersecurity Act** will be shaped, preparing the regulatory environment of the future for our industry.

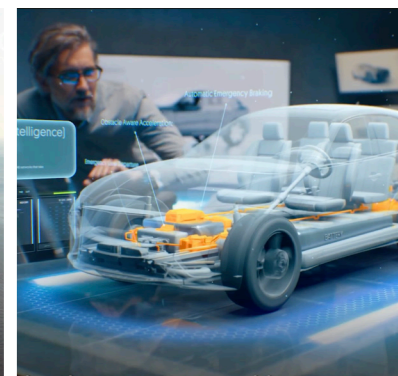
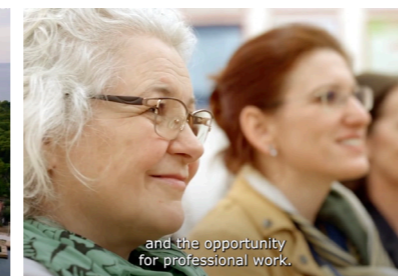
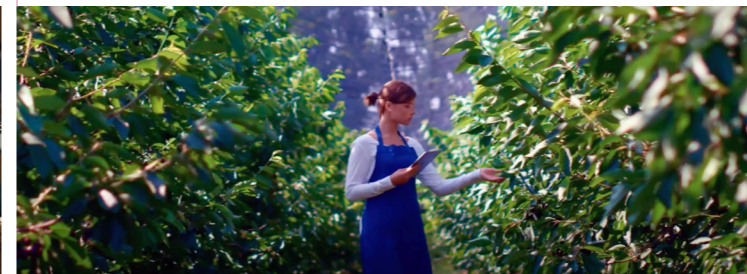
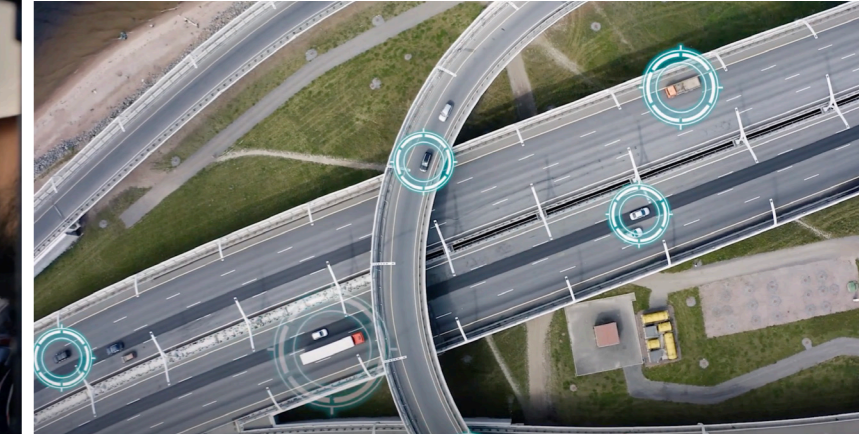
The BCO Network acts both as **contributor at the policy development stage** as well as **guarantor of its implementation** in the future.

Of course, 2026 will also be marked by the discussions on the **future of the Multi-annual Financial Framework** (MFF). The last three MFFs have seen incremental growth in fund allocation to digital infrastructure:

- 2007-2013: €2 billion
- 2014-2020: €6 billion
- 2021-2027: €16 billion

The proposed structure of the 2028-2034 budget will be significantly different. **Allocations to digital infrastructure might not have the same prominence as they had in the past**; BCOs will therefore have to play an important role to **ensure that the required funds remain available to cover the digital divide that might still remain in 2028**.

As the secretariat of the BCO Network, we will continue to serve both the BCOs and the Commission, fostering dialogue and exchange between the BCOs as well as with the Commission.



Sharing knowledge Building capacity



The BCO Network connects, shares knowledge and builds capacity through an annual programme of training and thematic events, bilateral dialogue between BCO representatives and the European Commission, as well as online training and multimedia resources.

The programme is tailored to the needs of the Network members, and enables BCOs to exchange experiences and good practices with peers and experts, as well as obtain direct guidance from European Commission representatives on complex issues and specific project hurdles.

2025-26 WEBseries



Season 16 April - July

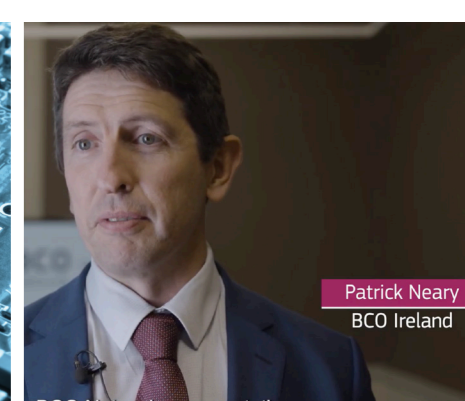
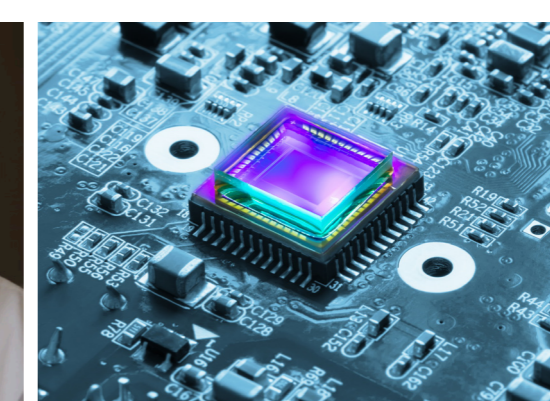
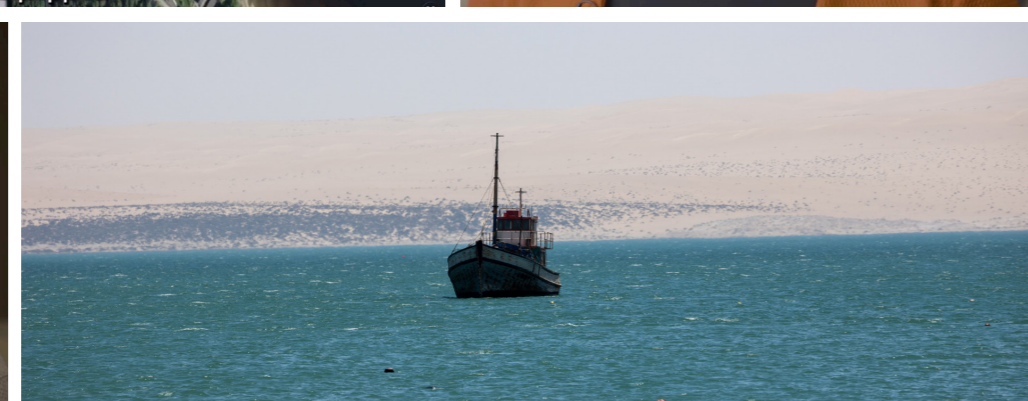
- Portuguese case study on 5G for public administrations
- Measuring environmental impact of data centres
- Gigabit Infrastructure Act (GIA): mobile infrastructure deployment under the new regime, including fair and reasonable prices
- Innovation Valley Digital Strategy
- 5G quality of service assessment methodology
- Emerging requirements for Single Information Points (SIPs) under GIA
- Digital Accessibility in the EU: territorial patterns and trends of broadband networks
- The EU Space Agency digital space applications: the example of CASSINI

Season 17 September - December

- Main findings from the new 5G Observatory
- Design and tendering for a public quantum network
- Cloud and artificial intelligence Important Project of Common European Interest (IPCEI) status and next steps
- Infrastructure sharing in remote markets
- Cloud interoperability study
- 5G quality of service for mobile networks
- Evolving backbone needs: the growth of data centres
- How to bridge the digital gap: two examples of successful broadband deployment in remote areas

Season 18 January - March

- Cyprus Presidency of the Council of the EU: digital priorities
- Seal of Excellence
- GIA: open questions and outstanding issues in Czechia
- Simplified cost model: lessons learned
- GIA and SIP requirements in Croatia
- ASTEIO Observatory: data and findings
- The Digital Networks Acts





In-country workshop: Zagreb

BCO Croatia and the BCO Support Facility organised an in-person gathering in Zagreb, in June 2025. Held at the National and University Library, this two-day workshop offered BCOs the opportunity to explore:

- BCO Croatia's aid scheme and activities
- Quantum-ready networks for the next generation of secure connectivity
- Funding for connectivity post 2027
- Subsea cables
- The future of the BCO Network
- A1 Croatia: broadband infrastructure development projects

These discussions were complemented by a field visit to see fibre optic infrastructure deployment.

The event began with opening remarks by Mislav Hebel, Deputy President of HAKOM Croatia's BCO, Angelo Cerqueti, DG AGRI Programme Manager, and Guido Acchioni, DG CNECT Policy Officer. During his speech, Mr Hebel offered a gift to Mr Acchioni ahead of his upcoming retirement, in recognition of his significant contributions to the Network since its inception.

BCO Croatia's aid scheme and activities

Ivana Madžar and Julijana Jančula Bauer, Senior Broadband Access Experts, and Vesna Gabrić Kešina, Senior Legal Adviser, presented the EU funded aid scheme for rural areas in Croatia. The scheme has attracted interest from several operators and contributed to making the Croatia telecom market more competitive.

Quantum-ready networks for the next generation of secure connectivity

Mario Stipčević, Head of the Photonics and Quantum Optics Unit at the Ruđer Bošković Institute presented the Croatian centre of excellence on quantum. The focus was on Croatian participation in the CEF-funded quantum pilots.

Roundtable

Funding for connectivity post-2027

Elena Galindo, Area Coordinator, BCO Spain, explained how even in a country such as Spain, where progress in rural connectivity has been very significant some gaps remain and funding will be necessary beyond 2027.

Marcin Łukasiewicz, Chief Expert, BCO Poland, shared insights on how national and EU funds

can be combined for broadband investments. Poland has been one of the countries with the highest EU budget for connectivity and has been very successful in planning and deploying these resources.

Iva Novak, Director for Strategic planning and coordination of EU Funds, Croatian Ministry of Regional Development and EU Funds, shared insights into the negotiation process on the future MFF. She also gave some indication of how BCOs can engage with their respective national Ministry leading the negotiations to ensure continued support for digital infrastructure.

Presentation and roundtable Submarine cables

Ms Rebecca Nottingham gave a keynote presentation of the study carried out with the BCO Network Support Facility on the future investment needs of subsea cables. In the subsequent round table, the findings and recommendations were discussed by a panel of experts:

- George Pantos, Head of Directorate of Broadband and Electronic Communications Networks, BCO Greece
- Dan-Mihai Chirila, Policy Officer, European Commission, DG CNECT
- Pietro Pantalissi, Officer, European Commission, DG COMP

- Elizabeth Sandström, Swedish Coordinator for Connecting Europe Facility 2 (CEF2 Digital), BCO Sweden

Roundtable

Future of the BCO Network

Odyseas Cartalos, Senior Expert Research, Schuman Associates, presented the key findings of a study on the future needs of BCOs.

These findings were discussed in several breakout groups, animated by Eduard Falco Artieda, Consultant, Government of Catalonia, BCO Catalonia, and Caspar Von Preysing, Head of the federal Gigabit Bureau, BCO Germany.

A consensus emerged that the need will remain for BCOs and a BCO Network. The roles and tasks of the Network would need to evolve to embrace the changing technical ecosystem around connected collaborative computing, known as 3C, as well as the evolving political needs on autonomy and cybersecurity.

Field visit

On the second day, BCO Croatia arranged a very informative field trip to one of the deployment areas outside of Zagreb. The presentations of the aid beneficiaries allowed to get a deeper insight into the impact of the EU funds and the challenges specific to the Croatian market.



EU Regions Week: ‘Connected to stay’ Investing in digital connectivity for Europe’s rural, remote and outermost regions

The BCO Support Facility, in collaboration with DG AGRI and the European Commission’s Health and Digital Executive Agency (HaDEA), hosted a workshop during the 2025 EU Regions Week on the topic of ‘The right to stay: unlocking the potential of every territory’.

Held in Brussels on 15 October, the session highlighted the strategic importance of scaling up investments in digital infrastructure, particularly high-quality backbone and mobile networks, in Europe’s rural, remote, and outermost regions. By showcasing success stories from EU-funded digital connectivity and 5G deployment projects, through examples from HaDEA, and CEF Digital-funded projects in the Azores and Danube Delta, the session demonstrated how digital infrastructure can enable access to essential public services, foster innovation, and stimulate local economies.

The discussions explored how improved connectivity contributes to socio-economic resilience and helps reduce emigration by making regions more attractive and viable places to live and work. It underlined the need to complement infrastructure investment with support for digital skills to ensure that connectivity translates into real, inclusive, and lasting impact.

Ultimately, the session positioned rural, remote, and outermost areas not as lagging behind, but as leaders in shaping smart, sustainable, and connected communities.

The speakers were:

- Luis Vivas-Alegre – DG AGRI, Head of Sector for Research and Innovation
- Hervé Dupuy – HaDEA, Head of Unit for the Connecting Europe Facility – Digital programme
- Ana Ciobanu – Orange Fab, Romania, Start-up Programmes Manager
- João Beleza Vaz – Portuguese National Communication Authority – ANACOM, Director of the Azores Delegation, and lead representative of the Portuguese regional BCO of the Azores

The workshop was moderated by Ashya Lane-Spollen, Deputy Lead of the BCO-SF.

Highlights

DG AGRI keynote speaker, Luis Vivas-Alegre

Digitalisation and connectivity are essential instruments for achieving the EU’s goals for sustainable and competitive rural areas, underpinning the transition to more efficient, data-driven, and environmentally responsible farming systems, and creating the conditions for vibrant local economies. Mr Vivas-Alegre outlined four essential elements to this end:

- Digitalisation as a cross-cutting priority in EU rural policy frameworks, such as under the Common Agricultural Policy (CAP) and Horizon Europe;
- Ensuring that rural stakeholders are directly involved in designing and trialling new technologies (through EU research and innovation policy, for example) so that digital solutions are adapted to local contexts and research results are turned into practical, scalable outcomes;
- Building a data-driven agricultural ecosystem by improving access to connectivity and shared data infrastructures, and making digital tools more usable and beneficial for all actors in rural areas (through initiatives like the newly launched Partnership on Agricultural Data under Horizon Europe, for example);
- Embedding connectivity in competitiveness and cohesion goals and EU funding programmes (such as through the revision of the EU Rural Action Plan, the preparation of the next Multiannual Financial Framework (MFF), and the proposed European Competitiveness Fund), so that investments not only aim to close the digital divide but also make connectivity a foundation for innovation, economic diversification, and territorial cohesion across Europe’s rural, remote, and outermost regions.

DG CNECT, HaDEA, Hervé Dupuy

Mr Dupuy introduced HaDEA, highlighting noteworthy initiatives and achievements, notably under WiFi4EU and the Connecting Europe Facility (CEF) Digital programme’s calls for ‘Backbone connectivity for Digital Global Gateways’, ‘5G along Transport Corridors’ and ‘5G and Edge Cloud for Smart Communities’. Mr Dupuy underlined that EU investments in digital backbones and 5G networks are not only about access, but about reshaping Europe’s connectivity geography: linking remote and outermost regions to global routes and

advanced digital services turns them into strategic gateways of resilience, innovation, and inclusion.

OrangeFab Romania, 5G Connected Danube Delta, Ana Ciobanu

Ms Ciobanu presented 5G Connected Danube Delta (5G CDD), a CEF Digital-funded project pioneering the deployment of advanced 5G connectivity in one of Europe’s most remote and environmentally sensitive areas, and of use cases in telemedicine, immersive education, real-time environmental monitoring, and sustainable tourism. A key factor of the project’s success and long-term impact is the importance placed on local partnerships, collaboration and capacity building, particularly to enable local users across generations to make the most of the new possibilities and services.

ANACOM / BCO Azores, João Beleza Vaz

The Azores archipelago are a powerful example of how, in remote areas, digital networks are critical for regional cohesion, access to services and institutions, and the population’s daily online and digital activities. With FTTH coverage above 90% and 5G reaching 75-95% of the population, connectivity now underpins e-health, e-learning, and public administration across the islands. Expanding affordable access through the regional public Wi-Fi network, the Azores employs open-access principles and wholesale models as key to closing remaining last-mile gaps in remote communities. The resilience of this connectivity is underpinned by submarine cables between the islands and connecting the Azores to the Portuguese mainland, modernisation work on which is funded through CEF Digital. This investment is all the more important due not only to the region’s relative geographic remoteness from mainland Europe, but also in the context of its seismic and volcanic activity.

Improved digital infrastructure is enabling new sectors to take root in the Azores. Examples highlighted by Mr Beleza Vaz include a Free Technological Zone that supports maritime and aerial testing, as well as emerging space and ocean research clusters which attract investment and high-skilled jobs. Connectivity has shifted “from barrier to driver”, turning the Azores into a living laboratory for green, blue, and digital innovation.

Audience discussion key takeaways

- Bridging the digital divide means investing in people, not just networks; and digital inclusion requires both skills and accessible, human-centric design.
- Local intermediaries are crucial enablers of inclusion and uptake; and partnerships between public authorities, operators and civil society deliver real impact.
- EU programmes can scale up digital inclusion:
 - continued and expanded investment in community-based digital education and user-centred service design is needed in the next programming period.
 - participants voiced concern that future cuts to cohesion and rural development funding could threaten the progress made in rural connectivity. Experience from small municipalities shows that layered financing, from LEADER to ERDF and

WiFi4EU, has been critical in delivering full territorial coverage.

- the European Commission’s proposal for the next Multiannual Financial Framework (post-2027) foresees the creation of a European Competitiveness Fund, consolidating digital-related investments under a single, larger and more flexible envelope, potentially five times the size of current programmes. Access to future funding will require closer partnership with Member States and regions, an approach which intends to strengthen alignment with local priorities and ensure that digital connectivity projects remain closely tied to community needs.
- Digitalisation now cuts across every sector, so coordination is key: on this point, Mr Dupuy confirmed that the European Commission is addressing this through a comprehensive policy framework led by DG CNECT, as well as the EU’s Digital Decade strategy and reporting, which provides the common vision and metrics. He also noted that the Digital Decade Policy Programme sets measurable targets for connectivity, digital skills, digital transformation of businesses and public services by 2030, serving as Europe’s shared roadmap for a holistic, cross-sectoral digital transition, ensuring that progress in rural and remote regions is part of a wider strategic effort.
- Knowledge-sharing is a vital resource when budgets are tight: municipalities and BCOs can make better use of limited funds by exchanging experiences and learning from each other’s success stories. Building a repository of good practices and replicable project models can help communities deliver high-impact connectivity with fewer resources.

Conclusions

The discussions made clear that connectivity alone is not enough: it must be inclusive, resilient, and people-centred to ensure that every territory can participate fully in Europe’s digital decade. Sustained investment, coordinated action, and advocacy at all levels will be essential to keep rural, remote, and outermost regions connected, not only to stay, but to prosper:

- The ‘right to stay’ depends on creating the conditions for people and businesses to thrive locally, turning digital policy into a driver of social and economic cohesion. In rural and remote areas, digital connectivity is essential for equal access to healthcare, education and economic opportunity. It underpins both sustainability and economic diversification, offering an engine of innovation and skilled employment, and is a prerequisite for equal participation and territorial cohesion across Europe. It also creates new strategic routes linking Europe with the wider world, repositioning peripheries as connectivity gateways and transforming geographic remoteness into geopolitical and economic relevance.
- Connectivity alone is not enough: it must be paired with local partnerships, capacity building, and relevant use-cases in order to transform connectivity into real opportunity, through the community co-creation model.

2025 BCO Network Conference

The 2025 BCO Network Annual Conference brought together national and regional Broadband Competence Offices and representatives from the European Commission, to exchange insights on key digital infrastructure policy and funding developments, and foster deeper collaboration. Held on 6 October in Brussels, the discussions reflected Europe's ongoing effort to strengthen its digital infrastructure, accelerate network deployment, and modernise its regulatory framework. Participants examined how to close the investment gap in telecommunications, promote demand up-take, and ensure that regulation supports rather than constrains innovation.

Highlights

Opening address

Carlota Reyners Fontana, Director for Markets and cases II: Information Technology, Communication and Media, DG COMP

Ms Reyners Fontana underscored the Commission's commitment to broadband deployment and digital transformation, highlighting significant investments approved. She noted the role of the BCO Network in making the State aid notification process smoother, leading to more support schemes in market failure areas. Ms Reyners Fontana concluded that more is needed in terms of fibre and 5G in underserved areas, to ensure competitiveness and cohesion.

Outlook on the future MFF: the continuous importance of support to rural and underserved areas

Mario Milouchev, Director CAP Strategic Plans II, DG AGRI

Mr Milouchev called on BCOs to ensure that rural digital connectivity deployment is prioritised in their National and Regional Partnership Plans, setting specific broadband objectives and building a tailored package of measures with a territorial and rural focus where needed, resulting in faster decisions, cleaner coordination, and delivery that matches real local needs. Mr Milouchev highlighted that the current deployment pace would only achieve full Very High-Capacity Network coverage by 2051, stressing the urgency of closing both the coverage and quality gaps with urban areas. Mr Milouchev concluded that the economic,

social and demographic needs are urgent, on the one hand, and there is a strategic opportunity on the other, as rural Europe hosts cutting-edge industries and offers vast clean energy potential. With the right connectivity opportunities, these assets can boost growth and help keep people rooted in their communities.

Roundtable I: What drives up-take?

Jan Dröge, BCO-SF

Andronikos Kakkouras, BCO Cyprus

Caspar Von Preysing, BCO Germany

Raigo Iling, BCO Estonia

Innocenzo Genna, Italian Presidency of the Council of Ministers Advisor

Jan Dröge warned that service quality is as vital as coverage, pointing to ongoing work with the Commission on common service standards. BCOs from Cyprus, Germany and Estonia shared contrasting evidence on what drives uptake.

In Cyprus, a state-aid scheme helped deliver a 24% increase in fibre uptake by combining competitive offers, higher speeds and provider–customer engagement. In Germany, the emphasis is on demand aggregation and deployment subsidies, but uptake remains limited where fibre's higher cost often outweighs its perceived advantages over existing copper or mobile services. In Estonia, measures have raised uptake by approximately 10–20%, including a small voucher scheme which improved connectivity for some remote households, but had limited impact on broader, sustained uptake. Italy echoed this dynamic: public support has accelerated roll-out where legacy networks are weak, but uptake still lags when households see little added value in upgrading to fibre. Czechia reported addressing this through sustained coordination with municipalities and operators. Friuli Venezia Giulia highlighted the downside of overlapping networks and aggressive pricing, which can confuse consumers and distort uptake.

On the regulatory side, panellists stressed that stable, predictable rules are key to investment and fair competition, supported by robust mapping of underserved areas, coordinated civil works.

The roundtable concluded that uptake depends on quality, affordability, targeted engagement, and effective policy design and monitoring, rather than on coverage alone.

Roundtable II: Lessons learned from the European Electronic Communications Code (EECC)

Innocenzo Genna, Italian Presidency of the Council of Ministers - Advisor

Michel Van Bellinghen, IBT

Ines Nolasco, Vodafone

Anton Horshkov, Deutsche Telekom

Thomas Volmer, Netflix

The EECC, implemented from 2016 to promote competition through regulated network access, is now due for review. A sharp divide exists whereby operators argue regulation has become too heavy and discourages investment, while digital and content platforms defend the current model as essential for openness and fair access. To discuss this, the second roundtable introduced four private sector speakers contributing vital perspectives from the regulatory, telecom operators, and content providers' sides.

Ms Nolasco and Mr Horshkov argued that Europe's framework, once central to fostering competition, has become overly restrictive and now dampens investment. Referring to widely cited diagnoses of underinvestment and declining competitiveness, they warned that returns on capital below cost levels risk constraining long-term network expansion. Their proposed direction was more flexible, investment-oriented rules, enabling co-investment models and greater market scale, while keeping competition safeguards proportionate.

Mr Van Bellinghen acknowledged the need to unlock investment but stressed that competition remains essential for consumers and innovation. He highlighted the importance of stable rules, long-term spectrum policy and balanced market structures, and pointed to examples where effective access to passive infrastructure supported strong rollout, as seen in Spain and Portugal.

Mr Volmer argued that the current framework already supports connectivity and that online services help drive broadband demand, citing streaming as a contributor to fibre take-up. He noted OECD evidence that the EU performs strongly in some areas but with wide differences across Member States, and questioned whether a single top-down approach is warranted. He also cautioned that extending telecom-style regulation to non-telecom digital services could discourage innovation and investment.

The discussion converged on the need to accelerate investment to meet 2030 connectivity targets and to retain, while modernising, the SMP model, but disagreements remained over how far deregulation should go and how responsibilities should be shared between operators and digital platforms.

Closing remarks

Franco Accordino, Head of Unit, Investment in High-Capacity Networks, DG CNECT

Mr Accordino noted that Europe is at a connectivity turning point as National and Regional Partnership Plans take shape, but warned the core challenge is still a supply-demand mismatch. He argued this requires tighter convergence between infrastructure, investment and content, and noted that demand aggregation and vouchers have produced mixed results, so uptake measures must be more tailored. Looking to the next MFF, he commented that Europe has not been creative enough on telecom business models, and urged policy conditions that support competition around AI and data hosting, including bundling connectivity with value-added digital services. He also stressed resilience and security must be built into the infrastructure itself, not only the upper layers, to avoid single points of failure, treating connectivity as critical infrastructure linked to industrial ecosystems and supply chains. Mr Accordino highlighted the need to connect local and rural areas to large-scale European capacities and urged stakeholders to engage in the MFF debate, noting that the European Competitiveness Fund will rely on connectivity even when not explicitly labelled. He closed by underscoring BCOs' growing role in convening actors to turn data and connectivity into value that sustains investment.

Conclusion

The role of public authorities, cross-sector cooperation, and innovative financing mechanisms were identified as key drivers to boost adoption and ensure inclusion across regions. On telecom regulation and market governance, tensions persist between investment incentives and competitive safeguards. Across all sessions, a shared understanding emerged: Europe's digital transition depends on a balanced policy approach that combines investment, competition, and innovation. Achieving this will require renewed cooperation between regulators, industry, and digital actors to deliver sustainable, inclusive, and future-oriented connectivity.



2025 European Digital Connectivity Awards

At the 2025 European Digital Connectivity Awards ceremony, held in Brussels on 7 October, the European Commission gave recognition to European digital connectivity projects that demonstrate replicable good practices in the planning, management and implementation of high-capacity digital networks in Europe and show innovative ways of achieving the Digital Decade objectives.

The competition welcomes all types of projects, irrespective of size, location or technologies, and whether they are run by public or private entities, from municipalities, regions and Member States' administrations, to communities and private actors, such as network and service operators, utilities and other project promoters that are actively involved in building high-capacity infrastructure.

Nine projects were nominated for the 2025 awards, evaluated by a jury of experts:

Elena Galindo Ayuso, Deputy Director General at the Sub-directorate for Telecom Operators and Digital Infrastructures (the Spanish national Broadband Competence Office) at the Spanish Ministry for the Digital Transformation

Fjodor Gütermann, Head of the Department of Telecommunications Policy and ICT Infrastructure (the Austrian national Broadband Competence Office) in the Austrian Ministry of Housing, Arts, Culture, Media and Sport

Michael Schmitz, Deputy Head of Office at the German County Association's EU office, and member of the European Commission's Rural Pact Coordination Group and the Subsidiarity Expert Group of the European Committee of the Regions

The awards were presented by high-level European Commission representatives, **Alexandra Rotileanu**, DG CNECT Deputy Head of Unit for Investment in High-Capacity Networks, and **Hugo Almeida**, DG AGRI Deputy Head of Unit for Rural Areas and Networks, in front of an audience of **over 200 digital connectivity stakeholders from across Europe**, ranging from BCOs, EU representatives and national and regional public authorities, to the full spectrum of telecommunication actors, NGOs and research and education institutions, members of the press and private citizens.

The 2025 edition put the spotlight on nine projects nominated for their excellence under three categories:



Category 1 Excellence and innovation in deployment of gigabit-ready infrastructure

Projects that deliver high-capacity, future-proof networks, including fibre-to-the-home, advanced 5G fixed wireless access / mobile or satellite networks, particularly if in combination with other infrastructures (cloud, edge computing, internet of things, artificial intelligence, 3C networks, etc). The category fosters technological innovation, readiness for current and future demands of connectivity in combination with other digital infrastructures and technologies, promoting new business models for telecom operators.

Winner
Hola 5G Oulu
Finland

Finalists
Rijeka Gateway 5G Campus Network
Croatia

Bibnetz - Sustainable technology in Berlin Public Libraries
Germany

Category 2 Champions in addressing the digital divide in rural and remote areas

Projects that successfully connect rural, remote, or geographically challenging areas, generating socio-economic benefits: digital divide heroes recognised for trailblazing projects that address the digital divide by rolling out networks in the most difficult to reach areas. The category recognises efforts to address one of the most challenging aspects of broadband deployment: ensuring no community is left behind.

Winner
Towards Universal Digital Inclusion: Nationwide Rollout of Very High-Capacity Networks in Rural Areas
Cyprus

Finalists
ERMES – an Excellent Region in a Multimedia European Society
Italy

FTTH gigabit access network deployment in ultra-rural areas in Castilla y León
Spain

Category 3 Cross-border and international connectivity

Projects that are rolling out digital connectivity networks in cross-border regions or multi-country contexts both within the EU or interlinking the EU with other non-EU countries or world regions. Global or regional cross-border gateways, terrestrial or submarine backbone connectivity, fixed or wireless connectivity. The category values efforts of engaging in complex transnational projects as well as delivering holistic, secure and resilience cross border connectivity solutions.

Winner
East West Gate
Czechia, Germany, Poland, Ukraine

Finalists
GN4 Phase 3 Network Project - restructuring of the GÉANT backbone network
Netherlands

ViaTunisia – Submarine cable between Marseille and Bizerte
France and Tunisia



Outreach

A key aspect of the BCO Network's annual activities is connecting with wider stakeholders across the EU to build greater mutual awareness and collaboration towards shared goals. In 2025-26, we were pleased to work closely with our sister networks, the EU CAP Network and Rural Pact Community, and their stakeholders.

The Rural Pact: from vision to action on last-mile connectivity in rural Europe

The BCO Network Support Facility (BCO-SF) was invited by the Rural Pact Support Office to animate a discussion group at the **Rural Pact Conference** 'From vision to action: empowering rural areas for the future', held near Courtrai, Belgium, on 16–17 September 2025. Bringing together over 250 rural stakeholders from across Europe, the conference aimed to inform and help shape the next iteration of the European Commission's EU Rural Action Plan, making it a timely opportunity to connect broadband deployment expertise with the needs and ambitions of rural communities.

Under the theme 'Driving rural society to the digital era', the BCO-SF facilitated the discussion group '**How to overcome the last mile in digital infrastructure?**'. We explored the practical barriers still slowing deployment, namely high costs in sparsely populated areas and permitting rules often designed with urban realities in mind, and participants called for a shift in approach to close the digital divide at scale. A strong message emerged: high-speed, secure and reliable connectivity

should be treated as an essential utility, with public authorities empowered and equipped to ensure access across the territory.

The discussion generated concrete, forward-looking recommendations to feed into the next EU Rural Action Plan, including adapting regulation and permitting to rural contexts, introducing last-mile grants, and addressing the risk that the remaining 5G spectrum auctions could leave rural and remote territories behind. The BCO-SF captured and consolidated these inputs with the organisers and rapporteur, and several points resonated beyond the group, being reflected in the plenary and echoed in later policy discussions.

Beyond the session itself, the conference enabled valuable exchanges with rural development actors, European Commission colleagues and sister networks, strengthening mutual understanding and reinforcing the BCO Network's role as a bridge between policy, funding and on-the-ground deployment realities in rural and remote areas.

EU CAP Network synergies: boosting rural connectivity and precision farming collaboration

In 2025–26, the BCO Network Support Facility strengthened collaboration with the EU CAP Network and DG AGRI through two complementary engagements that helped widen the visibility of the BCO Network among rural development and innovation stakeholders, while advancing work on precision farming connectivity needs.

First, at the **EU CAP Network Assembly** (4th meeting) in Brussels on 4 December 2025, the BCO-SF presented the BCO Network, highlighting its role in supporting broadband deployment in rural and remote areas. The

intervention also promoted two forthcoming initiatives of direct relevance to the CAP community: the open online session 'Bridging the digital divide: two success stories of broadband deployment in rural areas' and a new study on connectivity requirements for precision farming (described on page 25 of this report). The presentation generated strong interest, including follow-up exchanges and a noticeable rise in registrations for the online session. The presence of BCO Network members, such as BCO Finland who publicly endorsed the presentation, also helped reinforce the Network's added value and visibility.

Building on this momentum, the BCO-SF participated in the EU CAP Network workshop '**Sensing the future: practical applications of proximal and remote sensing for farmers and advisors**' in Valencia on 27–28 February 2026. In a setting focused on practical adoption of sensing technologies, the BCO-SF again showcased the BCO Network's contribution to knowledge exchange and capacity building for equitable rural connectivity. The workshop provided a timely platform to introduce the precision farming connectivity study in more depth and to launch its survey, gathering direct input from farmers and advisors to ensure the study reflects real-world needs and informs connectivity solutions that enable tools such as sensors, connected machinery, robotics and drones.

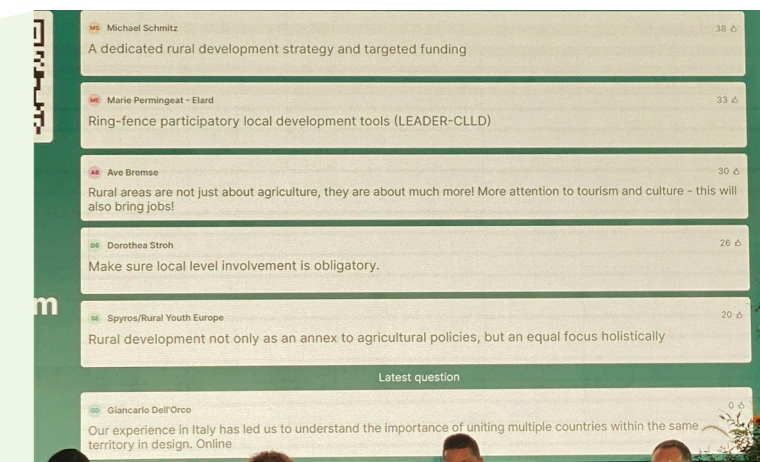
Together, these two engagements demonstrate the value of structured cross-network exchange: they connected the BCO Network with stakeholders affected by rural connectivity challenges, strengthened dissemination channels through the EU CAP Network, and supported tangible follow-up actions linked to key BCO-SF activities.

The 2025 Agricultural and Rural Inspiration Awards (ARIA): digital in support of rural - discovering good practices

At the 2025 [ARIA ceremony](#) in Brussels in

September 2025, we had the opportunity to meet with many excellent projects demonstrating good practices in rural development and agricultural innovation. As part of our work to raise awareness of what can be achieved when rural communities can make the most of digital technologies and services, we filmed interviews with three inspiring projects which we look forward to sharing in the coming months:

- ['Bodenkoffer'](#): an Austrian project that developed a kit - including an app - to analyse soil quality, making farmers' work easier and helping to reduce expenditure on fertilisers and pesticides
- [Digital farm succession for gender-equal entrepreneurship](#): a Swedish project promoting more sustainable farm successions for all parties through knowledge sharing
- [Dimitra - the way forward for Lucanian farms](#): an Italian project proving that agriculture can be technological, sustainable and profitable, even for younger generations.



Study to develop a methodology for the measurement of quality of service of 5G connectivity

In 2025-26, the Support Facility continued its study to develop a methodology to assess the quality of service provided through 5G connectivity. In the current Digital Decade reporting and most national reports, 5G coverage is assessed based on availability rather than service quality. As a result, there is uncertainty in the reported data regarding where Standalone 5G is truly available and where it is not.

In light of the evolving Digital Decade reporting and of possible State aid needs when assessing any 'step changes' in 5G deployment, the development of a common methodology was requested by the Commission, and this study's first phase was launched in 2024. The resulting methodology was developed in consultation with stakeholders, and the second phase involves small-scale field trials by four Member States to allow testing and fine-tuning the methodology, so that larger trials can take place in view of a future adoption into the Digital Decade process.

In the summer of 2025, a public consultation was launched which attracted a significant number of responses. These highlighted a general consensus on most aspects of the methodology, with some detailed and valuable insights into some technical aspects to be fine-tuned.

This feedback will be taken on board by the Commission in the process of planning the new Digital Decade indicators.

Investing in Europe's subsea digital lifelines: why continued public support remains essential

The Support Facility delivered a study to assess the EU's future public funding needs for subsea digital connectivity, recognising the vital role subsea telecoms cables play in Europe's economic security, growth, strategic autonomy and global presence. Designed as a high-level internal discussion paper for the European Commission, it evaluates whether a successor to the current Connecting Europe Facility (CEF) support for subsea cables is warranted, and maps key investment needs, systemic fragilities and connectivity gaps, drawing on literature review, expert interviews and illustrative scenarios. While focused on subsea telecoms (excluding power cables and satellites as alternatives), it also acknowledges the interdependence with terrestrial backbone networks where relevant.

The study concludes that continued public funding is necessary. Although the global subsea cable market delivers high-quality connectivity overall, it is increasingly shaped by non-European investment, with a declining presence of European operators and investors despite sector growth. Over time, this risks eroding Europe's industrial base (skills, capability, suppliers and financing) and creating strategic dependencies on third-country providers to finance, build and maintain critical infrastructure. The analysis also highlights persistent gaps that the market is unlikely to address without incentives, such as resilient redundant links, connectivity for remote or commercially unattractive territories, and maintenance and repair capabilities in conflict-affected areas.

Building on the EU's work to identify Cable Projects of European Interest (CPEIs) to better target interventions, the study recommends maintaining flexibility by reserving part of future funding for evolving needs beyond today's priority list. It also suggests that future support may need to go further than infrastructure builds alone, proposing a more integrated approach that strengthens the

wider subsea ecosystem, such as maintenance capacity, planning and permitting facilitation, skills, demand alignment by European anchor customers, and continued research and innovation, alongside continued cable deployment where it delivers clear resilience and geopolitical benefits.

Taking stock of achievements and enhancing impact: strengthening the BCO Network for the next phase of Europe's connectivity goals

In 2025, the Support Facility concluded its study assessing the BCO Support Facility's capacity to deliver on its overarching objective: supporting Broadband Competence Offices (BCOs) in Member States to enable effective policy action and investment for achieving EU digital connectivity targets. Set against the EU's progressive connectivity framework, from the Digital Agenda and Gigabit Society objectives to the Digital Decade 2030 targets, the study reviews how the BCO Support Facility has contributed to strengthening national and regional broadband ecosystems over its first eight years.

The study concludes that the BCO Support Facility has delivered all planned outputs to the required quality, and that it functions as more than a coordination mechanism: it is a strategic enabler that builds maturity in broadband projects, supports evidence-based policymaking, and reinforces Member States' capacity to absorb EU funding. It finds that BCO-SF activities have helped clarify and consolidate BCO roles across countries, making many BCOs operational and better equipped to engage public authorities, investors and operators, while also strengthening interactions with regions and local stakeholders. The analysis also highlights benefits for the European Commission, notably through improved insight into national implementation challenges and feedback that can help shape policy measures closer to market realities.

Looking ahead, the study recommends leveraging the BCO Network's achievements by evolving its support offer to match fast-changing technology, market and policy developments, while paying particular attention to less-connected regions and strengthening cooperation with complementary networks (such as rural and macro-regional networks). It proposes structuring the BCO Network's future work around three objectives:

1. tackling unresolved digital infrastructure challenges (including 5G quality of service and emerging technologies)

2. gradually preparing the ground for the Connected Collaborative Computing (3C) agenda
3. supporting measures that drive the uptake and effective use of networks.

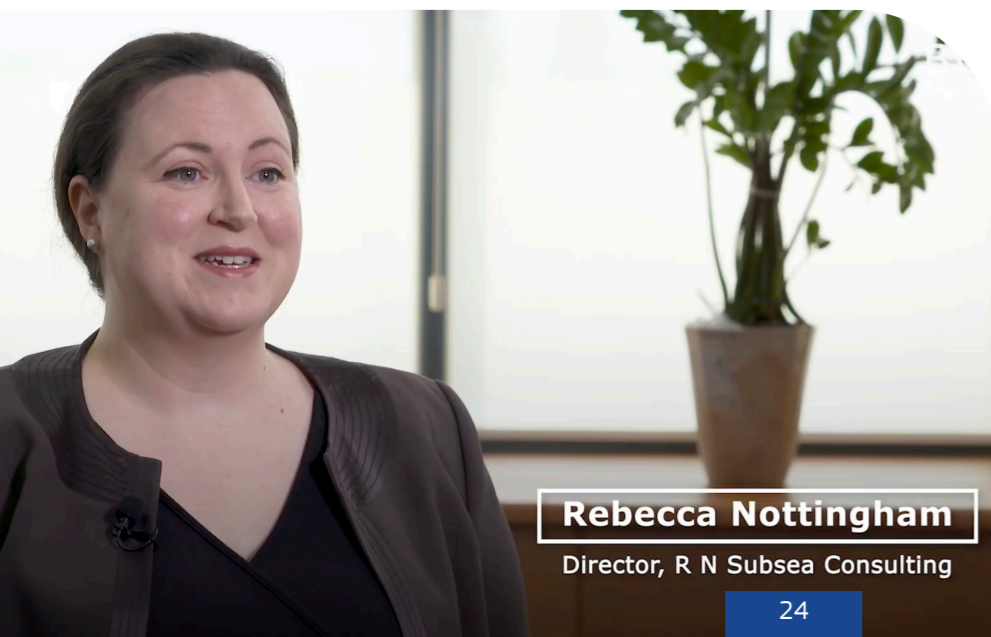
Across these priorities, the study underlines the importance of reinforcing recognition of BCOs and ensuring they have the capacity to act as trusted reference points for policy, technical and regulatory guidance, and the development of connectivity projects across funding instruments.

Mapping connectivity needs for precision farming: a new study at the intersection of agriculture and digital infrastructure

In 2026, the Support Facility launched a new study working with the Universitat Politècnica de Catalunya to assess how rapidly evolving precision farming practices are shaping connectivity needs in rural areas. As drones, sensors and increasingly connected machinery become more common in crop production and livestock management, the study will examine how these technologies are being designed and deployed, and, crucially, what connectivity assumptions equipment manufacturers are using when developing new solutions.

The study has two main objectives: first, to identify key trends in connected precision farming; and second, to understand the connectivity baselines that underpin product and service design decisions. A central question is whether satellite connectivity alone can meet the expected requirements of precision farming, or whether 5G, or hybrid approaches such as satellite backhaul for 5G antennas, would deliver significant added value. The study will also explore the relative suitability of different satellite approaches, including geostationary versus low Earth orbit (LEO) connectivity, in terms of performance and potential step changes for the sector.

To ground the analysis in real-world perspectives, the study will be based on a series of targeted interviews with key stakeholder groups, including national farmers' associations, equipment manufacturers and their associations, academic and research experts, and telecom and satellite operators. Particular attention will be paid to how different connectivity providers position themselves, whether as competitors or "coopetitors", and what this means for practical deployment models in rural and remote areas.



Rebecca Nottingham
Director, R N Subsea Consulting

Publications

Underpinning the training and capacity-building events are a series of publications dedicated to promoting awareness of:

- good practices in broadband project planning, financing and implementation
- EU support for broadband through a range of funds and targeted instruments

This year's publications highlights were:

The [Connecting Europe Facility Digital programme](#) brochures, presenting the projects funded under CEF Digital calls 1-3 for:

- *Backbone connectivity for Digital Global Gateways*
- *5G (and Edge Cloud) for Smart Communities*
- *5G coverage along transport Corridors*

These projects accelerate Europe's digital transformation, deploying safe, secure, and sustainable high-performance infrastructure across the EU, with a focus on gigabit and 5G networks.



The 2025 European Digital Connectivity Awards brochure showcasing nine projects from across Europe that demonstrate excellence and replicable good practices in planning, management and implementation of high-capacity digital networks, under three specific categories:

1. *Excellence and innovation in deployment of gigabit-ready infrastructure*
2. *Champions in addressing the digital divide in rural and remote areas*
3. *Cross-border and international connectivity*



Scan or click on this QR code to view the BCO Network Library



SCAN ME

Videos



The BCO Network's video interview series is comprised of interviews with broadband project promoters across Europe, ranging from BCOs and national and regional authorities to rural cooperatives and private companies, as well as European Commission representatives and experts.

It combines:

- an exploration of good practices in broadband project planning, financing, and use of technology, among others
- a look at challenges and the different ways that projects overcame them
- introductory overviews of EU broadband-related policy, such as regional development and territorial cohesion, and funding avenues, such as the Connecting Europe Facility, the European Agricultural Fund for Rural Development and the European Regional Development Fund
- thematic videos on connected topics such as environmental monitoring by satellite, precision agriculture and Smart Villages
- BCO showcases, exploring different set-ups, services and mandates, and how different BCOs, at both national and regional level, fulfil them





info@broadbandeurope.eu
 0032 (0) 22820918
www.bconetwork.eu
[@connectivityEU](https://twitter.com/connectivityEU)

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