



Belgian Institute
for postal services
and telecommunications

ANNUAL REPORT 2024

ELECTRONIC COMMUNICATIONS | POSTAL SERVICES | SPECTRUM MANAGEMENT | MEDIA IN BRUSSELS | NETWORK SECURITY | ONLINE PLATFORMS

ANNUAL REPORT

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Foreword

2024 was a pivotal year for the BIPT. It began with a new Council, composed of Michel Van Bellinghen, Chairman of the Council, and Bernardo Herman, Peggy Valcke and Stefaan Vyverman, Members of the Council. This reappointed Council laid the foundations for its tactical vision by publishing on 29 May 2024 its Strategic Plan for the 2024-2026 period. It is based on a clear ambition: to foster a reliable, sustainable and competitive digital environment for everyone. Building on the previous strategic plans, the 2024-2026 plan reaffirms its commitment to ensuring that the markets under its supervision develop in a competitive manner that encourages efficient investment. It also reinforces the attention paid to users, security and resilience of the digital infrastructures, as well as the need to intensify the control actions that are carried out. It also highlights the importance of sustainability and of contributing to the reduction of the environmental footprint. Furthermore, the plan stresses the growing importance of cooperation with other authorities involved in the control of digital technologies, while respecting each authority's competences and responsibilities.

One of the major evolutions in 2024 is the extension of the BIPT's competences within the

framework of the implementation of the new European digital regulation. Designated as the competent authority for the implementation of the European Digital Services Act (DSA) alongside other Community regulators, the BIPT has also been designated as Digital Services Coordinator (DSC). Therefore, it ensures the national coordination of the supervision by the various competent authorities of compliance with the DSA, which entered into force on 17 February 2024. This new competence is in addition to the BIPT's previous designation as competent authority in the digital sector, among others for the settlement of disputes between press publishers and information society service providers, and for the implementation of the Terrorist Content Online Act. In this context, the BIPT is also preparing to assume the responsibilities entrusted to it within the framework of the implementation of the Gigabit Infrastructure Act, the Data Act, the Artificial Intelligence Act or the e-Evidence Directive. The BIPT also monitors all developments in the digital sector to anticipate future challenges.

At the same time, the European regulatory framework for electronic communications is itself undergoing fundamental change, driven by several major forward-looking documents

published in 2024: the European Commission White Paper "How to master Europe's digital infrastructure needs?", the Draghi Report on European competitiveness and the Letta Report on the Single market. These texts herald an in-depth reform of the current regulatory framework and, consequently, of the Regulation itself. The BIPT has actively contributed to the discussions on this subject within BEREC, where it is represented in the twelve working groups and governance bodies.

At the Belgian level, the BIPT has, of course, continued its missions in the field of electronic communications, where, in response to an ever-increasing demand for data, operators are continuing to deploy very high capacity fixed networks (VHCN) and 5G. Within the framework of the deployment of fibre networks, infrastructure competition is not economically profitable everywhere and there are also likely to remain areas where fibre deployment will remain unprofitable even in the case of cooperation. Operators can be expected to consider cooperating in certain areas (maintaining competition for services on a common infrastructure). The BIPT took the initiative to clarify the conditions that should be met by such collaborations in order to guarantee effective



Bernardo Herman
Member of the Council




Peggy Valcke
Member of the Council




Stefaan Vyverman
Member of the Council




Michel Van Bellinghen
Chairman of the Council



Foreword

and sustainable competition for the benefit of end users. A first memorandum of understanding to this effect was submitted in July 2024. It is the subject of an investigation opened by the Belgian Competition Authority, with which the BIPT works closely to assess its implications for the competitive landscape and to ensure its compliance with competition rules.

Another significant development in the electronic communications market was the launch on 11 December 2024 of a mobile offer at national level and its fixed internet offer in parts of Brussels territory by the 4th mobile operator, DIGI. Although this arrival took place at the end of the year, consequences on the retail prices could be immediately observed on the mobile market.

On the postal market, 2024 was primarily marked by the entry into force of the Parcel Act, which aims to improve the working conditions of parcel deliverers and to establish sustainable competition in the parcel delivery sector. The BIPT actively collaborated in its implementation, notably via the development, launch and subsequent management of the [BELparcel](#) platform. The purpose of this platform is to centralise information and facilitate the



monitoring of legal obligations regarding working conditions in the parcel delivery sector. However, the BIPT questions the effectiveness and efficiency of the Parcel Act. An in-depth evaluation should help identify the real impact of this Act on the working conditions of parcel deliverers. The BIPT also continued its data collection work on the postal market and published a new study on the postal aspects of e-commerce, with a particular focus on the sustainability of the “last mile delivery”.

For the BIPT, the end of 2024 was also marked by the move of its teams working in the headquarters in Brussels to new premises, corresponding to current energy and environmental standards. This change of work environment has been carefully planned to provide visitors with a quality welcome for work meetings, conferences or exams. Of course, it also provides all staff members with a modernised, highly functional work environment perfectly adapted to current needs and uses, promoting exchanges, collaboration and well-being at work.

This annual report describes the achievements of the BIPT’s missions during the year 2024, based on the five new strategic axes: Competition

and market development, user interest, security of digital infrastructures, control and support, and efficient operation. The Council welcomes the work accomplished and sincerely thanks all employees for their work and their commitment to ensuring “A reliable, sustainable and competitive digital environment for everyone”.

2024 was a pivotal year for the BIPT, with the arrival in office of a new Council and adoption of the 2024-2026 Strategic Plan.

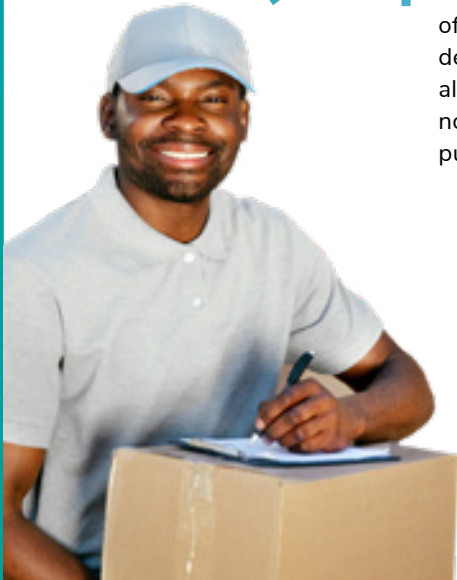
2024: key figures

1781



1781

At the end of 2024, a total of 1 781 last-mile parcel delivery companies had already submitted their notifications on BELparcel, pursuant to the Parcel Act.



7

7th



“Supervising the application of digital regulations” has become the 7th objective of the BIPT’s Strategic Plan 2024-2026. This objective is related to the competences that the BIPT has been assigned with within the framework of the numerous legislative developments concerning the digital sector.

95%



95%

95% of the Belgian territory is covered by fixed networks with a speed of 1 Gbps (VHCN), which is well above the European average of 79%.

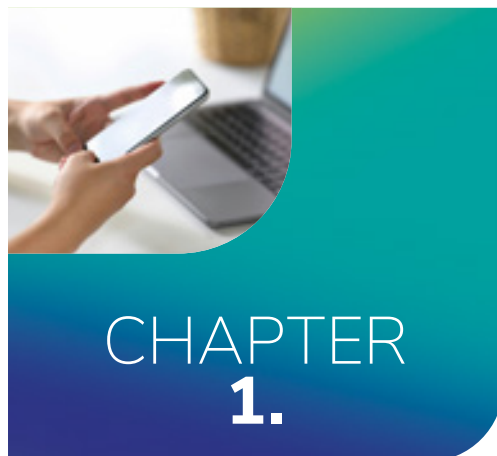
120 750



120 750

In cooperation with the customs authorities, the BIPT checks radio equipment at border entry points. As a result, 120 750 non-compliant devices were blocked by the BIPT in 2024.

The annual report at a glance

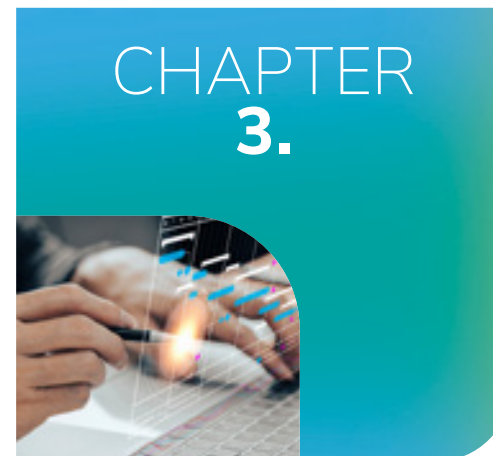
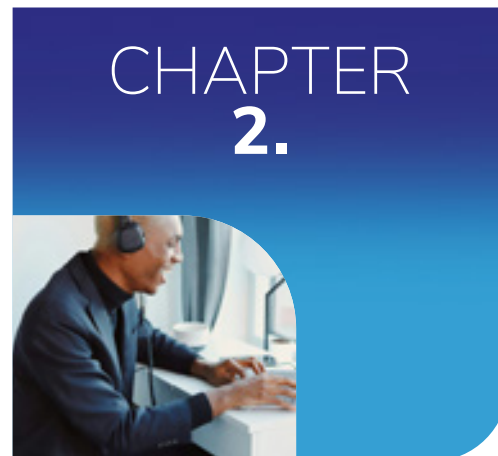


THE BIPT

With the arrival in office of a new Council in early 2024, a new Strategic Plan for the years 2024-2026 was published on 29 May 2024. It is based on a clear ambition: to foster a reliable, sustainable and competitive digital environment for everyone. The BIPT exercises its power at Belgian and international level.

Realisation of our strategic objectives in 2024

The implementation of the BIPT's strategic objectives is based on five strategic axes: competition and market development, user interest, digital infrastructure security, control and support, and efficient operation. Chapter 2 presents how these strategic axes were translated into action via the 2024 Operational Plan and the day-to-day operation of the BIPT.



2024 in numbers

Chapter 3 describes the main trends observed by the BIPT on the electronic communications, postal service and media markets. The BIPT closely monitors developments in the regulated markets and publishes detailed information via the postal observatory and its communications on the situation on the electronic communications and television market.

Additional information

In addition to a financial report and annual accounts of the universal service funds, the annual report must include an overview of the infringement proceedings initiated. You will find this and other relevant information, such as the BIPT's organic framework in the annex. You will also find extra information about the BIPT's activities in 2024.





Belgian Institute
for postal services
and telecommunications

CHAPTER 1. THE BIPT



1. Our role

The Belgian Institute for Postal Services and Telecommunications (BIPT) is the federal regulator of the postal and telecommunications sectors. It is also responsible for ensuring digital infrastructure and online platforms security. Nobody knows these markets better than the BIPT. The BIPT protects the users of these sectors. It ensures that provided services are reliable and of good quality. That is why the BIPT monitors compliance with legal obligations, the developments on the market, the use of radio spectrum, numbers and equipment. The BIPT is also responsible for certain media services in the Brussels-Capital Region. The BIPT works with the national and European authorities concerned and maintains dialogue with the various stakeholders, while adopting, if necessary, strict but lawful sanctions, with the aim to create a competitive, efficient and innovative market in which the rights and interests of users are adequately protected.

1.1. Our objectives

In its various fields of competence (electronic communications market, postal market, electromagnetic spectrum of radio frequencies and network security), the BIPT must accomplish a series of objectives which mainly stem directly

from the European and Belgian regulatory frameworks.

To achieve them, the BIPT draws up a strategic plan every three years. This plan determines the strategic axes and priority fields of activity of the Institute. It also contributes to the good administration of the BIPT. The plan is the result of the BIPT's expertise and responds to the developments within its environment. It also ensures democratic control over the functioning of the BIPT.

With the arrival in office of a new Council in early 2024, a new [Strategic Plan for the years 2024 to 2026](#) was published on 29 May 2024.

Vision. A vision enables an organisation to define what it upholds. Succinct but incisive, the vision of the BIPT reflects what it aspires to and clearly presents to its employees and stakeholders the ambition that drives it.

“A RELIABLE, SUSTAINABLE AND COMPETITIVE DIGITAL ENVIRONMENT FOR EVERYONE.”

Close to that set out in the previous strategic plan (“a reliable and competitive communications

environment for all”), this vision is differentiated by two adaptations:

- The “digital” environment becomes the field of work. This development finds its origin in:
 - The extension of the competences vested in the BIPT following the adoption, within the European regulatory framework, among others of the DSA (Digital Services Act).
 - The changes in the postal sector from mail delivery to the provision of digital postal services and parcel delivery within the framework of e-commerce.
- “Sustainability”, already present in a diffuse way in the previous Strategic Plan, becomes an explicit dimension of the Institute’s vision.

Mission. The mission of the BIPT is defined in Article 5 of the Act of 13 June 2005 on electronic communications: “Within the framework of its competences, the Institute shall take all reasonable, necessary and proportionate measures to fulfil the objectives set by Article 6. It shall act impartially, objectively and transparently and in a non-discriminatory and proportionate manner.” To accomplish its mission in its primary area of work, the digital environment in the broad sense, the BIPT

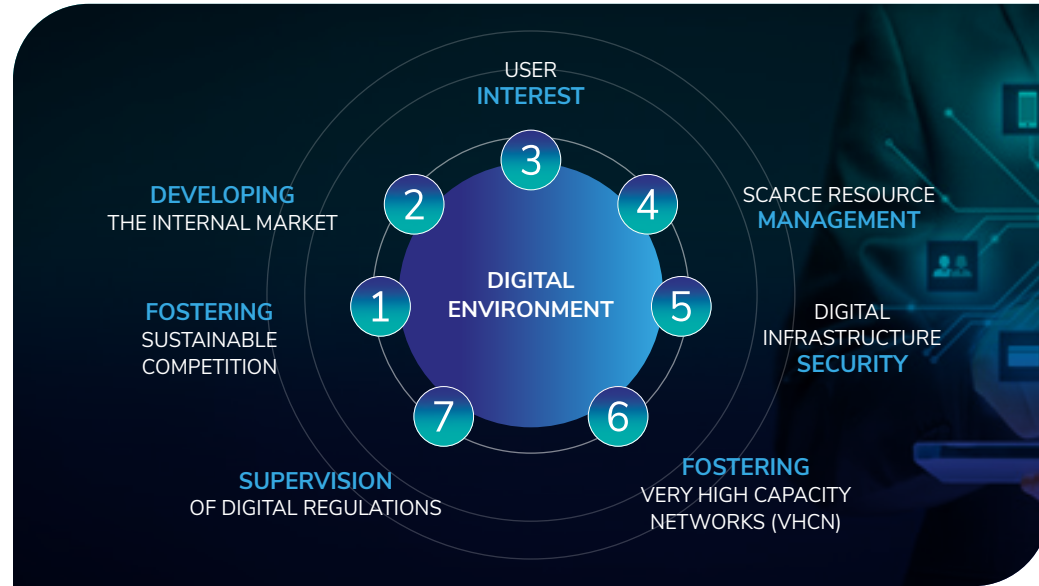
pursues 7 objectives:

- fostering healthy and sustainable competition, and ensuring access to the market;
- contributing to the development of a domestic market of efficient networks and services;
- protecting the users’ interests while taking account of social inclusion, a high level of protection, clear information and transparency;
- managing scarce resources such as radio frequencies and numbering resources;
- ensuring the security of the digital infrastructure;
- promoting connectivity and access to, and take-up of, Very High Capacity Networks (VHCNs), including fixed, mobile and wireless networks;
- supervising the application of digital regulations.

Values. The BIPT fulfils its duties in accordance with the following values:

- **independence:** the BIPT adopts an objective, neutral and consistent attitude, without conflicts of interest, prejudice or improper influencing. The BIPT collaborates with the competent ministers, the Federal Parliament, the companies in the sectors regulated by the Institute, and other public bodies and stakeholders. These contacts are beneficial and often necessary to ensure a functioning

1. Our role



that is attuned to the developments in society and the regulated markets, on the one hand, and stable and predictable, on the other hand. However, the BIPT must therefore make sure to defend and preserve its independence. From that perspective, its specific status and its financial autonomy are the best guarantees;

- **reliability:** as a centre of expertise, the BIPT wishes, when adopting a position, to be a reliable and competent partner for all

stakeholders. This reliability is supported internally by the professionalism, teamwork and agility of the BIPT;

- **transparency:** this is part of the monitoring of the BIPT’s intervention. It is achieved via openness and visibility, both internally and externally, on the one hand, and dialogue and accessibility, on the other hand. Decisions are thus well motivated and often subject to prior consultation.

1.2. Our competences

The BIPT has several duties. It is thus:

- **the regulator of the electronic communications market:** it carries out the tasks laid down by law and monitors compliance with the legislation on electronic communications;
- **the regulator of the postal market:** it carries out the tasks laid down by law and monitors compliance with the legislation on postal services;
- **the manager of the electromagnetic radio frequency spectrum:** the BIPT is responsible for the radio frequency spectrum and numbering space to ensure that they are used as efficiently as possible. It also fulfils the role of “police of the radio waves” to put a stop to any form of harmful interference;
- **the regulator of audiovisual media and video-sharing platform services in the bilingual Brussels-Capital Region, provided that the activities of the broadcasting company cannot be specifically related to the French Community or the Flemish Community:** the BIPT ensures that operators comply with the specific regulation on radio and television broadcasting.

The BIPT is also a member of the “Conférence des régulateurs des médias et des télécommunications” (Conference of telecommunications and media regulators or CRC) which includes the CSA (“Conseil supérieur de l’Audiovisuel”), the Medienrat and the VRM (“Vlaamse Regulator voor de Media”) as well. Each draft decision of the BIPT on electronic communications networks is submitted to the other three authorities.¹

The BIPT has been designated as the reference authority for the implementation of various European regulations in its fields of competence:

- the BIPT has been designated as **the sectoral authority for the electronic communications sector by the Act of 1 July 2011 on the security and protection of critical infrastructures.** This act transposes the Council Directive of 8 December 2008 on the identification and designation of European critical infrastructures and the assessment of the need to improve their protection. The role of the BIPT in this context will probably be extended in the future act transposing the new Directive 2022/2557 of 14 December 2022 on the resilience of critical entities, adopted at the end of 2022 and replacing the Directive of 8 December 2008.

1. Cooperation Agreement of 17 November 2006 between the Federal State, the Flemish Community, the French Community and the German-speaking Community on the mutual consultation when the regulatory authorities in charge of telecommunications or radio and television broadcasting draw up legislation regarding electronic communications networks, exchange information and exercise powers regarding electronic communications networks.

1. Our role

- the BIPT is **the market surveillance authority for radio products subject to the RED (Radio Equipment Directive)** of 16 April 2014, including smartphones, mobile radio transceivers, etc. The Institute is responsible, on the one hand, for verifying the conformity of equipment marketed in Belgium or imported into the European Union via Belgium, and, on the other hand, for taking appropriate measures in case of risk to consumer safety;
- the Act of 26 April 2024 laying down a framework for the cybersecurity of networks and information systems of general interest for public safety, which constitutes the Belgian transposition of the “**NIS2 Directive**” and which replaces the previous Act of 7 April 2019, designated the BIPT as **sectoral authority and sectoral inspection service** for the digital infrastructure sector, with the exception of trust service providers within the meaning of Article 8, 24°, of this Act, and for the postal and shipping services sector².

The BIPT is also intensely involved in the transposition or implementation of the new European digital regulation. It is preparing to assume responsibility for any new monitoring and advisory tasks that may be assigned to it in this field. At this stage, the BIPT has already



been designated as the competent authority for certain matters relating to the digital sector:

- the Act of 19 June 2022 transposing the European directive on copyright and related rights in the Digital Single Market³ entrusted the BIPT with the competence **to settle disputes between press publishers and information society service providers**. Therefore, the BIPT may determine the remuneration due to a publisher, provided that the parties have at least previously attempted to reach an agreement in good faith and have negotiated to this end for a minimum period of four months. However, there is uncertainty about the future of the BIPT’s competence in this matter following pending constitutional appeals that call into question its validity and scope.
- in December 2023, the BIPT was designated as **the competent Belgian authority for the implementation of the Terrorist Content Online Act**, together with the Federal prosecutor’s office. Regulation (EU)2021/784 aims to combat the misuse of hosting services for the dissemination of terrorist content online. It has been directly applicable in all Member States since 7 June 2022. The act entrusting this new mission to the BIPT came

2. The BIPT’s competence in the digital infrastructure sector therefore includes the following subsectors: Internet Exchange Point providers, DNS service providers, excluding operators of root name servers, top-level domain name registries, cloud computing service providers, data centre service providers, content delivery network providers, provider of public electronic communications networks and providers of publicly available electronic communications services.

1. Our role



into force at the end of December 2023. The federal prosecutor's office is responsible for issuing orders for the removal of content and, if necessary, carrying out a thorough examination of cross-border removal orders (from order issuing authorities of other

Member States). For its part, the BIPT is responsible for monitoring the specific measures to be implemented by hosting service providers and for sanctioning non-compliance with the obligations imposed on them by the Regulation (including the

obligation to remove terrorist content or to disable access to such content in all Member States following receipt of a removal order).

- in 2024, the BIPT was designated as **the competent authority at federal level, under the European Digital Services Act** (Digital Services Act or DSA)⁴, alongside the Vlaamse Regulator voor de Media (VRM), the Conseil Supérieur de l'Audiovisuel (CSA), and the Medienrat. Depending on their respective remits, the competent authorities (the BIPT, the VRM, the CSA and the Medienrat) are responsible for the effective implementation of the DSA and for ensuring compliance with it by providers established in Belgium or who have appointed their legal representative there. Each competent authority deals with the substance of cases falling within its competence, taking into account the Belgian division of competences. In practical terms, each regulatory authority will take care of the prosecution of infringements in the territories and matters for which it is responsible.

Furthermore, on 20 December 2024, the Federal State gave its consent to the cooperation agreement organising the implementation of the DSA by the various Belgian competent authorities. This cooperation agreement also

designates the BIPT as **Digital Services Coordinator (DSC)**. In taking on this role, the BIPT is responsible for coordinating, at national level, the monitoring by the various competent authorities responsible for the compliance with the DSA.

The DSA imposes transparency and due diligence obligations on providers of intermediary services so that users can use their services without being exposed to illegal content and while protecting their fundamental rights. The DSA is directly applicable under Belgian law since its entry into force on 17 February 2024.

Means of action. In performing its duties, the BIPT may:

- open investigations (following a complaint or on its own initiative) and carry out inspections;
- take administrative decisions and impose administrative sanctions;
- issue opinions on its own initiative or at the request of the competent ministers or the Chamber of Representatives;
- conduct studies, gather all useful information or organise a public consultation;
- act as a conciliator in case of disputes.

3. Act of 19 June 2022 transposing Directive (UE) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC.

4. Act of 21 April 2024 implementing Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market For Digital Services and amending Directive 2000/31/EC, amending Book XII and Book XV of the Code of Economic Law and amending the Act of 17 January 2003 on the status of the regulator of the postal and telecommunications sectors.

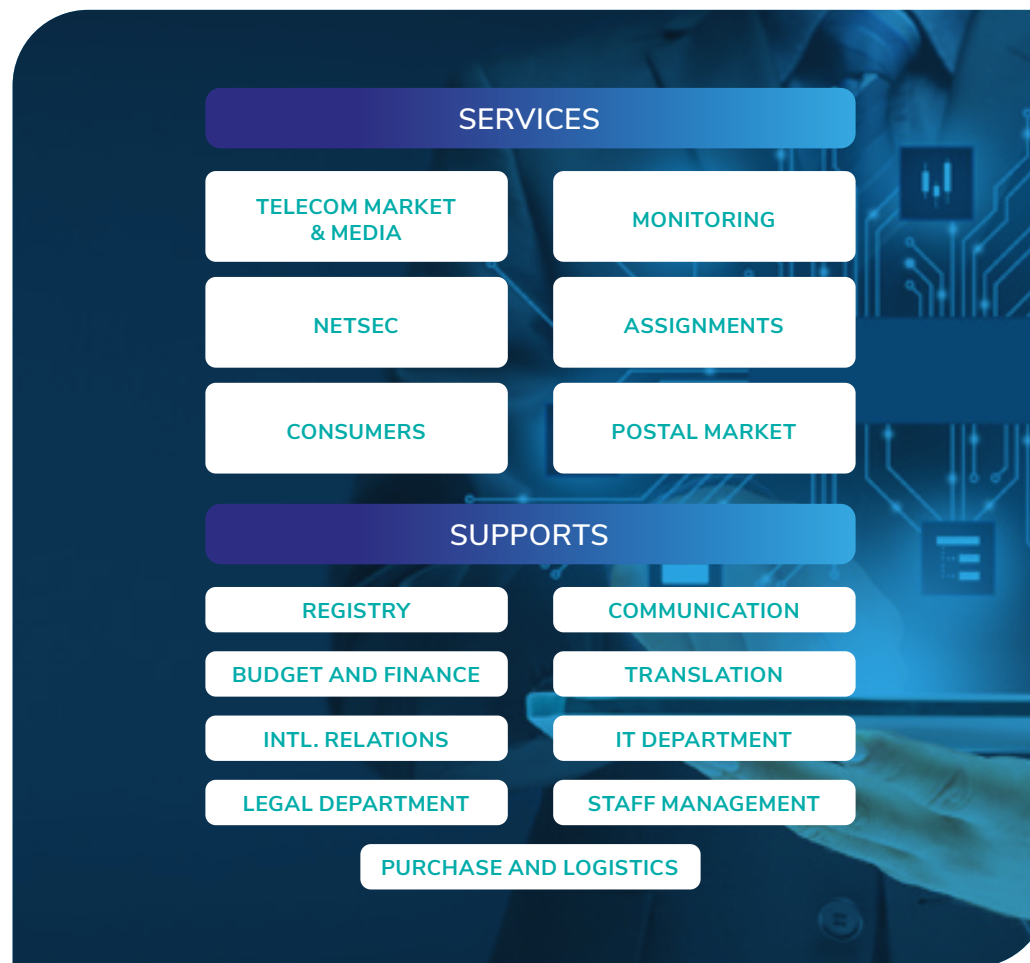
2. Our organisation

2.1. Our status

The BIPT, an independent institution of public interest with its own legal personality since the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors, benefits from autonomous financial management and is financed by the contributions from the players of the regulated sectors.

The democratic monitoring of the BIPT's operation is, however, ensured and is exercised through the following instruments:

- Every three years, a Strategic Plan is drawn up and presented to the Chamber of Representatives. It is the backbone of the successive operational plans, the implementation of which is also presented annually to the House of Representatives;
- Each year, the BIPT publishes a report on its activities and the developments in the postal service and telecommunications markets for the stakeholders;
- The Institute's draft budget and its accounts are approved by the Ministers of Budget and Finance. The draft budget is published and the budget is also submitted to the Chamber of Representatives. The annual accounts are audited by the Belgian Court of Auditors;



- The decisions of the BIPT may be the subject of full remedy actions brought before the Market Court whose decision shall be in the form of an interim order. The Court may suspend the BIPT's decisions and annul them with retroactive effect.

2.2. Our structure

The BIPT is run by the Council, made up of a chairman and three members; the four of them are appointed by the King for a period of six years. A new Council took up office on 2 January 2024, composed of Michel Van Bellinghen, Chairman of the Council, and Bernardo Herman, Peggy Valcke and Stefaan Vyverman, Members of the Council.

The BIPT's organisational chart contains nine horizontal departments (the Registry, the Communications Department, the Budget and Finance Department, the Translation Department, the International Relations Department, the IT Department, the Legal Department, the Personnel Management Department and the Purchasing and Logistics Department).

3. Our interventions

3.1. Our expertise

Based on its experience and its contacts with the telecommunications and postal markets, the BIPT is regularly asked to contribute to the preparation of strategic documents or decisions in these sectors. Examples of interventions in 2024 are detailed below.

3.1.1. Preparation of the electronic communications sector regulation⁵

Common chargers. The BIPT participated in the work on the transposition of Directive (EU) 2022/2380 of the European Parliament and of the Council of 23 November 2022 amending Directive 2014/53/EU on the harmonisation of the laws of the Member States relating to the making available on the market of radio equipment, the objective of which is to enable radio equipment to be charged by wired charging in a harmonised manner via common chargers. Requirements have been introduced to ensure that consumers and other end users are not obliged to purchase a new charging device with each purchase of a new mobile phone or similar radio equipment. The aim is to ensure consumer comfort, reduce e-waste and avoid fragmentation

of the charging device market. The transposition was carried out, on the one hand, by the Act of 6 February 2024 amending the Act of 13 June 2005 on electronic communications with a view to partially transposing Directive (EU) 2022/2380 of the European Parliament and of the Council of 23 November 2022 amending Directive 2014/53/EU on the harmonisation of the laws of the Member States relating to the making available on the market of radio equipment (Belgian Official Gazette of 13.07.2024) and, on the other hand, by the Royal Decree of 13 March 2024 amending the Royal Decree of 25 March 2016 on the making available on the market of radio equipment (Belgian Official Gazette of 02.04.2024, erratum Belgian Official Gazette of 02.07.2024).

Customer response deadlines. On 8 February 2024, the BIPT also issued an [opinion](#) on a preliminary draft Royal Decree determining the deadlines for answering certain written questions and complaints from end users. The BIPT issued a positive opinion on some of the provisions, but considered for other provisions that the King should not reduce the deadlines agreed in the [Charter for Customer Friendliness](#). Following the opinion of the Council of State on the (adapted) preliminary draft of the Royal

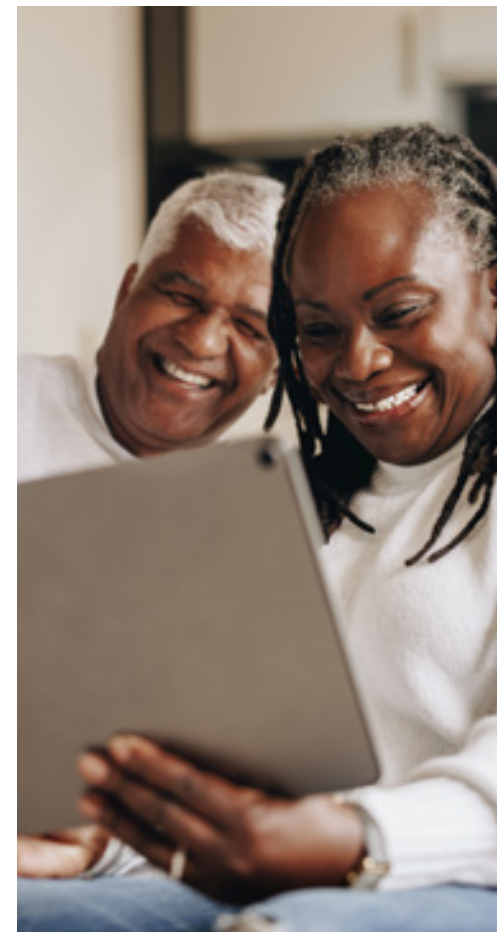
Decree, the BIPT also issued its opinion to the Minister of Telecommunications on the measures it could take after the opinion.

Transmitting installations in the North Sea.

The Royal Decree of 27 February 2024 regarding the granting of rights of use for the establishment and operation of transmission installations located in Belgium's exclusive economic area in the North Sea laid down the conditions for obtaining and exercising rights of use granted to transmitting installations located in Belgium's exclusive economic area in the North Sea. The transmitting installations in question are intended, among other things, to support the operation and maintenance of wind farms that require the use of wireless broadband communication techniques: in terms of communications, it is important that suitable and modern radio systems can be developed and installed.

Private radio communications and rights of use.

The BIPT participated in the preparation of the Royal Decree of 21 March 2024 amending the Royal Decree of 18 December 2009 on private radio communications and rights of use of fixed networks and trunked networks, more specifically as regards radio relay links and radio



5. For a complete overview of the current and future legislative work in the electronic communications sector, we encourage readers to refer to the 2025 Operational Plan.

3. Our interventions

relay link tariffs in the bands allocated exclusively to operators. In order to encourage operators to use spectrum more efficiently, a new model for calculating exclusive band fees has been introduced so that the operator pays for the amount of spectrum (scarce resource) it uses (annual fee per MHz instead of per link). For links in bands that are not exclusive, the situation is unchanged.

Social tariff. The BIPT participated with the FPS Economy in the preparation of the Royal Decree of 21 March 2024 amending the Royal Decree of 30 August 2023 on the processing carried out within the framework of Articles 22/2, § 7, and 22/3, § 10, of Annex 1 of the Act of 13 June 2005 on electronic communications. In the event of loss of entitlement to the social tariff, if the customer fails to respond to the operator within three months after the notification of loss of entitlement, the suspension of the subscription system has been replaced by an automatic migration system of the subscription to the most advantageous tariff plan of the commercial offer corresponding to the customer's consumption profile.

Various provisions. The BIPT also participated with the FPS Economy in the preparation of the Act of 3 May 2024 pertaining to various

provisions regarding the economy, which notably "absorbed" the part of a draft Act "various provisions" submitted for public consultation by the BIPT in 2023, which included corrections to the Act of 13 June 2005 on electronic communications in order to better transpose Directive 2014/61/EU of the European Parliament and of the Council of 15 May 2014 on measures to reduce the cost of deploying high-speed electronic communications networks. These included standards imposed on operators in terms of access to their physical infrastructure and information on that infrastructure for undertakings providing or authorised to provide public electronic communications networks and empowering the King to add additional information in order to facilitate investments in high-speed electronic communications networks by those undertakings. The Act of 3 May 2024 also introduced other modifications (following amendments), in particular with a view to introducing an obligation to provide a redundancy system for emergency calls, by providing for compensation by an operator in the event of an continuous interruption of more than 8 consecutive hours in the provision of a number-independent interpersonal electronic communications service, as well as in terms of the information made available to the FPS

Economy for the management of the social tariff.

Prepaid cards. The BIPT also participated in the preparation of the Royal Decree of 3 May 2024 amending the Royal Decree of 27 November 2016 on the identification of the end user of public electronic communications services provided by means of a prepaid card (Belgian Official Gazette of 21.05.2024). The objectives include the removal of rules which, following the Data Retention Act of 2022, have been incorporated into Article 127 of the Act on electronic communications (hereinafter "ECA"), bringing them into line with the concepts derived from the transposition of the European Electronic Communications Code and taking into account the experience gained in monitoring.

Spoofing. The BIPT lastly participated in the drafting of Royal Decree of 12 May 2024 to combat international voice calls with spoofed Belgian telephone numbers (hereinafter: "RD spoofing"). This decree aims to put an end to spoofing⁶ in the context of calls made from abroad to a number in Belgium, by making it compulsory for operators to block international calls made via a Belgian number to Belgian numbers for both geographical and mobile numbers, except for reliable applications.

3.1.2. Preparation of the digital sector regulation⁷

The BIPT has been assigned new powers in the framework of the implementation of various legal instruments of the European Union in the field of digital services. In collaboration with the FPS Economy, the BIPT has drafted the texts necessary for their implementation in Belgium.

Digital Services Act (DSA). In 2024, Belgium continued the implementation of Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market For Digital Services and amending Directive 2000/31/EC (Digital Services Act), best known to the general public by its acronym DSA. As a result, the Act of 21 April 2024 implementing Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market For Digital Services and amending Directive 2000/31/EC, amending Book XII and Book XV of the Code of Economic Law and amending the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors (Belgian Official Gazette of 15.05.2024) was adopted. Here too, the BIPT and the FPS Economy worked together to complete the

6. Spoofing refers to any situation in which a person usurps the identity of a trusted person (e-mail address, telephone number, IP address) in order to access confidential data or obtain an illegitimate advantage to the detriment of the victim.

7. For a complete overview of the current and future legislative work in the digital sector, we encourage readers to refer to the 2025 Operational Plan (<https://www.bipt.be/consumers/publication/operational-plan-2025>).

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implementation of the Regulation via a cooperation agreement between the Federal State and the Communities. The cooperation agreement of 3 May 2024, which designates the BIPT as the DSC, entered into force on 9 January 2025.

Gigabit Infrastructure Act. Since 2024, the BIPT has been involved in the work on the implementation of Regulation (EU) 2024/1309 of the European Parliament and of the Council of 29 April 2024 on measures to reduce the cost of deploying gigabit electronic communications networks, amending Regulation (EU) 2015/2120 and repealing Directive 2014/61/EU (Gigabit Infrastructure Act) which entered into force on 11 May 2024 and will be fully applicable from 12 November 2025. This regulation aims at accelerating the deployment of high-capacity networks in the European Union, including 5G and fibre.

e-Evidence Directive. The BIPT has also been preparing the transposition into Belgian law of Directive (EU) 2023/1544 of the European Parliament and of the Council of 12 July 2023 laying down harmonised rules on the designation of designated establishments and the appointment of legal representatives for the



purpose of gathering electronic evidence in criminal proceedings. The Directive must be transposed into Belgian law by 18 February 2026 at the latest.

Data Act. Since 2024, the BIPT has also been involved in discussions on the implementation of Regulation (EU) 2023/2854 of the European Parliament and of the Council of 13 December 2023 on harmonised rules on fair access to and use of data and amending Regulation (EU) 2017/2394 and Directive (EU) 2020/1828 (Data Act), which will be applicable from 12 September 2025.

Artificial Intelligence Act (AI Act). Finally, for some time, the BIPT has been following the evolution of the discussions with a view to the implementation in Belgium of the Artificial Intelligence Act⁸, some provisions of which will be applicable from 2025.

8. Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence and amending Regulations (EC) No 300/2008, (EU) No 167/2013, (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1139 and (EU) 2019/2144 and Directives 2014/90/EU, (EU) 2016/797 and (EU) 2020/1828 (Artificial Intelligence Act)

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3.1.3. Preparation of the cybersecurity regulation⁹

NIS2 Directive. The BIPT participated in the work on the transposition into Belgian law of Directive (EU) 2022/2555 of the European Parliament and of the Council of 14 December 2022 on measures for a high common level of cybersecurity across the Union, amending Regulation (EU) No 910/2014 and Directive (EU) 2018/1972, and repealing Directive (EU)

2016/1148 (NIS 2 Directive). This work resulted in the Act of 26 April 2024 laying down a framework for the cybersecurity of networks and information systems of general interest for public safety (Belgian Official Gazette of 17.05.2024).

The BIPT has become the competent sectoral authority within the framework of this Act for the tasks assigned to the sectoral authority and sectoral inspection service for the digital

infrastructure sector, with the exception of trust service providers within the meaning of Article 8, 24°, of this Act, and for the postal and shipping services sector. This Act make it compulsory for digital infrastructure providers, among other things, to analyse the risks regarding the security of their networks and information systems, and to adopt a security policy on personal data.

Cyber Resilience Act. Since 2024, the BIPT has been involved in the work for the implementation

in Belgian law of Regulation (EU) 2024/2847 of the European Parliament and of the Council of 23 October 2024 on horizontal cybersecurity requirements for products with digital elements and amending Regulations (EU) No 168/2013 and (EU) No 2019/1020 and Directive (EU) 2020/1828 (Cyber Resilience Act). This Regulation aims to define boundary conditions for the development of secure products with digital elements by ensuring that hardware and software products placed on the market are less vulnerable and that manufacturers take security seriously throughout the product life cycle. It also aims to create conditions enabling users to take cybersecurity into account when selecting and using products with digital elements, for example by improving transparency regarding the support period for products with digital elements made available on the market.

Post-quantum cryptography. The BIPT also monitors developments in European standards relating to post-quantum cryptography to support and control the post-quantum transition of digital infrastructure entities. Post-quantum cryptography protects encrypted data from decryption attempts made via quantum computers.

⁹. For a complete overview of the current and future legislative work regarding cybersecurity, we encourage readers to refer to the 2025 Operational Plan (<https://www.bipt.be/consumers/publication/operational-plan-2025>).

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3.1.4. Preparation of the media regulation

European Media Freedom Act. 2024 was characterised in the media field by the adoption of the Media Freedom Act. The BIPT is directly concerned as regulator of certain audiovisual and sound media in the bilingual Brussels-Capital Region. This regulation provides for new monitoring tasks and also affects the written press, which is the responsibility of the Federal State. If necessary, the BIPT stands ready to carry out new tasks within the framework of this Regulation, which will apply mostly from 8 August 2025.

3.1.5. Preparation of the postal sector regulation¹⁰

The BIPT also contributed to drafts amending the postal regulatory framework.

Environmental impact of parcel delivery. The Act of 21 February 2024 (Belgian Official Gazette of 17.05.2024) amending the Act of 26 January 2018 on postal services limits the environmental impact of unsuccessful parcel deliveries, on the one hand, by generalising the obligation for postal service providers to distribute parcels in parcel boxes and, on the

other hand, by promoting the development of parcel lockers. The BIPT was fully involved in the preparation of this Act and in the follow-up of the comments of the entities involved.

The Act of 21 February 2024 also provides for the legal basis for the regulation of parcel boxes prepared in collaboration with the BIPT, following on from the consultation of the sector regarding private letterboxes, carried out by the latter. The Ministerial Order of 2 October 2024¹¹ (Belgian Official Gazette of 7.10.2024) added standards regarding parcel boxes in the Ministerial Order of 20 April 2007 pertaining to the regulation of private mailboxes.

3.1.6. Tariff analyses

Analysis of telecommunications tariffs at national level. To help consumers gain a better understanding in a dynamic market where telecom offers change rapidly, the BIPT carries out a national price comparison every year since 2012. This is now the subject of two separate publications: one on mobile services, the other, on fixed and convergent services¹².

This exercise is resolutely pragmatic and takes as its starting point the real needs of consumers,

which are illustrated using clearly differentiated profiles that offer a broad and varied perspective of the telecommunications market. These profiles were subject to adjustments and a sector consultation during the first half of 2024. After three years, the time had indeed come to review them by taking into account new uses and consumption habits.

The national benchmarking regarding **mobile services** is currently based on five profiles, each one characterised by volume requirements (mobile data and call minutes), the levels of which progressively vary from basic to very high. Regarding the uses, the latest BIPT statistics¹³ show that 64% of residential customers choose mobile as a standalone product, whereas 36% include it in a bundle. For each profile, offers meeting at least their needs were taken into account.

According to the same report, at the end of 2023, bundles included an internet connection in 97.8% of cases. Convergent bundles accounted for 67.5% of the bundles on the Belgian residential market. This is why 100% of the nine profiles examined in the national study on **fixed and convergent profiles** an internet connection and 66.7% of them have at least one

mobile component in their definition. The idea followed by this tariff study is to guide consumers and give them all the “keys” they need to determine the minimum expenses to cover their telecoms needs. To that end, several solutions are analysed by comparing the results of commercial “turnkey” offers and those resulting from a “mix”¹⁴ of plans.

In 2024, both studies have shown that by being agile and regularly comparing plans consumers could make significant savings, in particular by choosing products from secondary or alternative operators, playing on the increase in mobile data included in the packages (mobile and convergent profiles) or removing the mobile service(s) of the bundle. The telecoms market is changing at the pace of technology. It is thus important to compare on a regular basis, among other things thanks to www.besttariff.be, the simulator of the BIPT.

These studies aimed at popularising information and making it as accessible as possible to as many consumers as possible, the characteristics of the 14 profiles studied and the cheapest offers of each operator meeting them are directly available in a few clicks on the dedicated pages on the BIPT website¹⁵.

10. For a complete overview of the current and future legislative work in the postal sector, we encourage readers to refer to the 2025 Operational Plan (<https://www.bipt.be/consumers/publication/operational-plan-2025>).

11. Ministerial Order of 2 October 2024 amending the Ministerial Order of 20 April 2007 pertaining to the regulation of private letterboxes.

12. A convergent bundle is a bundle combining both fixed telecom services (Internet and/or television and/or fixed telephony) and mobile services.

13. <https://www.bipt.be/operators/publication/the-situation-of-the-electronic-communications-and-television-market-2023>

14. A mix means the combination of two plans from two distinct operators to meet the requirements of a given profile.

15. <https://www.bipt.be/consumers/national-benchmarking-2024---fixed-and-convergent> and <https://www.bipt.be/consumers/national-benchmarking-2024---mobile>

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Analysis of telecommunications tariffs at international level. The BIPT's expertise in analysing telecommunications tariffs also extends internationally. As in previous years, the BIPT conducted a comparative international price study comparing the level of telecommunications tariffs on the Belgian market with those in neighbouring countries.

This study is conducted internally by the BIPT and can be seen as complementary to the international benchmark carried out each year by the European Commission. The BIPT study was the subject of a [Communication of 17 December 2024](#) regarding the comparative study on the price level of telecom products in Belgium and in the neighbouring countries.

The tariffs chosen for comparison are those of the cheapest offers that meet at least the telecommunications needs for a certain number of user profiles. It gave results for the mobile market, the fixed internet market and bundles¹⁶.

3.1.7. Sharing of expertise with our national, European and international partners

At national level, the BIPT cooperates with numerous institutional partners (such as the FPS Economy, the FPS Policy and Support but also the police, the judicial authorities and other regulators) to analyse, follow up and, if necessary, transpose a wide range of European legislative initiatives into national legislation. These include work on the Gigabit Infrastructure Act, the Regulation on fair access to and use of data (Data Act), the Artificial Intelligence Act, the Digital Services Act, the Regulation on addressing the dissemination of terrorist content online, the Regulation on rules to prevent and combat child sexual abuse, the Internal Market Emergency and Resilience Act (IMERA) and the Cyber Resilience Act. It should be recalled that Belgium held the presidency of the Council of the European Union from 1 January to 30 June 2024.

The BIPT is sometimes called upon to help its foreign radio spectrum management counterparts for very large events. In 2024, the NCS service was mobilised as part of the Paris 2024 Olympic and Paralympic Games. Six technicians assisted the ANFR for 18 days during the Olympic Games and five technicians were dispatched for 10 days during the Paralympics.

The BIPT also supports the Belgian Permanent Representation to the EU in the event of questions on these subjects or similar initiatives regarding the regulation of telecommunications and postal services markets, but also of new digital economies.

The BIPT also shares its expertise on regulation via the Centre on Regulation in Europe (CERRE¹⁷). CERRE is a think tank whose research focuses on better regulation in the energy and sustainability, technology, media, telecommunications, and mobility sectors. CERRE is composed of independent regulatory bodies (including the BIPT), companies and university research centres working in its various fields of expertise. In September 2024, CERRE published a report (to which the BIPT contributed), "The Future of European Telecommunications", in which it considers ways to change the economic

16. The comparative study of international prices and its results are further detailed in Chapter 2, under Title 2.1. Price studies.

17. <https://cerre.eu>

3. Our interventions

regulation of telecoms, the regulation relating to the protection of users and the treatment of resilience and security issues. Also in 2024, CERRE published a series of other reports, including on artificial intelligence, on competition between cloud services or on the implementation of the Digital Markets Act.

3.2. Our interventions for the general public

Informative videos. As the regulator of the postal market and the electronic communications market, the BIPT's tasks include understanding the end users of electronic communications and postal services, of anticipating their needs and of defending their interests. This is why the BIPT actively communicates with users to inform them of their rights and the tools at their disposal. Several animated videos have been created in recent years, in which the BIPT family, the parents, Izza and Benoit, and their children, Pablo and Thalia, explain several topics in a simple and accessible way, or how to solve a problem. All videos are available on the [BIPT's YouTube channel](#).

It is also crucial that the BIPT is known and clearly identified as the competent authority by



its target groups. In 2024, a public tender was launched, with the aim of communicating in an adapted way to the various stakeholders, about the BIPT's services and missions. The contract was awarded at the end of last year. From 2025, the BIPT will produce several profiling videos highlighting, in addition to its general functioning, some of its specific services. These videos will be used, among other things, to highlight the achievements of the BIPT on social media, but will also be used, for example, as a recruitment tool or broadcast at specific fairs to present the most relevant activities.

Social networks. The BIPT also uses the social media to react to current events, to give tips and tricks to postal and telecommunications service users and to draw their attention to certain developments in the postal service and telecommunications sector or the BIPT's activities. To do so, the BIPT uses sponsored and unsponsored publications.

5G knowledge and learning platform. In 2024, the BIPT promoted the dissemination of correct information on 5G, by providing objective and independent information to the ["Parlons5G"](#) website, in particular with quarterly analyses of available literature provided by Sciensano on the

potential effects of electromagnetic fields (EMF) and radio frequencies (RF) on health.

Targeted information campaigns. In addition to providing information to the general public, the BIPT also runs targeted information campaigns and takes part in trade fairs and conferences in its areas of expertise. More generally, the BIPT regularly informs retailers and retailer associations on the regulation regarding radio equipment and refurbished equipment and, for instance, the declaration of conformity of the manufacturer and the CE marking on these devices. The aim of these initiatives is to raise awareness among players on the Belgian and European markets about the importance of abiding by compliance regulations when selling radio equipment, and thus ensure the safety of users.

In 2024, the BIPT also intensified its efforts to address the problem of GSM repeaters, a sensitive topic for telecommunications operators. They keep reporting disruptions caused by companies or individuals using GSM signal repeaters purchased on the market. It is important to remind that these repeaters, even when they comply with the RED Directive, require explicit authorisation from operators in

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order to be owned and used. Only GSM operators are legally authorised to operate GSM frequency bands, and unauthorised use of these devices may cause harmful interference to the mobile network.

To address this issue, the BIPT undertook several actions in 2024:

- Sending a letter to all known vendors of GSM repeaters reminding them of the legal requirements related to their sale and use;
- Adapting its website to better inform consumers about the rules applicable to GSM repeaters and the risks associated with their use without authorisation;
- Collaborating with telecommunications operators so that they modify their own website to include clear references to the BIPT website and to improve public awareness.

These initiatives aim to reduce interference on operators' networks, to guarantee legitimate use of GSM frequency bands and to protect the quality of telecommunications services in Belgium.

NISDUC conferences. Within the framework of the NISDUC (NIS Directive User Community)



project, the RDI¹⁸ (Rijksinspectie Digitale Infrastructuur) and the NCSC¹⁹ (National Cyber Security Centre) organised the third NISDUC Conference on 23 and 24 April 2024 in The Hague, Netherlands. The Luxembourg Institute

of Science and Technology (LIST), the Luxembourg Regulatory Institute (ILR), the BIPT, the Computer Incident Response Center Luxembourg (CIRCL) and the Centre for Cybersecurity Belgium (CCB) also contributed to the success of the conference.

Under the theme "NIS2: Challenges and opportunities", the free two-day conference was open to Operators of Essential Services (OESs), Digital Service Providers (DSPs), competent authorities, Single Points of Contact, Computer Security Incident Response Team (CSIRTs), sector associations, cybersecurity institutions and other relevant stakeholders.

The program offered a wide range of themes related to the NIS Directive, addressed from different angles:

- Feedback from regulated entities and regulatory authorities;
- Changes in the regulatory framework and anticipation of future changes;
- Academic and advanced contributions to cybersecurity.

Over the two days, the conference gathered more than 450 participants from several countries, mainly from Belgium, Luxembourg, the Netherlands and Germany.

The next conference will be held in Luxembourg on 6 and 7 May 2025, following the alternate organisation established between the three Benelux member countries.

18. <https://www.rdi.nl/>

19. <https://www.ncsc.gov.uk/>

4. Our place on the European and international stage

During the first half of 2024, the international work of the BIPT focused mainly on the rotating presidency that Belgium held at the Council of the EU. In this particular context, the BIPT provided its technical expertise within the framework of this Belgian Presidency to contribute to its success.

The national regulation of electronic communications and postal services is broadly determined by the beacons set out at the European level. The EU rules assign to national regulatory authorities for telecommunications and postal services certain tasks, mainly advisory, carried out within independent European coordinating authorities (BEREC and ERGP). It is thus essential that the BIPT, being the Belgian regulator, be actively involved in the European organisations concerned so that national circumstances are taken into account.

Cooperation regarding regulation is essential to ensure the quality of regulation at national, European and international levels. Regulators rely on formal and informal cooperation mechanisms to help them reach their objectives. It is vital that regulators share their experiences and ideas, coordinate their strategic choices to ensure legal certainty and cooperate on certain

emerging issues, such as mechanisms promoting competition and protection of consumers.

International cooperation on regulation includes numerous approaches mainly focused on improving the interoperability of the various regulatory frameworks. This includes exchanging information and participating in international forums. International cooperation on regulation

is not limited to the regulatory design phase but also includes the implementation, the application, and the ex post management. Digital transformation presents new challenges to the current roles of the national regulatory authorities (NRAs) to which regulators must adapt (technological and market developments, digitalisation, sustainability, cybersecurity...).

Furthermore, the BIPT also acts as a representative of the Belgian State at European and international levels in the fields of electronic communications and postal services.

4.1. The Belgian Presidency of the Council of the EU in the first half of 2024

During the first half of 2024, the BIPT provided its technical expertise for telecommunications and postal market issues within the framework of the rotating presidency of the Council of the EU that Belgium held.

The BIPT was in charge, for Belgium, of two European legislative dossiers, the Gigabit Infrastructure Act (GIA) and a revision of the e-Privacy Directive:

GIA. Directive 2014/61/EU was adopted in 2014. This concerned measures to reduce the cost of deploying broadband electronic communications networks (Broadband Cost Reduction Directive, BCRD)²⁰. In order to ensure a more efficient deployment of new telecommunications networks, this Directive contains a number of rules, for example on the re-use of existing physical infrastructure (among



20. Directive 2014/61/EU of the European Parliament and the Council of 15 May 2014 on measures to reduce the cost of deploying high-speed electronic communications networks, OJ L 155/1, 23.05.2014.

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other things) of public utility companies and the coordination of civil engineering works in all sectors. In the meantime, 2018 saw the adoption of Directive 2018/1972 establishing the European Electronic Communications Code²¹ (EECC), which introduced new concepts, such as “Very High Capacity Networks” (VHCN), that go beyond what was stated in the BCRD in terms of performance.

In addition, the European Commission has also stated that to meet the ever-increasing demand for higher speeds, telecommunications operators need to invest heavily in the deployment of “fibre to the home” (FTTH), taking into account the 2030 objective of providing all end users in a fixed location with gigabit network coverage. The European Commission has therefore decided to review the BCRD and submit a proposal for the Gigabit Infrastructure Act (GIA) on 23 February 2023.

And the Belgian Presidency created the conditions for an agreement between the Council of the EU and the European Parliament, the co-legislators, on the night of 6 February 2024. The new Regulation entered into force on 11 May 2024 and will be fully effective from November 2025. The Gigabit Infrastructure Act

is intended to reduce the administrative burden and encourage the deployment of broadband networks, which will enable citizens to gain faster access to fibre and 5G and, ultimately, to have a better digital experience on the next-generation networks.

e-Privacy Directive. As regards the e-Privacy Directive, Council conclusions on the future of EU digital policy were adopted on 21 May 2024 at the initiative of the Belgian Presidency. These Council conclusions provide clear means of action for the Commission to determine the direction in which the dossier should develop.

In addition, the BIPT supported the Belgian work on the “Postal Directive” dossier. The BIPT contributed to the Presidency Report for a new Postal Directive as well as to the Belgian high-level event on the postal market, under the EU Presidency, entitled: “High level Conference on the need for a new postal services directive”.

In addition, the BIPT took a significant part in two other major initiatives, namely the Belgian contribution to the public consultation launched by the European Commission on the White Paper “How to master Europe’s digital infrastructure needs?” and the “Council

conclusions on the future of EU digital policy”.

Within the framework of the Belgian Presidency of the Council of the EU, the BIPT also contributed to other dossiers, both with the Permanent Representation of Belgium to the EU and with other bodies, such as the FPS Economy.

4.2. The BIPT as a regulator

BEREC. The Body of European Regulators for Electronic Communications (BEREC) is a European advisory body whose operation is referred to in Regulation 2018/1971 of 11 December 2018²². It contributes to the development and better functioning of the internal market for electronic communications networks and services, by ensuring a consistent application of the EU regulatory framework. BEREC is a non-decision-making body, based on the expertise of regulators. The independence of BEREC from governments and the Commission is an essential element in maintaining its effectiveness.

The members of BEREC are the electronic communications regulators from EU countries; the European Commission acting as an observer.

It prepares opinions, guidelines, reports, recommendations, common positions and best practices on the regulation and development of electronic communications, and supports the implementation of the European regulatory framework. It also organises public consultations. In that respect, it contributes to a better functioning of the market for electronic communications networks and services. In line with technological developments and the phenomenon of convergence between telecommunications networks and services on the one hand, and digital services on the other hand, BEREC now incorporates in its work program new issues beyond the traditional scope of telecommunications regulation (satellite networks, Content and Application Providers - CAPs, cloudification²³). BEREC performs its tasks in collaboration with the NRAs and the European Commission. It reinforces cooperation among NRAs but also between the NRAs and the European Commission. BEREC is the most important advisory body of the European institutions in the field of telecommunications.

BEREC is competent to assist and advise the NRAs, the European Parliament, the Council and the Commission, and cooperate with the NRAs and the Commission, upon request or on its own

²¹. OJ L 321/36, 17.12.2018.

²². Regulation (EU) 2018/1971 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.

²³. Cloudification is a technological evolution that replaces physical equipment with software solutions available in virtualised environments. This phenomenon follows the growing capacity needs generated by the evolution of electronic communications toward the virtualisation of network functions (BEREC, External study on the trends and cloudification, virtualization, and softwarization in telecommunications, Plum Consulting, 2023, p.31).

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initiative, on any technical matter regarding electronic communications within its competence. BEREC's competences are mainly implemented within the framework of working groups, composed of experts from the regulators ("bottom-up" operation).

In 2024, the BIPT contributed to the implementation of the BEREC Work Programme 2024 under the chairmanship of HAKOM, the Croatian regulator²⁴. The priorities are consistent with the 2021-2025 strategy, meaning: promoting full connectivity, supporting sustainable and open digital markets, and empowering end users. The BIPT was represented within BEREC's twelve working groups and governance bodies (Board of Regulators, Contact Network, BEREC Office Management Board, BEREC Office Advisory Group). BEREC published about forty reports, opinions or guidelines. BEREC's attention focused on the review of the implementation of the European Electronic Communications Code (general authorisations, user rights), the planned revision of the roaming regulation, the preservation of an open internet, the control of access to physical infrastructure within the framework of fixed networks (conduits, antennas), geographical surveys on network

deployments. Subjects such as sustainability (data retention and infrastructure sharing), cloudification, the Digital Decade policy programme (DDPP), promotion of VHCN²⁵, DSA²⁶ and DMA²⁷ were thoroughly discussed in 2023.

BEREC has also started extensive internal reflection work, in connection with the forward-looking documents published by the European Commission (White Paper, Draghi Report and Letta Report) with a view to review the regulatory framework for electronic communications, scheduled for the end of 2025²⁸. BEREC has also launched a process of drafting its new strategy 2026-2029.

In 2024, BEREC organised various events, such as a Stakeholder Forum and various workshops ("Ex ante regulatory experience concerning commitments", "Wholesale-only undertakings and commercial agreements review", "Satellite technologies in mobile communications").

DSA Board. The European Board for Digital Services (the "Board") serves as a platform for fostering compliance, enhancing cooperation, and ensuring the effective and coherent implementation of the DSA throughout the EU.

The Board, composed of all designated Digital Services Coordinators (DSCs), is chaired by the European Commission and advises the European Commission and DSCs on supervisory matters and emerging challenges in digital services.

Prior to its official appointment as coordinator, the BIPT participated as an observer in the fourteen meetings of the Board. It discussed the establishment and organisation of the Board and its eight working groups, the preparation of providers of intermediary services for risk mitigation in the context of elections (European, national, regional and local in different Member States), the Code of conduct on countering illegal hate speech online, the Code of Practice on Disinformation and the formal procedures launched by the European Commission against several very large platforms.

Then, as the DSC for Belgium, the BIPT ensured the transmission of the Belgian point of view to the Board, including the constraints imposed by Belgian law on the BIPT.

AI Board. The European Artificial Intelligence Board provides advice and assistance for the implementation and enforcement of the AI Act, ensuring that there is a good balance between

innovation and forward-looking approach on the one hand, and respecting and protecting the fundamental rights of EU citizens on the other hand. This Board is composed of representatives from all EU Member States and is assisted by the AI Office of the European Commission. In 2024, six subgroups were created within the AI Board to deepen specific parts of the AI Act, around which further clarification is still needed. These subgroups address prohibited AI practices, standards, AI regulatory sandboxes, general purpose AI (GPAI) governance, the creation of an innovative ecosystem, and the interaction between the AIA and both the Medical Devices Regulation (MDR) and the In Vitro Diagnostic Medical Device Regulation (IVDR). The BIPT is represented in the first three subgroups.

IRG. The "Independent Regulators Group" brings together 37 members (European telecommunications regulators from EU Member States and other European countries). The IRG acts as a facilitator for its members and provides flexible support to fulfil their role. They work on improved collaboration, mutual assistance and the sharing of information among regulators. The BIPT participated in several workshops and webinars organised by the IRG. The work of the IRG is of strategic importance, given the

24. [BEREC Work Programme 2024](#)

25. Very High Capacity Networks (VHCNs) are very high-capacity electronic communications networks which are entirely made, at least up to the distribution point, of optical fibre elements or which are able to offer similar network performance under usual peak-time conditions. Among other requirements, a VHCN must be able to provide a minimum download speed of 1Gbps.

26. The Digital Services Act (DSA) is a European regulation which aims to better protect online consumers, oblige online platforms to act in the most responsible and transparent manner, and stimulate innovation, growth and competition.

27. The Digital Markets Act (DMA) is a European regulation which aims to foster competition in the European digital markets and to prevent abuse of power by the very large platforms (gatekeepers).

28. <https://www.berec.europa.eu/en/document-categories/berec/others/berecs-input-to-the-ec-public-consultation-on-the-white-paper-how-to-master-europes-digital-infrastructure-needs>, 28.06.2024.

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discussions on the future of telecommunications and the role of regulators. The work focuses on “capacity building” and information for NRAs.

The ERGP. The European Regulators Group for Postal Services (ERGP) is a consultative and deliberative body gathering the postal regulators delivering opinions to the European Commission in the field of postal services.

The ERGP Work Programme 2024, drafted in 2022, was part of the ERGP Medium-Term Strategy 2023-2025, which was built on three pillars, namely:

1. revisiting the postal sector and its regulatory framework in light of environmental sustainability and digitalisation;
2. promoting a competitive single EU postal market in the context of rising e-commerce deliveries;
3. empowering end-users and ensuring a user-oriented universal service.

In 2024, the BIPT participated in two plenary meetings and the five following ERGP working groups: “Regulatory Framework”, “Sustainability”, “Access and Interoperability”, “Cross-border parcel delivery” and “Consumers and Market Indicators”. The BIPT managed a working group “Consumers

and Market Indicators”, in collaboration with the Maltese regulator, [MCA](#). This working group published three external ERGP reports: “ERGP Report on the postal service needs of vulnerable users”, “ERGP Report on Quality of service, consumer protection and consumer handling” and “ERGP Report on core indicators for

monitoring the European postal market”. Before the ERGP plenary session in Vienna, this working group, led by the BIPT and MCA, also organised an open external ERGP workshop on “Vulnerable users in the postal world: Who? Which needs? What’s next?” in the context of the needs of the vulnerable user in the postal world. In 2025, the



BIPT will continue to lead the ERGP working group on “Consumers and Market Indicators” as vice-chair.

CERP. The European Committee for Postal Regulation (CERP) ensures a good coordination between its members and seeks to promote compliance with the “acquis communautaire”. The BIPT participates as the postal sector regulator in Belgium. In 2024, the Institute organised the plenary meeting in Brussels, within the framework of the Belgian Presidency of the Council of the EU.

This plenary session focused on the modernisation of the internal functioning of CERP, on the one hand, and on the international work of CERP, and in particular on cooperation with the UPU, on the other hand.

Furthermore, the BIPT played an active part in the “UPU” working group of CERP, whose main task was the European preparation of the biannual meetings of the UPU, in which the BIPT represents Belgium.

IIC. The International Institute of Communications (IIC) is an independent international forum that brings together national regulators, competition

4. Our place on the European and international stage



authorities, companies and other stakeholders to discuss issues related to the telecommunications, media and technology sectors. In 2024, the BIPT hosted the IIC Europe Forum 2024, where current and relevant topics were discussed,

including “Digital economy priorities for the next Commission”, “Piecing together the raft of European cyber regulations”, “Implementation realities: DMA, DSA” and “AI Act: Implementation & enforcement progress report”.

Fratel. The BIPT is a member of the French-speaking telecommunications regulatory network (Fratel). This international network of regulators from French-speaking countries organises a seminar and a meeting every year. It collects data by sending questionnaires. In 2024, the work carried out under the Luxembourg Presidency enabled the establishment of a platform dedicated to mapping the coverage and quality of mobile services. In May, the seminar examined the challenges of the data economy and mobile payment. The 22nd annual meeting in November discussed the future of networks and regulation, in particular the regulation of the markets for data and digital services. The BIPT contributed to the work by sending replies to the questionnaires.

4.3. The BIPT as the representative of the Belgian State

4.3.1. Specialist organisations of the United Nations

UIT. The International Telecommunication Union (ITU) is the worldwide authority for information and communications technologies. The ITU is mainly active in three sectors: managing the radio-frequency spectrum and satellites (ITU-R),

developing technical standards for telecommunications (ITU-T) and its global TIC development operations (ITU-D).

ITU-T is responsible for standardisation work in telecommunications and ICT. Standardisation work focuses on networks, AI, cybersecurity, IoT and “quantum tech”²⁹. ITU-T is also active in the field of specifications for interoperability of telecom networks (architecture, services, protocols, addressing/numbering plans) and submarine cables.

The World Telecommunication Standardization Assembly (WTSA) meets every four years to set the direction and structure of ITU-T. The WTSA sets the general policy, reorganises the study groups, approves the work programmes, appoints the chairs and vice-chairs of the study groups.

The World Telecommunication Standardization Assembly (WTSA-24) took place from 15 to 24 October 2024, with the objective of defining the vision and framework of ITU-T for the study period 2025-2028. The conference identified artificial intelligence, the implementation of reliable, inclusive and interoperable applications for metaverse, sustainability, public digital

²⁹ Quantum technologies are technologies that rely on the fundamental principles of quantum mechanics, such as superposition or entanglement. They find concrete applications in fields such as computation (with quantum computers), detection (with quantum sensors) or communication. Quantum cryptography, for example, uses these principles not only to secure communications, but also to deeply rethink the fundamentals of cybersecurity.

4. Our place on the European and international stage

infrastructure, automated driving and mobile device location for emergency communications as priorities. The BIPT participated in the European coordination of ITU-T work within the COM-ITU of CEPT (European Conference of Postal and Telecommunications Administrations). CEPT has 46 members from Europe. COM-ITU is responsible for ITU standardisation work in telecommunications/ICT.

UPU. The Universal Postal Union (UPU) supervises the international postal exchange. The Universal Postal Congress is the highest policy-making body of the UPU and is held every four years. It gathers the representatives of the 192 Member countries to decide on the reform of the UPU, to adopt a new global postal strategy and establish the future rules applicable to the cross-border postal traffic. Between two Congresses, the Council of Administration (CA), made up of 41 Member countries, and the Postal Operations Council (POC), made up of 48 Member countries, continue the Union's work.

In 2024, the BIPT continued to carry out its four-year mandate within the UPU as a member of the CA on behalf of Belgium, and as Vice Chair of the Council of Administration for Western Europe. As vice-chair, the BIPT, on behalf of

Belgium, is a member of the Management Committee of the UPU Council of Administration, within which the Institute prepares the work of the Council of Administration. In accordance with the proposals adopted by the Extraordinary Congress of plenipotentiaries of the UPU in 2023, work was carried out, among other things, on a concrete proposal to further modernise the UPU, in particular with a view to opening it up to other stakeholders. In this context, the conditions under which postal operators, other than the designated provider (bpost in Belgium), can participate in the specific work of the UPU, particularly in the new areas of e-commerce, were examined.

4.3.2. The European Commission

COCOM. The Communications Committee assists the Commission (COCOM) in carrying out its executive powers and is composed of representatives of EU Member States. The BIPT participated as an expert in the activities of the COCOM, and particularly in three meetings.

PDC. The Postal Directive Committee (PDC) is the postal counterpart of the COCOM. The BIPT, together with the FPS Economy, closely follows the work of this committee and attended two

meetings last year. In June and December, the BIPT gave a presentation on the work of the UPU on "Postal Policy and Regulation" and "Physical Services and E-Commerce". Furthermore, the BIPT gave a presentation on the "ERGP Report on the needs of postal services for vulnerable user" in December.

RSPG/RSC. The Radio Spectrum Policy Group or RSPG is a high-level advisory group assisting the European Commission in the development of the radio spectrum. The Radio Spectrum Committee or RSC is responsible for specific technical measures necessary to implement the radio spectrum policy. It is made up of representatives of the Member States and is chaired by the European Commission.

As the radio spectrum and the related matters by nature exceed the national borders and in view of the objective of a harmonised use of spectrum in Europe, the RSPG's and RSC's work within the European Commission's Directorate-General "Connect" is closely followed by the BIPT. Concerning the implications in Belgium of the activities of the RSC and RSPG, a consultation is held if necessary with the Communities (who are in charge of broadcasting). The RSC meets four times a year, and the RSPG three times.

In 2024, the focus was on the evaluation of the World Radiocommunication Conference (WRC-23) of ITU and the identification of possible scenarios for the use of the 1980-2010 MHz and 2170-2200 MHz frequency bands by mobile satellite services after 2027. The RSC has defined the technical parameters for harmonising the band 40.5-43.5 GHz and Wi-Fi systems in the 6 GHz band (5945-6425 MHz).

The RSPG also attaches great importance to the introduction of 6G and believes that a proactive attitude is essential to support the development and deployment of 6G in Europe. Early recognition of spectrum needs will facilitate the first launch and operation of 6G networks and services from 2030.

In 2024, the RSPG drafted a report which was submitted to a public consultation in early 2025. This work is based on an assessment of coverage and capacity needs for 6G taking into account the ITU-R IMT-2030 framework³⁰. It also addresses interaction with satellites and unauthorised use. It addresses long-term spectrum availability and implementation strategies for 6G.

RE EG. The expert group on radio equipment is also chaired by the European Commission. In

30. IMT-2030, approved in 2023 by the ITU Radiocommunication Assembly, sets the framework for the development of radio interface standards and technologies for sixth generation mobile systems, commonly referred to as 6G.

4. Our place on the European and international stage



In addition to representatives of the Member States, it includes representatives of stakeholders such as the industry, European standardisation organisations, consumer organisations, market surveillance organisations and notified bodies.

In 2024, the BIPT participated in a physical and an online meeting. Various technical and legal topics were discussed, such as standardisation activities within the framework of Delegated Regulation (EU) 2022/30 on cybersecurity under RED, the interaction between RED & AIA (Regulation (EU) 2024/1689 on artificial intelligence), the universal charger and the study on wireless charging, but also the issues of refurbished products, reconfigurable radio systems, radio equipment integrated in vehicles, etc.



Belgian Institute
for postal services
and telecommunications

CHAPTER 2.

REALISATION OF OUR STRATEGIC OBJECTIVES IN 2024





2.1. COMPETITION AND MARKET DEVELOPMENT

The strategic objectives of the BIPT are specified in its three-year Strategic Plan. In this Strategic Plan, the BIPT defines strategic axes according to which it organises its activities with a view to achieving the objectives assigned to it. These axes are the main themes on which the BIPT intends to focus as a priority during the period concerned.



2.2. USER INTERESTS

The details of the implementation of the objectives are specified in annual operational plans.



2.3. DIGITAL INFRASTRUCTURE SECURITY

Although the [2024 Operational Plan](#) resulted from the previous Strategic Plan, this chapter is presented along the five pillars of the [2024-2026 Strategic Plan](#), namely:

- Competition and market development;
- User interests;
- Digital infrastructure security;
- Control and support;
- Efficient functioning.



2.4. MONITORING AND SUPPORT

This chapter includes the concrete actions that were taken by the BIPT, in addition to its daily operations, to achieve its strategic objectives. It gives an overview of the execution of the 2024 Operational Plan.



2.5. EFFICIENT FUNCTIONING

1. Competition and market development

Competition plays an essential role in the dynamism and balance of markets, promoting innovation, diversity of offers and advantageous tariff conditions for consumers. Beyond its economic impact, it also contributes to social well-being by ensuring equitable access to efficient and affordable electronic communication, media and postal services.

In this context, the BIPT ensures that the markets for which it acts as supervisory or regulatory authority develop competitively, that innovation is stimulated and that this development is sustainably achieved. The related objectives are the promotion of competition, the development of the internal market and the promotion of VHCN connectivity, as well as the management of scarce resources and the relevant digital regulation.

1.1. Promotion of sustainable competition and development of the internal market

1.1.1. Monitoring of the telecommunications and postal services markets

To carry out its missions in the regulated sectors, the BIPT must have a perfect insight into the situation of the markets. Market surveillance also allows to measure the impact of regulation a posteriori. For these reasons, monitoring is a fundamental activity of the BIPT.

a) Monitoring of the electronic communications market

European Digital Decade. Belgium's competitiveness in the field of information technology is measured within the framework of the European Commission's Digital Decade Policy Programme, setting digital objectives for 2030. The reporting tracks the progress of Member States in achieving the digital objectives.



REALISATION OF OUR STRATEGIC OBJECTIVES IN 2024

2.1. COMPETITION AND MARKET DEVELOPMENT



1. Competition and market development

Regarding the digital infrastructure indicators, i.e. the coverage of fixed networks with a speed of 1 Gbps (VHCN) and the 5G coverage, Belgium achieved results above and below the European average respectively: 95% versus 79% and 40% versus 89%³¹. The delay in 5G coverage, largely due to the late finalisation of the 5G spectrum auctioning, was partially reduced at a steady pace in our country in 2024. The European Commission points out in its report that despite the improvements over previous years, Belgium is still lagging behind regarding optical fibre coverage (25% versus a 64% average). As with 5G, fibre deployment is expected to accelerate and Belgium is expected to catch up its delay in the coming years.

Valuation of the assets brought by Fluvius to Wyre. In 2023, Telenet and Fluvius created the infrastructure company Wyre, which is responsible for the management of the existing networks of Telenet and Fluvius. When Wyre was created, Fluvius brought various assets, including the coaxial network, FTTH test projects, (unused) ducts, etc. Article 66 of the ECA provides a framework for the transfer of resources from activities subject to exclusive or special rights to activities relating to public electronic communications networks or services,

which must be carried out on market terms. Following its analysis already started in 2023, the BIPT published its [Decision](#) on 19 November 2024, in which it found no obvious undervaluation of all the assets brought by Fluvius to Wyre and in which the BIPT concluded that the condition of Article 66 was therefore fulfilled.

Antenna site sharing. The site-sharing regime introduced in Belgium aims to reconcile the needs of competition with environmental, public health, public safety and town and country planning objectives. The BIPT plays an observer role at the meetings of the non-profit organisation Radio Infrastructure Site Sharing (hereinafter: "RISS"), which was created by operators to manage the operational sharing of sites, and facilitates more generally the sharing of this type of infrastructure in Belgium. The healthy competition objective is even more important when new operators enter the market. The site sharing regime facilitates the deployment of the new player Digi-Citymesh. Digi-Citymesh continued to develop its own network in 2024. In addition to the sharing of antenna sites provided by law, Digi-Citymesh entered an agreement with Proximus regarding wholesale services and mobile infrastructure. This agreement enables Digi-Citymesh to



acquire the sites that would be decommissioned as part of the consolidation of Proximus' and Orange's networks.

Sustainability of the Belgian telecommunications networks. Digital transition is one of the main pillars of ecological transition as it enables other

31. Source: <https://digital-strategy.ec.europa.eu/en/library/digital-decade-2024-country-reports>

1. Competition and market development

sectors to improve their sustainability more quickly and in greater depth. The increase in data consumption induced by this transition could however lead to continued growth in the ecological impact of digital infrastructures. Following the studies published in 2022 and 2023, the BIPT started to prepare in 2024 a new study in which the collection of data from operators was extended by establishing and quantifying scenarios that could be followed by operators and users. This approach will facilitate follow-up. This study will also take into account recent developments, such as the results of the European Commission report on measuring the footprint of electronic communications networks and the new horizontal sustainability reporting obligations within the framework of the CSRD (Corporate Sustainability Reporting Directive).

b) Market monitoring of postal services

[The postal observatory](#) was created to broaden market knowledge and to show the developments in the postal sector by means of diagrams. It represents the postal sector by means of economic data such as market shares, data regarding employment and investments, volumes, revenue, network development... The information dates back to 2010 and documents the market developments by means of reliable data (see

3.2.1.). [The observatory regarding the 2023 postal activity market](#) was published on 1 October 2024.

1.1.2. Telecommunications market analyses and enforcement measures

a) Market analyses

The purpose of a market analysis in the electronic communications sector is to define the relevant markets and assess if certain operators have significant market power. Upon defining the “relevant market” the products and services of that market are described and the geographical scope of the market is determined.

Operators with significant market power have an economic power enabling them, to a large extent, to act independently of competitors, customers and consumers on the market concerned. Specific obligations are imposed on these operators. The basic obligation is generally to open the network of these operators to competing operators. This obligation is often accompanied by additional obligations (transparency, non-discrimination, control of wholesale prices).

The BIPT essentially analyses wholesale markets,

meaning that they concern services that telecommunications operators buy from each other. Wholesale markets are regulated with a view to making retail markets (services intended for consumers and businesses) more competitive.

Review of the broadband and broadcasting wholesale markets.

The year 2024 was devoted to the further preparation of the review of the broadband and broadcasting wholesale markets. The services that are traded in these markets are necessary to enable new entrants to compete with incumbent operators both on the broadband internet access segment and on the segment of bundles, including both internet access and broadcasting services (“multiple play bundles”). Competition is likely to take place either at the infrastructure level (several operators build their own infrastructure) and/or at the service level (several operators use the same infrastructure). In 2023, the BIPT commissioned a consultant to develop a model to objectify the definition of areas where infrastructure-based competition between FTTH operators could be economically viable and areas where one or other form of cooperation between operators (with a competition between services on a common infrastructure) could be expected. This study, which was finalised in 2024, shows the

significant impact of population density on the profitability of FTTH investments and therefore the potential value of cooperation between operators. On 10 October 2023, the BIPT published a communication clarifying the conditions that should be met by such cooperations in order to guarantee effective and sustainable competition for the benefit of end-users. In the spirit of this communication, Proximus and Telenet concluded a Memorandum of understanding in July 2024, which envisaged distributing the deployment of fibre over part of Flanders. This cooperation project is the subject of an investigation opened by the Belgian Competition Authority with which the BIPT collaborates closely. In addition, the 4th mobile operator, Digi-Citymesh Belgium, entered the fixed market at the end of 2024, even though it is currently on a limited scale. These developments and their consequences will be closely scrutinised within the framework of the new market analysis. More specifically, if the operators reach a final agreement that meets the conditions expressed by the BIPT and the Belgian Competition Authority, it will likely no longer be necessary to regulate the wholesale broadband markets, at least in the area concerned by the cooperation.

1. Competition and market development



Review of the wholesale dedicated capacity market analysis. In 2024, the BIPT started preparatory work for the revision of the wholesale dedicated capacity market analysis (market 2 of the European Recommendation on relevant markets of 18 December 2020). This market is primarily focused on connectivity for non-residential users, who have higher quality requirements, which cannot be met using standard broadband products. This preparatory work includes the start of the process of coherent collection of geographical data from the operators concerned, as well as the sending of qualitative and quantitative exploratory questionnaires, in order to map developments and market shares in this market. Work on this market analysis will continue in 2025.

Call termination (fixed and mobile). The end-to-end connectivity (i.e. the possibility for every user to reach other users and to be reached by them) is an essential principle of the regulatory framework for electronic communications. The provision of (fixed or mobile) call termination services is essential to ensure end-to-end connectivity. After a public consultation in 2023, the BIPT adopted a decision on 23 July 2024 which lifted the obligations previously incumbent upon operators on these markets. This

deregulation has been made possible, on the one hand, thanks to the framework for termination rates that has been implemented at European level and, on the other hand, thanks to certain commitments proposed by the main operators, in particular the commitment to maintain a public reference offer over the coming years.

b) Inspection and validation of the reference offers

The obligation of transparency consists in requiring SMP operators to publish certain accounting, technical or tariff information. When the regulator imposes this obligation³², SMP operators must establish a reference offer which will serve as a basis to offer other operators access to their infrastructure. This is particularly the case for wholesale access markets. The reference offer describes all the options for access and related services, the conditions for the provision of services, the rights and obligations of the provider and user, all of the processes and tools that have been introduced, the tariffs for the rental of lines and the services the operator concerned must provide.

In the market analyses mentioned under point 1.1.2. above, new obligations have been imposed upon SMP operators. The BIPT monitors the

32. Pursuant to Article 59 of the Act of 13 June 2005 on electronic communications.
 33. Operators designated as having significant market power on the relevant market.

1. Competition and market development

proper and timely implementation of these obligations, including the necessary amendments to the reference offers.

Proposed amendments by operators with significant market power to their reference offers are systematically subject to a pre-consultation with operators purchasing wholesale services from those operators. In 2024, the BIPT examined and approved a number of changes to the reference offers of the SMP operators³³ Proximus, Unifiber and VOO.

c) Rates in line with an efficient operator's costs

The tariff conditions of the reference offers encompass two major categories of tariffs:

- one-time fees pay for the specific technical services such as the activation of the service or the installation by a technician;
- monthly rental fees compensate the incumbent for the use of, for instance, the local loop.

The BIPT examines the elaboration of these tariffs and ensures that they reflect the operational and financial reality of an efficient operator.

Monthly fees for access to the point-to-point

FTTH network of Proximus's joint ventures (Fiberklaar and Unifiber) and monthly fees for Ethernet transport within the framework of Proximus's wholesale offers. The verification of these fees is based on cost models that were subject to consultations in 2023 and 2022 respectively. Due to the analysis of the cooperation project between Proximus and Telenet (which, as described above, may affect the need for regulation), these projects have been postponed.

Margin squeeze. The BIPT ensures that operators with significant market power do not apply any margin-squeeze practices. There is a margin squeeze when retail revenues do not sufficiently cover certain costs (wholesale, network and retail costs). In principle, these margin squeeze tests are first carried out on a broad portfolio of products, so that the regulated operator can retain a degree of flexibility in its pricing policy. Portfolio tests can also consider individual products. At that level, only costs considered as incremental are taken into account. This test began in 2023 and the [conclusions](#) were published in 2024. The BIPT could not find any margin squeezing practice that should have given rise to a formal notice. On the basis of the knowledge gained during the

performance of this test, the guidelines for the application of a margin squeeze test have been adapted. In addition to tests on the portfolio and products on the residential and small business markets, the BIPT also conducted a margin-squeeze test on selected individual contracts of Proximus on the large business market in 2023 and 2024. Again, no margin squeeze practices were found. The results were published in 2024 and in [early 2025](#) respectively. In 2025, the BIPT will carry out new margin squeeze tests, both for the residential market and for a selection of individual contracts on the large business market.

d) Other measures to foster competition

Fostering competition does not rely solely on measures resulting from market analyses and consequently imposed on operators with significant market power. Other measures imposed on all operators are also aimed at stimulating competition.

Free choice of network terminal equipment for broadband and TV services. The BIPT is also responsible for monitoring and enforcing the regulations on terminal equipment, pursuant to Articles 32, 36 and 38 of the ECA. On 26 September 2023, the BIPT published its [Decision](#) confirming free choice of modem,

excluding set-top boxes and business services. By means of this decision, the BIPT provided greater clarity as to the way in which it interprets the regulations on terminal equipment, in accordance with BEREC's guidelines. The BIPT also addressed the publication of the technical specifications needed to ensure that freedom of choice of modem is implemented in the best possible way. End-users were able to use it from 1 November 2024. As this date approached, the BIPT had already checked whether operators met this requirement. After its entry into force and in the future, the BIPT will deal with complaints from end-users in this regard.

1.1.3. Digital sector

The Data Act, which will apply from 12 September 2025, aims to facilitate access to and use of data, so that the full potential of data can be exploited for innovation, economic growth and societal benefits. It is a cross-sectoral regulation that aims to establish fair access to data related to connected products and the services related to them (IoT), specifying who has the right to use this data, under what conditions and on what basis, in a B2C and B2B context. It also aims to facilitate the change of data processing service (cloud service) and

1. Competition and market development

promote efficient data interoperability. Finally, the regulation creates a framework in which public sector bodies can request data from businesses (B2G³⁴), subject to the conditions, on the basis of exceptional need.

The BIPT closely follows and actively participates in discussions and work on the implementation of the Data Act in Belgium and at European level. In 2024, the BIPT contributed, among other things, to discussions and work with the FPS Economy, during which it formulated proposals for the development of a governance framework at national level. The BIPT also participated in the various workshops organised by both the European Commission and BEREC.

1.2. Scarce resources management

Frequencies and numbers are only available in a limited quantity. An efficient use of these scarce resources is crucial to ensure sustainable competition and allow innovation. International coordination is crucial in this area as well. The BIPT actively takes part in international expert groups striving after the rational use of frequencies and numbers (ITU, RSPG, RSC, CEPT...) in the context of new applications and new technologies.



1.2.1. Numbering plan management

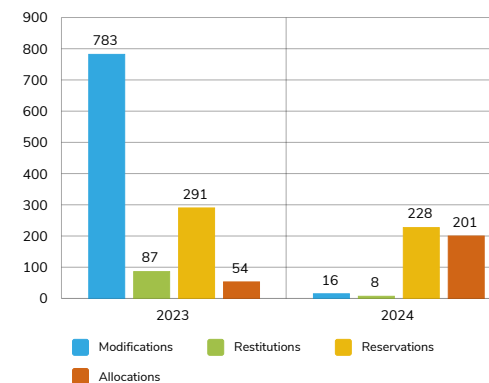
The BIPT is tasked with managing the national numbering plan and the granting and withdrawal of rights to use those numbers. To that effect, it works together with all the other European regulatory bodies to have the policy approaches regarding numbering in Europe converge as much as possible.

Effective management. As the authority managing the numbering plan, the BIPT ensures that this scarce resource is used as efficiently as possible. Therefore, the numbering plan is regularly adapted to allow for new services and to preserve the numbering space if necessary. A

study was conducted on the appropriateness of sub-allocating telephone numbers. In addition, the BIPT has committed to co-chair the WHOIS domain name work axis within ENISA³⁵ in order to publish guidelines on the application of Article 28 of the NIS2 Directive. The transposition of this Article into the ECA has also been prepared by the BIPT. A number of requests concerning the extraterritorial use of numbering resources were approved. The non-profit organisation DNS.be's request to increase the wholesale prices of ".be" domain names was accepted after a thorough study.

Operational management. In 2024, the BIPT handled 453 numbering requests. As shown in the chart below, requests for modification and allocation were strongly on the increase in 2023, respectively due to the transfer of Telenet's assets to another entity of the group and of Brutélé's to VOO, and to important reservation requests from various operators of short SMS numbers. These phenomena were no longer observed in 2024; the increase in allocations is explained by requests for geographical numbers in many areas, by new operators.

Detail handled numbering files



1.2.2. Optimal use of radio spectrum

The BIPT assigns frequency bands to operators in order to distribute the radio spectrum in an optimal fashion. Operators thus obtain rights of use to provide mobile products to the end user.

Granting rights of use. After the multi-band auction in 2022, operators continued the deployment of 5G networks in Belgium. In early 2024, with the exception of the 26 GHz band, only one 20 MHz band remained available in the 3.6 GHz band (3410-3430 MHz).

34. Business to Government (the term "government" refers to the entire public sector).
35. European Union Agency for Cybersecurity.

1. Competition and market development

The 3410-3430 MHz band. On 16 November 2023, a first call for candidates was published in the Belgian Official Gazette for the 3410-3430 MHz frequency band. Given the 100 MHz spectrum cap³⁶ (Article 4, § 3, subparagraph 1, of the Royal Decree 3600 MHz), Orange Belgium, Proximus and Telenet Group could not participate. Therefore, the BIPT has not received any applications. On 22 April 2024, a second call for candidates was published in the Belgian Official Gazette for the 3410-3430 MHz frequency band, in which the spectrum cap was this time raised to 120 MHz (Article 4, § 3, last subparagraph, of the 3600 MHz Decree). Orange Belgium and Telenet Group could therefore be candidates, but not Proximus, which owns 120 MHz given the transfer of NRB's rights. As in the first call, this second call ended without any applications. Thus, the 3410-3430 MHz band remains unsold to date.

26 GHz. For the 26 GHz band, no concrete market demand emerged from the 2019 consultation. After the 2022 multi-band auction, which grants legal certainty to operators for the next 20 years in all important mobile bands, the BIPT organised a new public consultation during the fourth quarter of 2023. It emerged that the 26 GHz ecosystem is not fully developed, but the

need for this band is expected to become more important in 2025-2030. In 2024, the BIPT worked on two proposals for a Royal Decree. A first proposal would allow part of this band to be auctioned for the provision of public services, while a second Decree would extend the existing framework to local broadband networks in the band 3800-4200 MHz to 26 GHz.

Fourth mobile operator. The fourth mobile operator (Digi-Citymesh), which acquired spectrum in the 2022 multi-band auction, only became commercially active in December 2024. Digi-Citymesh entered a national roaming agreement³⁷ and uses the Proximus network during the launch phase of its network. At the end of 2024, Digi-Citymesh applied to waive part of its rights of exclusive use in the 70/80 GHz band. These radio relay links can be used as feed links to 5G base stations.

Transmission installations in Belgium's exclusive economic zone in the North Sea. The Royal Decree of 27 February 2024 regarding the granting of user rights for the establishment and operation of transmission installations located in Belgium's exclusive economic area in the North Sea (hereinafter, "the RD") was published in the Belgian Official Gazette on 21

March 2024 (entered into force on 31 March 2024). In accordance with Article 22 of the ECA, the temporary conditions of the rights of use of North Sea networks previously granted to e-BO Enterprises N.V. Citymesh Integrator N.V. and Telenet N.V. have been brought into line with the provisions of the RD, in particular with regard to spectrum cap, duration and annual fees. For Citymesh Integrator N.V., this was the case via the [Decision of 27 August 2024](#). The [Decision of 12 November 2024](#) regularised the allocation of spectrum in the North Sea for e-BO enterprises N.V. and Telenet Group N.V.

Emergency and security services. With the arrival of 5G and the ever-increasing demand for bandwidth, a new approach has been defined. To this end, ASTRID will be able to benefit from national roaming on the networks of public operators. Moreover, ASTRID will be able to develop its own network in the 700 MHz band. In 2024, ASTRID launched negotiations with operators required to offer this national roaming in accordance with the 700 MHz RD. The BIPT determines the costs in this respect in accordance with Article 14 of 700 MHz RD. Work on this cost calculation was initiated in 2024.

5G networks in the 3800-4200 MHz band.

The Royal Decree of 4 June 2023 on private broadband radio local area networks enables the BIPT to assign frequencies in the 3800-4200 MHz band to private local area networks using the 4G or 5G technology. However, the demand for these authorisations remained very limited in 2024. The technical conditions for the use of this frequency band were laid down in the [Decision of 19 December 2023](#). In this context, the European Commission issued to CEPT on 16 December 2021 a mandate ("Mandate to CEPT on technical conditions regarding the shared use of the 3.8-4.2 GHz frequency band for terrestrial wireless broadband systems providing local-area network connectivity in the Union"). The purpose of this mandate is to study the viability of the use of the 3.8-4.2 GHz (3800-4200 MHz) frequency band by terrestrial broadband systems. The conditions arising from it must be suitable for 5G technology and protect incumbent spectrum users in the band and in adjacent bands. The final CEPT report was adopted by CEPT at the end of 2024. The BIPT expects the European Commission to finalise a decision in this regard in 2025. The technical conditions of the BIPT's Decision of 19 December 2023 will be adapted accordingly if needed.

36. The spectrum cap for a frequency band represents the maximum amount of spectrum that an operator can hold in order not to impede competition between different operators.

37. National roaming is an agreement between mobile network operators within the same country, where one operator enables its subscribers to access services using another operator's network infrastructure.

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Intelligent transport systems for road transport.

The Commission has proposed to CEPT to define harmonised technical conditions for the deployment of wider frequency channels in the 5.9 GHz (5875-5925 MHz) frequency band for safety-related applications of intelligent transport systems (ITS).

In this regard, the possibility of using 20 MHz channels in the frequency band allocated to its applications for road transport in the 5.9 GHz band is examined. Decision 2020/1426 of the Commission will then be amended accordingly.

Use of the 6425-7125 MHz band. Following WRC-2023, the RSPG established a working group responsible for developing an opinion on the future use of this band. The BIPT is in favour of activating this band also for IMT, in addition to a possible limited use by Wi-Fi. The concept of IMT family includes several mobile technologies (such as 4G, 5G and 6G). In Europe, the 6425-7125 MHz band can meet the demand for additional spectrum in the mid-band for 5G/6G, given that it has propagation conditions similar to the ones of the 3400-3800 MHz band. In a way, it is the only realistic candidate for the mid-band spectrum for IMTs. In 2024, CEPT worked extensively on the "ECC Report on the Feasibility



and sharing studies on the potential shared use of the 6425-7125 MHz frequency band between MFCN and WAS/RLAN". The BIPT assumes that there will ultimately be a band split in this band, where part of this band will be used for IMT and part of the band for Wi-Fi.

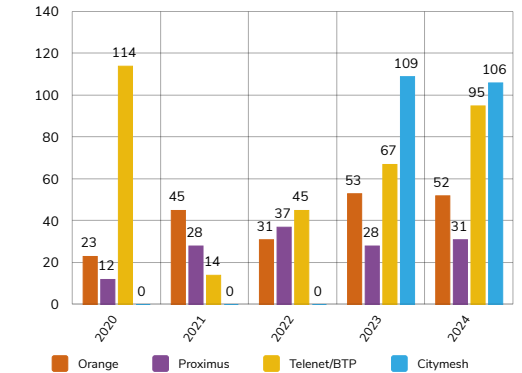
470-694 MHz UHF band. At WRC-2023, an agreement was reached on a new secondary allocation to the mobile service in the 470-694

MHz frequency band, with the exception of the aeronautical mobile service. An RSPG working group worked on a long-term plan in 2024.

Antenna site sharing. Operators have to mount their installations on existing supports as much as possible and make the masts they own available for use by the other operators. This is the reason why, before introducing a request for an urban development permit, an operator has to

sound out whether the other operators show interest in site sharing. To this end, it sends a "Letter of Intent" ("LoI") to the BIPT, which informs other operators and opens a consultation period of 30 days.

Number of Letters of Intent submitted per operator



As shown in this chart, there is an increase in the number of Letters of Intent in 2024, as in 2023, mainly due to the entry of Digi-Citymesh. Indeed, the fourth mobile operator is actively deploying its network, and sent more than a hundred LoI in 2024 to this end. Operators also accelerated the deployment of their 5G networks.

1. Competition and market development

The number of Lol does not say everything about the activities of operators: when one of them wishes to join an already existing antenna site, it does not necessarily send a Lol. If the project does not require the operator to obtain a town planning permit, the latter directly addresses a PSR (Pylon Sharing Request) to the operator who owns the support structure.

The non-profit organisation RISS ensures coordination between the operators involved. This organisation is supervised by the BIPT and supports the implementation of site sharing among operators.

1.2.3. Avoid and remedy harmful interferences

The radio spectrum is used as a support for communications: it represents a natural scarce resource which must be rationally and efficiently managed to be usefully operated. The BIPT assigns a part of it to each category of equipment using spectrum in order to limit the risk of interference to a minimum. Should interferences still occur in spite of everything, the BIPT may act as a “police of the radio waves” to put a stop to any form of harmful interference.

a) Defining the technical requirements

Radio equipment. The BIPT is in charge of issuing [technical provisions](#) for the use of radio equipment.

In this context it has published the following decisions:

- [Decision of 2 July 2024](#) on radio interfaces related to short-range devices, maritime stations, wide band audio links, intelligent transport systems and satellite earth stations.
- [Decision of 19 November 2024](#) on radio interfaces related to devices using the ultra wideband technology (UWB).

b) Putting an end to harmful interference

Monitoring actions in the field are carried out by the BIPT’s technical teams located in the regional centres of Liège, Anderlecht, Ghent and Antwerp.

To carry out this monitoring, the BIPT uses state-of-the-art equipment. Depending on the type of monitoring, use will be made of portable equipment, a measurement vehicle or the monitoring stations in the BIPT regional technical centres.

The BIPT continued the modernisation of its monitoring resources, both fixed and mobile. Seven fixed monitoring stations have thus been deployed on the territory. In 2024, these stations in Zeebrugge provided good monitoring of the maritime spectrum and those in Anderlecht, Liège, Antwerp, Ghent, Ophain and Peutie provided constant monitoring of the spectrum in general. Interconnected and usable remotely, they offer a better visualisation of the spectral occupancy, to record the spectrum for several days, to detect undesirable transmissions and to carry out an initial localisation of the transmission zone.

In addition, three new “Remote Mariphone” stations installed in Antwerp, Ghent and Zeebrugge contribute to the rapid resolution of unwanted communications on maritime channels without requiring BIPT agents to move. In this way, the coast, the Western Scheldt and the ports of Ghent and Antwerp are closely monitored. Breakdowns are now resolved by one person within an hour.

Preventive monitoring. The BIPT systematically and by way of prevention monitors the private radio communications networks when a new licence is issued (permanently or temporarily) or

when the structure of an existing network is changed. In this context it is verified whether the characteristics of the network installed correspond to what is specified on the licence (see 3.1.4.1). The objective is twofold: avoid interference and ensure that the network operator receives a correct invoice.

630 checks were carried out in 2024.

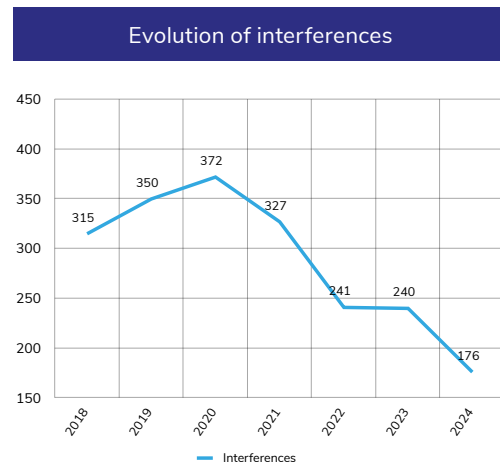
In order to be able to take measures immediately when the radio legislation is infringed, the BIPT technicians have the power to act as criminal investigation officers. In 2024, 21 official reports were drafted in the context of the spectrum monitoring and 26 interfering transmitters were seized.

Monitoring during major events. The BIPT ensures that the networks used are licensed and that the licensing terms are complied with. This guarantees an immediate solution should interferences arise. In 2024, the BIPT inspected 24 major events³⁸ and assisted its French counterpart, ANFR (Agence nationale des fréquences, or National Frequency Agency) in managing and monitoring the radio frequency spectrum in the context of the Paris 2024 Olympic and Paralympic Games.

38. Rammstein concert, Le Tour de France Femmes, Kronos 8 Hours Mettet, National UBA Congres, Tomorrowland, Legend Boucles of Bastogne, Graspop, GPF1 Francorchamps, papal visit, 24h Vélo LLN, Historic Grand Prix in Nivelles, etc.

1. Competition and market development

Resolving interferences. Governed from its headquarters in Brussels, the BIPT has four regional centres resolving interferences across the entire national territory. The total number of interference cases in 2024 amounted to 176 versus 240 in 2023.



The reduction in the number of interference cases observed in recent years is explained both by the implementation of preventive checks and by the adoption of more efficient digital technologies. Prevention also involves strengthening on-site checks, which helps to limit subsequent disruptions. The BIPT also receives fewer and

The victims and sources of interference are divided as follows:

Victims \ Source	Source														Totals	
	Not identified yet	Aeronautical	Broadcasting	Defence systems	Fixed connections	Land mobile	Maritime	Meteorology	Radio astronomy	Satellite systems (civil)	Short-range devices	Non-radio	Other	Vanished		Unknown
Not identified yet												1				1
Aeronautical	2	1	4											1		7
Broadcasting			4								1	1	1	1		8
Defence systems																0
Fixed connections	1														2	3
Land mobile	2	2				21						4	2	3	5	39
Maritime	4						21							7	4	36
Meteorology							2	1			2			2	2	9
Short-range devices			1			1				26	3	3	8	11		53
Radio astronomy																0
Satellite systems (civil)	1					1										2
Non-radio												2			1	3
Other	2									1	3	1	4	4		15
Vanished																0
Totals	12	1	11	0	0	23	23	1	0	0	30	12	8	25	30	176

fewer reports of “interferences” from operators, thanks to its information campaign on repeaters, which, by reducing the number of repeaters, has led to a decrease in disturbances.

Over 30% (53) of interference victims belong to the category “Short Range Device”; 22% (39) of victims belong to the category “Land mobile”³⁹, within which a large majority of the interferences (85%) are caused by the use of repeaters active in the frequency bands used by the mobile operators. As a reminder, this type of repeaters may only be used by mobile operators, or with their authorisation. Next come maritime services (20%) and broadcasting (5%). Aeronautical interference makes up 3.98% (7) of the total interferences.

1.3. Promotion of VHCN connectivity

Promoting connectivity and access to very high capacity networks is one of the BIPT’s goals. It is becoming increasingly evident that connectivity to efficient fixed and mobile networks is a driving force of social and economic life. The BIPT’s objective in terms of connectivity, i.e. the generalisation of access to very high capacity networks, and the uptake of such networks, for

39. Including among others the networks of mobile operators, trunk networks and PMR devices.

1. Competition and market development

all Belgian citizens and undertakings, was set in accordance with the European Code.

Connectivity Toolbox Recommendation. Taking into account the implementation of the EU Recommendation of 18 September 2020 (Connectivity Toolbox Recommendation) and Decision (EU) 2022/2481 (Digital Decade Policy Programme 2030), Belgium aims to cover all populated areas with next-generation wireless networks with performance at least equivalent to 5G by 2030. One of the challenges operators face is the realisation of 5G SA (standalone) networks. However, the regulatory framework is technologically neutral and contains no concrete obligation to provide gigabit speeds on mobile networks. In this respect, the BIPT relies mainly on competition between operators and also relies on the social responsibility of market players who benefit from digital transformation.

Gigabit Infrastructure Act (GIA). At the beginning of 2024, the BIPT supported the Permanent Representation of Belgium to the EU in its work at Council level and in the trilogue negotiations on this European legislation between the European Parliament, the European Commission and the Council of the European Union. On 29 April 2024, the GIA⁴⁰ was effectively

adopted. The GIA is a European regulation that replaces the Broadband Cost Reduction Directive (BCRD) and aims at encouraging the deployment of very high capacity networks (VHCNs) via measures that positively influence deployment speed or reduce deployment costs. During 2024, the BIPT continued its efforts to contribute to the implementation and execution of the GIA in Belgium, in support of the FPS Economy: the GIA concerns different federal and community competences. This work will be pursued in 2025.

FTTH deployment in Belgium. In 2021, the BIPT had launched the Infofibre [website](#), and had then complemented it in 2022 by a [map of optical fibre](#) showing the status and evolution of the FTTH deployment in Belgium. Since then, the map of optical fibre has been updated quarterly and shows the increase in coverage (and planned deployment) of optical fibre in our country. In 2024, the Infofibre website was extended with an additional section dedicated to the right of operators to deploy their network on the façades. Indeed, the BIPT received many questions on this subject, and this addition has clarified what is precisely described in the law, the role of the BIPT in this context, and the procedure that operators and/or owners must follow.

The Act of 21 March 1991 on the reform of certain economic public companies, the monitoring of which is partially entrusted to the BIPT, provides in Article 98, § 2, that operators may not be subject to any tax of any kind whatsoever for their use of the public domain.

The municipality of Dendermonde imposed a fee on telecommunications operators because they occupy the public domain. The telecommunications operators concerned are contesting the validity of this fee imposed on them before the Council of State and the BIPT has decided to intervene in this procedure in support of the operators who have appealed. The procedure is not yet closed.

The call for projects of the FPS Economy concerning 5G pilot projects. The call for projects aimed at drawing the public's attention to the possibilities and advantages of the 5G technology. To that end, the creation of 5G testing environments falling within the competence of federal authorities was supported. This call for projects is part of a wider programme entitled "Telecom to the next level - Towards sustainable and innovative solutions". For this call for projects, the BIPT provided experts who participated in the selection committee to support the FPS Economy.

After a first call for projects in 2022, 20 projects had been selected. A second call for projects in 2023 had aimed at distributing the remaining amount of the initial budget, with 8 projects being selected in this regard. In 2024, a third and final call enabled the selection of 10 projects. The three calls for projects have a total grant budget of €35 million.

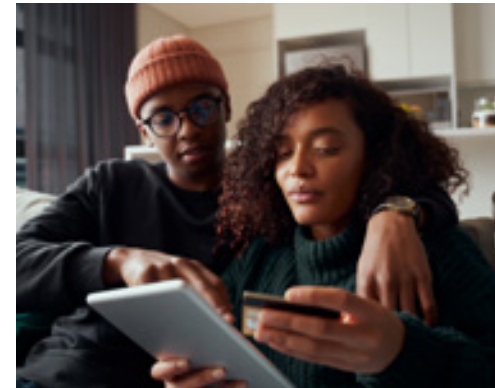
The projects had to fall under the categories "experimental development" and "research infrastructure" as defined in Regulation (EU) 651/2014.

40. Regulation 2014/2024/EU of the European Parliament and the Council of 29 April 2024 on measures to reduce the cost of deploying gigabit electronic communications networks, amending Regulation (EU) 2015/2120 and repealing Directive 2014/61/EU.



REALISATION OF OUR STRATEGIC
OBJECTIVES IN 2024

2.2. USERS' INTERESTS



2. Users' interests

Protecting the users' interests is an important mission of the BIPT. The need for them to have access to high quality postal and electronic communications services at a competitive price is well established. Ensuring social inclusion remains a key objective. But the BIPT must also ensure that users can access innovative technologies and services available on all networks. To that end, it must face the corresponding challenges, such as the protection of privacy or the conformity of equipment placed on the market.

2.1. Price studies

Telecommunications prices. In October 2024, the BIPT published a [national benchmarking on fixed and convergent service tariffs](#) based on the results of the nine profiles which were analysed during the third quarter of 2024. A second [study on mobile services](#) was published in November 2024. The results concerned the tariffs in effect in the fourth quarter of 2024. Finally, a [communication](#) was published on 11 December 2024 incorporating the latest developments observed following the arrival of the 4th operator on a particularly dynamic mobile market.

These studies take demand as their starting point, i.e. the needs that different types of telecoms service users have to satisfy. These were designed to reflect the reality of society by taking account of a wide variety of uses, from those for whom minimising expenditure is essential to consumers with larger budgets. Furthermore, the rankings show different offer and brand categories, from starter price offers to premium offers.

2. Users' interests



Five profiles refer to postpaid mobile services and 9 profiles relate to fixed and convergent services⁴¹. The comparison is based on the monitoring of the minimum expenses that informed consumers must bear to cover their

telecoms needs while specifying the different types of solutions offered by the Belgian residential market. The telecommunications solutions which were taken into account⁴² to meet the needs of each profile may include: a

standalone service (internet only or mobile postpaid), a bundle (2P, 3P or 4P) or a “mixed” solution (for instance a mobile postpaid service of an operator coupled with a bundle of the same operator A or of an operator B). For each of these 14 profiles, a ranking lists the cheapest tariff plans of operators or service providers, allowing at least to meet the specific needs.

This has several objectives: firstly, to provide visibility for all operators active on the Belgian residential market (primary, secondary and alternative brands) and, secondly, to show consumers the possible alternatives to “turnkey” solutions. These alternatives can be found by using mixed solutions, or by comparing the tariff plans offered by different operators.

The Belgian electronic communications market in an international perspective In 2024, the BIPT compared once again the prices of residential telecommunications services in Belgium with those in neighbouring countries (France, Germany, Luxembourg and the Netherlands). The study is based on the prices applicable in October 2024.

Consumers who only need mobile telephony with 1,000 call minutes and a small data

allowance up to 5 GB pay slightly more in Belgium than in neighbouring countries. For average mobile data needs, between 20 and 70 GB, Belgium is even cheap. If we consider a minimum requirement of 100 GB, our country is in the average, while for consumers with a minimum requirement of 200 GB, Belgium is the most expensive country after Germany.

In terms of fixed internet and bundles, it can be concluded, as last year, that Belgium is generally among the most expensive half of neighbouring countries, with the exception of low-need profiles. For the most comprehensive popular bundles, Belgium is by far the most expensive country.

The arrival of Digi-Citymesh on the Belgian telecommunications market is likely to cause a significant change in these results, as shown by a simulation carried out by the BIPT at the end of 2024. In the mobile market, the effect is particularly felt for the smallest data needs (up to 10 GB). On the fixed internet market, Digi-Citymesh offers are also very well positioned internationally, but they are still only available in a very small part of the Belgian territory.

⁴¹. Convergent services are telecommunications services combining fixed and mobile services.

⁴². All the plans included in the tariff simulator www.besttariff.be (consumer part) were taken into consideration to meet these different profiles. Add-ons and/or out-of-bundle consumptions were sometimes activated to meet these profiles. Depreciation is calculated over a period of three years. However, promotions were not taken into account.

2. Users' interests

2.2. Transparency and consumer protection

To ensure that users can really take advantage of a wide range of electronic communications services, and determine which one meets their specific needs and requirements in terms of quality and price, it is crucial to provide them with reliable information. By providing them with several tools, the BIPT ensures that they have transparent information at their disposal. The purpose is to ensure a reliable environment to guarantee user confidence.

Besttariff.be This site contains all tariff plans of electronic communications operators active on the Belgian residential market. It compares in an objective manner the tariffs of the offers for mobile and fixed telephony, the internet and bundles. This way, the consumer can find the most advantageous tariff plan corresponding to his or her consumption or needs. The tariff simulator offers a manual and an automated calculation option, whereby the consumption data available in the operator's customer area are automatically fed into the various fields of the tariff simulator. The BIPT constantly checks the accuracy of the data concerning the operators' tariff plans and the algorithms supporting the various functionalities.

Initially aimed at the residential market, the tariff simulator was extended in 2022 to include micro-businesses and the self-employed (manual calculation option only), to provide them with an easy way of finding an affordable telecoms subscription tailored to each business' individual needs.

As the public tender for the maintenance of this tool is coming to an end soon, new guidelines can be drawn up. In 2024, preparations were launched to this effect, which should lead to the adoption of new specifications in 2025.

Data portal. In 2024 the BIPT updated its data portal www.bipt-data.be/en. It presents data on network coverage and quality of service; this information can be useful to users when choosing an operator. This portal particularly contains detailed maps of the coverage of fixed and mobile networks, statistical indicators enabling the assessment of the quality of mobile network experience, or a table comparing performance of different providers regarding reliability, responsiveness in the event of a problem and customer service efficiency.

The portal consists of two sections (Atlas and Data). In the "Atlas" section, visitors can navigate

between fixed and mobile maps without having to re-enter their location settings. The BIPT also updated its fixed coverage maps. Information such as the technology through which the service is provided and the maximum download and upload speeds are available to inform users of the connectivity offered to their address. For mobile maps updates, the BIPT now offers 4G and 5G coverage maps.

As it has done every year since 2018, the BIPT led a campaign to measure the quality of experience on mobile networks. This campaign complements the analysis of the levels of coverage in the atlas. It focuses on the users perception regarding the quality of calls, files downloading or website browsing. It is an objective comparison of the network quality from the user point of view, based on 21 indicators. This annual "beauty contest" encourages operators to improve, highlighting the relative strengths and weaknesses of the different networks.

The study measures the experience of consumers using their smartphones inside their homes, alongside main roads, and in urban, semi-urban and rural areas. In addition, tests are also carried out on the 15 main railway lines in Belgium to measure the experience of consumers using

their smartphones aboard trains. These results are given separately for each of these 15 lines.

In order to collect more statistics on networks, additional coverage measures for Belgian railways, both inside and outside trains, have been collected since 2024 on behalf of the BIPT. The measures taken within the framework of this project started in 2024 and are also published on the data portal.

2.3. Postal Market

Comparisons of postal service points/tariffs. The BIPT's website postalpoint.be contains an overview of all staffed points, letterboxes and parcel lockers in Belgium. The tool also allows to closely monitor the development of the network. In collaboration with the postal operators subject to the Cross-Border Regulation⁴³, the BIPT has developed a method to enrich the European Commission's existing information on tariffs for national and cross-border postal items and to present it to the consumer. This pricing tool is now integrated into the www.postalpoint.be website, on which visitors can now choose, in one click, to consult the map showing the postal service points, or to compare the basic European rates for parcels weighing 2 kg.

43. [Regulation](#) (EU) 2018/644 of the European Parliament and of the Council of 18 April 2018 on cross-border parcel delivery services.

2. Users' interests

Regulation on cross-border parcel delivery services. Regulation (EU) 2018/644 of the European Parliament and the Council of 18 April 2018 on cross-border parcel delivery services aims to further support intra-Union e-commerce by increasing transparency in the tariffs for certain cross-border parcel delivery services and their assessment. The BIPT plays an essential role in achieving the objectives of the Regulation: its main task is to obtain from parcel delivery service providers the information set out in the Regulation.

In addition, based on the Regulation, the BIPT analyses the tariffs of the universal service provider (bpost) in order to identify possible unreasonably high tariffs. For 2024, the BIPT has delivered its opinion on postal parcels tariffs. However, the BIPT was still unable to take a position on letter post as bpost did not provide the requested information.

E-commerce from a postal perspective. The BIPT published a new study on the postal aspects of e-commerce, with particular emphasis on the sustainability of the last-mile delivery and a deeper review of the sub-segments of the parcel market.

Product qualification and analytical accounting. Whether or not a service falls within the universal service obligations of bpost is a question that matters for, among other things, the calculation of the universal service net cost. The list of products and services of the universal postal service provider has to be submitted for approval by the BIPT each year and per category (universal service, public service or commercial product/service). The BIPT then informs the auditor of the universal service provider of its approval. The analysis conducted in 2024 regarding the listing and classification of products and services provided by the universal service provider for the year 2023 was finalised in the Decision of 22 October 2024.

2.4. Provision of the universal service

Universal telecommunications service. In its [Communication](#) of 3 February 2025 regarding the monitoring of the universal telecommunications service in 2024, the BIPT concluded that there is no need at this stage to designate a universal service provider to ensure the availability, quality and affordability of this service as currently defined (i.e. with a minimum speed of 10 Mbps).

This communication now includes data on the number of satellite Internet connections in the country. This is in line with the principle of technological neutrality of the universal service, ensuring that all access technologies – whether fixed, mobile or satellite – are considered to ensure an adequate connection (at least 10 Mbps, and at least 30 Mbps from 2027) to consumers' main residence. This access solution could strengthen connectivity in regions where traditional infrastructure is not sufficiently present, thus helping to reduce the digital divide.

The BIPT will continue to closely follow up the development of connectivity in Belgium, review the quality parameters and monitor the development of fixed service offers as well as alternative services to fixed networks, including their prices.

The BIPT worked with the bodies involved in the social tariff reform in order to prepare the new regime, which entered into force on 1 March 2024. The BIPT has thus informed all beneficiaries of the social tariff of the existence of a new regime and of the various possible implications for them as of 1 March 2024. The BIPT also worked with the FPS Economy and the operators for the operational implementation of the reform of social tariffs.

Net cost for the provision of the universal postal service. In the event of a request for compensation of the net cost of the universal service, the BIPT verifies the assumptions used in the counterfactual scenario as well as the calculation of the net cost of bpost's universal service obligations, in accordance with Article 23 of the Postal Act of 26 January 2018. The BIPT is developing a method to verify the net cost of the universal service (comparison between the factual and counterfactual scenarios), should bpost submit a request for a state contribution to offset net costs. In this context, the BIPT, with the help of the consultant WIK consult, has also developed (and published in the form of a [Communication](#)) a method to assess the possible intangible benefits associated with the provision of the universal service. Since the entry into force of the Postal Act of 26 January 2018, bpost has not submitted any compensation request for a possible net cost of the universal service.

2.5. Follow-up of consumer needs and behaviour

The BIPT's mission to protect the users' interests involves an in-depth and daily updated knowledge of the demand on the markets

2. Users' interests



concerned. It is therefore important that the BIPT closely follows the developments of the consumers' needs and behaviours, by regularly carrying out several studies, surveys and comparisons.

2.5.1. Follow-up of the electronic communications market

Consumer study. Since 2012, the BIPT has entrusted an external consultant with the task of carrying out an annual general public survey on the users' perceptions of the functioning of the electronic communications market. This survey, carried out on a representative sample of the population, makes it possible to know the behaviour of users on the market and their knowledge of the tools made available to them to help them in their choice of services and operators, as well as to observe possible evolutions.

In 2024, the BIPT reformed its questionnaires and its survey method in order to optimise its efficiency and be adapted to market and technological developments. The objective was to be even more oriented toward the feeling of the citizen. A new public tender has been launched for a three-year period. It will be awarded and implemented from 2025.

2.5.2. Follow-up of the postal services market

Customer satisfaction survey. The BIPT monitored as every year the measurement of the satisfaction of bpost's customers, on the one hand, and the measurements of bpost's quality, on the other hand. The checks for the calendar year 2023 were carried out in 2024 and will be published on the BIPT website in the first half of 2025.

Apart from the annual monitoring carried out by the BIPT on the quality measures of bpost, an audit of these measures also takes place regularly. One of these audits was closed at the end of 2024. The results will be published in a Communication in 2025.

2. Users' interests

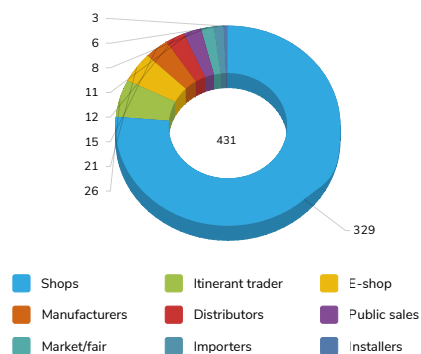
2.6. Safe radio equipment and telecommunications terminal equipment

All equipment capable of broadcasting or receiving through radio waves is subject to the **Radio Equipment Directive** or “RED”. This directive ensures that the equipment complies with the essential health and safety requirements and does not cause harmful interference. In order to improve compliance of radio equipment placed on the Belgian market, the BIPT performs regular inspections of Belgian and foreign economic operators. It also carries out border controls on imported products in collaboration with customs.

In 2024, the BIPT's radio equipment control service faced transitional difficulties as regards staffing. It operated for much of the year with only 50% of its regular staff, which resulted in a decrease in the number of inspections carried out and, consequently, in the number of reports drawn up compared to 2023.

Despite the circumstances **431 points of sales** of various distribution channels were inspected, as shown in the following chart:

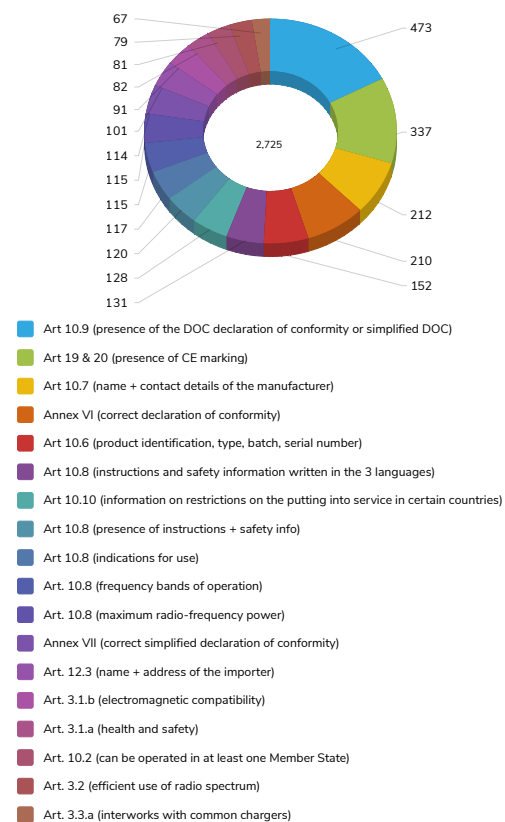
Distribution of the inspections by the EquiTel Department in 2024



A total of 972 devices were inspected in points of sale. Among them, 645 were compliant with the RED and 327 were not.

The following chart shows the main reasons for the lack of compliance.

Reasons for the lack of compliance of equipment checked in 2024



The BIPT has employees with the investigating officer status who, under the authority of the public prosecutor, can perform various investigative actions as well as searches. In this context, goods may be seized. In 2024, these actions resulted in 15 reports, for a total of 1,031 different types of products seized⁴⁴.

In cooperation with the customs authorities, the BIPT also checks radio equipment at border entry points. The BIPT was asked to check 429 containers/pallets cases and 40 parcels for private individuals in 2024.

The majority of these devices checked on containers/pallets were sent by plane, and a smaller number by boat. A total of 163,876 items were checked, among which:

- The goods of 76 cases could be released (i.e. 32,623 items);
- The goods of 353 cases (i.e. 82% of the container/pallet cases) had to be blocked because they were not compliant⁴⁵. This represented 120,750 items.

On the 40 parcels intended for private individuals and intercepted, 39 were seized.

⁴⁴. Most of the products seized were Bluetooth earbuds (30%), followed by Bluetooth amplifiers, smartphones, computers and wireless headphones.

⁴⁵. There was a serious risk in 6 cases (872 items), resulting in the destruction of goods from 4 cases (870 items). An adaptation was possible for 118 cases (48,418 items), but impossible for 229 cases (71,446 items). Goods from 231 cases were re-exported (71,462 items).



REALISATION OF OUR STRATEGIC OBJECTIVES IN 2024

2.3. DIGITAL INFRASTRUCTURE SECURITY



3. Digital infrastructure security

Digital transformation is accelerating and becoming a central pillar of the functioning of our society. While digitisation and virtualisation offer new opportunities, they also bring with them increasing complexity and new security challenges. It is therefore essential to ensure the resilience of digital infrastructures, whether networks, essential digital services or connected objects, which play an increasingly critical role in our daily lives. The reliability of electronic communications services must be guaranteed for users, including in terms of privacy. Our organisation also verifies the reliability of the information provided by the operators to users.

3.1. Electronic communications

Telecommunications networks are of crucial importance for public security and, as national critical infrastructure, require a high level of security.



Mobile network security. Given the highest importance of being able to rely on secure and reliable infrastructure, work was undertaken at the EU level with regard to securing 5G. A 5G toolbox⁴⁶ was thus published in early 2020. Its purpose is to propose solutions concerning risks linked to the cybersecurity of fifth-generation networks. Pursuant to it, the Federal Parliament had then adopted the Act of 17 February 2022 introducing additional security measures for the provision of mobile 5G services. The BIPT contributed to the draft Royal Decrees on the application for a ministerial authorisation and certain location requirements adopted in April 2023. On its website, the BIPT published the application procedure for a ministerial authorisation and the first applications were submitted in the summer of 2023. The BIPT followed up on the applications and provided the opinions requested for the establishment of decisions by the ministers concerned.

⁴⁶. CG Publication 01/2020: Cybersecurity of 5G networks EU Toolbox of risk mitigating measures. (<https://digital-strategy.ec.europa.eu/en/library/cybersecurity-5g-networks-eu-toolbox-risk-mitigating-measures>)

3. Digital infrastructure security

Risk analysis. Operators were asked to provide their risk analyses. In this context, the BIPT organised several workshops in collaboration with the operators. These workshops made it possible to define the risk analysis procedures, to offer technical support for the use of the associated tools and methodology, and to raise operators' awareness of the specific risks targeted by the risk analysis exercise.

Critical infrastructure inspection. In 2024, the BIPT conducted the annual inspection of critical infrastructure operators within the framework of the Act on the security and protection of critical infrastructures. The purpose was to analyse the security management of these operators in several domains (different each year): provider risk management, asset and change management, identity and logical access management, and security of systems. The results of these inspections are shared with the operators concerned to establish a plan to rectify the failings and improve their infrastructure security. This ongoing security improvement process is monitored by the BIPT.

Security incidents. Telecommunications operators inform the BIPT of security incidents with a considerable impact on their networks and

services. At the beginning of the year, the Institute sent the annual report of these incidents to the European Commission and ENISA (European Union Agency for Cybersecurity).

The BIPT handles security incidents via its duty service which is available 24/7. For major threats or incidents, the BIPT actively collaborates with the operators and security services, including the National Crisis Centre (NCCN) and the CCB (Centre for Cyber Security Belgium).

Regarding major incidents, the BIPT requested additional information from operators to ensure that the necessary measures are taken to prevent this kind of incident from occurring again.

Since the entry into force of the NIS2 Act on 18 October 2024, operators have notified the CCB of incidents using the form available on <https://notif.safeonweb.be/>.

Combating fraud. Within the anti-fraud working group, operators share information and experiences on a voluntary basis. Since 2016, the working group has been meeting regularly under the leadership of the BIPT, seeking collaboration at operational level (information sharing concerning types of fraud, notification of

cases of fraud...) as well as at structural level (legislative and regulatory measures).

In the context of subsidies granted within the framework of the National Recovery and Resilience Plan, the implementation of the selected operators, Proximus and Telenet, was monitored. Their AI-based algorithms to detect and block smishing fraud⁴⁷ led to the detection and blocking of 38 million fraudulent text messages in 2024. At the end of 2024, the measures taken by operators to combat calls with spoofed CLI⁴⁸ resulted in an additional 131,000 blocked/anonymised calls per day.

On the basis of the notification system, the BIPT notes a significant decrease in fraud cases in which the perpetrator uses electronic means of communication (text messages and voice) to reach the victim. Thus, the peak of IRSF⁴⁹ was reached in 2018, that of CLI spoofing in 2019 and that of smishing in 2021. The decreases are significant.

Operationalisation of the process for subjecting certain members of the operators' staff to security checks. Since May 2022, operators with critical infrastructures have been obliged to seek security advice for their staff

working in these infrastructures. The BIPT carries out the administrative management of these files and cooperates with the authorities responsible for security checks. Since the procedure was initiated, more than 50 000 cases have been handled, further enhancing the security of these critical infrastructures for the operation of electronic communications networks. Security checks, initially performed under the responsibility of the National Security Authority (NSA), are now transferred to the federal police. This transfer required a review of the procedures usually followed to adapt to the mechanisms of the federal police. Amendments to the applicable legislation have also led to the adaptation of the applicable procedures.

Risk of electricity shortage. As every year, the National Crisis Centre (NCCN) requested an update on the risks associated with a possible electricity switch-off. Analyses were carried out to ensure continued accessibility to the 101 and 112 centres. Given the limited risk of electricity switch-off during the winter of 2024-2025, no measures were imposed on the sector.

In 2024, the BIPT collaborated with various bodies to highlight the telecoms sector's dependence on the energy sector and the problems this

47. Smishing is phishing by text message, a form of fraud where the perpetrator tries to obtain information from the victim by means of a text message containing misleading information.

48. Calling Line Identification (CLI) spoofing involves calling citizens by replacing the number that appears on their terminals with a fictitious phone number or a phone number assigned to another citizen or a company. The aim is to win the callee's trust, in particular by making people believe that the call comes from Belgium.

49. The International Revenue Share Fraud is a type of fraud artificially generating telephone calls to international number series without the intention of paying for them. The perpetrator receives a portion of the revenue coming from the termination charges that the number series holder receives for incoming traffic to the number series.

3. Digital infrastructure security

creates. This exercise will serve as the basis for a long-term strategy to reduce this dependence in a cost-effective manner.

3.2. Digital sector

Guaranteeing the security of digital infrastructures in Belgium is one of the BIPT's main objectives; it is an integral part of its vision (to ensure a reliable, sustainable and competitive digital environment for everyone). In this context, the BIPT is particularly involved in the regulation and governance of artificial intelligence and actively monitors developments in post-quantum cryptography, in order to anticipate future challenges related to the security of digital infrastructures.

Artificial intelligence. The BIPT closely follows and plays an active role in discussions and work related to artificial intelligence (AI) in Belgium and at European level. It also follows developments at the level of the Council of Europe, in particular those of its Committee on Artificial Intelligence (CAI). In particular, the Institute participated in the Belgian inter-federal working group on AI, where it made proposals for a possible governance framework. The BIPT also took part in the discussions at European



level within the framework of the Artificial Intelligence Act. In 2024, the BIPT organised a general training on AI for its staff.

Quantum watch. In 2024, BIPT employees followed a specialised training and started a study on the transition to "post-quantum" encryption. The

results will give rise to recommendations in 2025.

2.4. MONITORING AND SUPPORT



REALISATION OF OUR STRATEGIC OBJECTIVES IN 2024



4. Monitoring actions and support

Monitoring compliance with the legal provisions applicable in the electronic communications, media, postal and digital markets is also part of the regulator's role. This monitoring is essential to ensure a reliable digital environment for users.

4.1. Electronic communications market

In the field of electronic communications, the BIPT organised in April 2024 a workshop to inform the sector of the priorities in terms of inspections in favour of consumers. All consumer protection provisions monitored by the BIPT will be checked for compliance between 2024 and 2026. The first inspections carried out this year concerned the Easy Switch⁵⁰ procedure, the refund of prepaid credit in the event of a number transfer, the preparation of inspections on certain obligations to provide information to operators, the waiting time to reach the customer service, and the annual [monitoring](#) of net neutrality⁵¹.



Easy Switch. The Easy Switch procedure facilitates the change of fixed internet and/or television provider, as well as the change of bundle provider: the new operator organises the change of provider, unless the user explicitly indicates that he or she does not wish this. On 1 October 2023, new obligations and amended obligations regarding Easy Switch⁵² came into force⁵³.

50. Established by the Royal Decree of 6 September 2016 regarding the migration of fixed line services and bundles in the electronic communications sector (hereinafter: the "Easy Switch RD").

51. European Regulation 2015/2120 on network neutrality.

52. These obligations were introduced by the Royal Decree of 31 August 2022 amending the Royal Decree of 6 September 2016 regarding the migration of fixed line services and bundles in the electronic communications sector. End 2022/early 2023, the BIPT and the operators met to review the new Easy Switch obligations, identify projects requiring (technical) cooperation among operators (and to launch them) and remove potential ambiguities. Following this, within the framework of the extension of Easy Switch to professional customers who took out a standard tariff plan with their donor operator, an explanatory document "BIPT Explanations and expectations on Easy Switch for B2B" was drafted.

53. These new obligations are described in detail on the BIPT website (section [consumers](#), section [operators](#) and FAQ "[What is Easy Switch?](#)")

4. Monitoring actions and support

In 2024, the BIPT checked a significant part of the adapted obligations, in particular the addition of the modified Easy Switch ID⁵⁴ on invoices and in other relevant communication channels of operators, as well as the correct functioning of the control number introduced by means of samples.

Regarding mandatory information, depending on the operator's profile, a few (dozens) sample invoices and screenshots (among others) of customer areas were requested and analysed. This was done on the brands of 22 operators⁵⁵.

The majority of operators were found to be in compliance with the monitored provisions⁵⁶. From mid-October 2024, the BIPT conclusions were sent to 9 of the 22 operators tested whose results were doubtful or negative. These letters contained (with one exception⁵⁷) a request for explanations by mid-November 2024 and/or a

question as to when measures could be taken in 2024 with regard to the indications on the invoices. In response, compliance with the provisions monitored improved positively at the end of 2024, but this does not prevent further monitoring⁵⁸, additional accompanying measures or, if necessary, sanctions to possibly follow in 2025.

With the exception of a problem with an operator with a very small clientele, the BIPT was then able to determine from a calculation formula (during the "desktop" phase of the monitoring) that the control number worked with all operators where the Easy Switch ID appeared on the invoices. From the point of view of the receiving party (and thus with regard to the functioning of the control numbers "in the field"⁵⁹), a sample from two operators, selected on the basis of notifications from the Telecommunications Ombudsman, gave rise to

very strong indications that the sales systems of one operator did not contain any measures to prevent the transmission of incorrect Easy Switch IDs to donor operators. These conclusions will be further discussed with the operator concerned in 2025.

Finally, as regards the possibility of requesting the Easy Switch ID by telephone, a form of mystery shopping was used in combination with another control⁶⁰. More specifically, BIPT inspectors called a number of times⁶¹ the customer service of the operators inspected⁶² to ask if they could get their Easy Switch ID by telephone⁶³. Statistically, good results were found in this part of the inspection: in 87% of cases, the client was properly informed. Operators with poorer results will be confronted in 2025 with the conclusions of the inspection and will be reminded of their obligations.

Waiting time to reach the customer service.

Following accessibility problems among certain operators reported in the 2023 Annual Report of the Ombudsman, priority was given in 2024 to monitoring compliance with legal requirements regarding telecommunications operators' hotlines.

Pursuant to Article 116, operators providing a hotline must answer the caller within 2.5 minutes. In case of failure, customers must be able to leave their contact details and a short message, so that the operator can contact them no later than the next working day.

Ten inspection calls were made to all mobile and fixed operators offering a standard tariff plan on the B2C and B2B markets.

Overall, the results were positive. Only less than 5% of inspection calls had a recorded waiting

54. The Easy Switch ID must now have a control number, such as bank account numbers, to avoid the transmission of incorrect codes.

55. In practical terms, the same legal person has sometimes been asked to provide samples on several occasions, for example because it owns sub-brands or has bought out operators who (currently) continue to operate on the market under a different brand/trade name. This approach is consistent with the public perception and the objectives of the monitoring.

56. This includes (1) the indication of the Easy Switch ID ("ES ID") on invoices, (2) the indication of the ES ID in the online customer area, (3) the indication of the ES ID in the operator's application and (4) the indication of the ES ID on the welcome letter, if applicable.

57. An operator, with a particular profile and providing an internet access service in Belgium via an innovative infrastructure, does not comply with any Easy Switch element (in other words, the problem is broader than the non-compliance with the monitored Articles 16 and 17 of the Easy Switch RD). Therefore, a letter was sent to him submitting an action plan to achieve full compliance with Easy Switch. Following discussions in late 2024, a plan was submitted to achieve full compliance by 1 July 2025.

58. In particular as regards compliance commitments made by the end of 2024.

59. The indication of the modified Easy Switch ID on invoices is indeed one aspect of the measure: the donor operator (operator that the subscriber leaves) must add a control number to the Easy Switch ID, based on the modulo 97 algorithm, and put this modified ID, among other things, on invoices. The other aspect of this measure is that the receiving operator also introduces into its sales systems, in the field, i.e. when acquiring new customers, functionalities that effectively prevent the entry (and transmission to the donor operators) of incorrect Easy Switch IDs.

60. See below: Waiting time to reach the customer service.

61. Without mentioning that they were BIPT inspectors.

62. This part of the inspection concerned 15 operators, the customer services of certain operators subject to Easy Switch having received requests of a different nature (apart from Easy Switch obligations), given their profile.

63. The answer to this request had to be positive, as it is introduced by Article 10, 3°, of the Royal Decree of 31 August 2022 amending the Royal Decree of 6 September 2016 regarding the migration of fixed line services and bundles in the electronic communications sector.

4. Monitoring actions and support

time exceeding the legal threshold. However, this does not automatically mean that the operators concerned were not compliant, since they still have the possibility to contact the customer again. Eight of the thirty-three operators, following a reminder of this legal obligation, will be subject to an additional follow-up monitoring exercise in 2025.

Refund of remaining credit. On 3 January 2023, Royal Decree of 30 July 2022 determining the detailed rules for applying the reimbursement of possible remaining credit within the framework of Article 11, § 7, subparagraph 6, and Article 111/2, § 1, subparagraph 5, of the Act of 13 June 2005 on electronic communications entered into force. This Decree aims to strengthen consumer rights by providing, in particular, that in the event of the portability of a mobile number to another operator, unused call credit or other assets must be reimbursed to the user, thus avoiding any unjustified financial loss.

In order to ensure the correct implementation of these new provisions, the BIPT carried out, in 2024, a campaign of systematic successive inspections of operators. These inspections concerned both the conformity of the processes

introduced, their articulation over time (deadlines, consecutive steps) and the actual granting of reimbursements.

These inspections have made it possible to analyse operators' practices thoroughly, to identify possible shortcomings and to assess the real impact on consumers. The inspection reports have been finalised and the BIPT will adopt on this basis the appropriate corrective measures or sanctions in 2025 to ensure the respect of user rights and the proper functioning of the market.

Radio equipment. The BIPT also checks the conformity of equipment placed on the market. In 2024, the BIPT continued its product verification activities, including tablets, smartphones and connected headsets, to ensure compliance with radio equipment standards. These standards are set at European level to ensure efficient use of spectrum and to protect consumers' health from the thermal effects of radio waves.

As part of its monitoring activities, the BIPT also checks refurbished smartphones that are sold on the Belgian market. The refurbishing of smartphones that were initially compliant with

the RED on the European market is generally not an issue, provided that the refurbishing process does not affect the first compliance of the product. In 2024, European discussions led to an agreement on refurbished smartphones: all Member States now recognise that smartphones imported from outside Europe, which do not comply with the RED Directive, do not become compliant after refurbishment and therefore simply cannot be placed on the European market. The refurbishing of smartphones coming from outside the European Union, such as the American or Asian markets, is therefore still subject to restrictions. These devices, which were not subject to verification pursuant to the RED, cannot be placed on the European market, refurbished or not. Furthermore, most of them do not bear the required CE marking. In 2024, as in previous years, the BIPT was confronted with several cases of non-compliant imported or refurbished products put on the market, leading to the seizure of hundreds of units.

However, discussions are still ongoing regarding the requirement for refurbished smartphones to use a USB-C charging port, a measure that could affect future marketing practices for these devices.

In addition, some essential requirements for the cybersecurity of radio equipment will be activated by a delegated regulation of the European Commission. This regulation will enter into force from 1 August 2025 (the original date having been postponed by one year to establish the technical standards). In order to control these new requirements, the BIPT has set up an IoT test laboratory, where it can examine the cybersecurity of radio equipment by disassembling the product. Through this initiative, the BIPT has further broadened the spectrum of its market surveillance activities.

Net neutrality. The [annual report](#) on the monitoring of net neutrality was published for the eighth time. This report relates the monitoring of compliance with Regulation (EU) 2015/2120. It covers the period from 1 May 2023 to 30 April 2024. The document reported, among other things, the conclusion of its [Decision of 26 September 2023](#), which in practice allows the free choice of modem/router/CPE from 1 November 2024. In addition, the BIPT advised an operator on how to provide a specialised service in accordance with the regulation on open internet access without compromising the overall quality of internet access services. The application of other

4. Monitoring actions and support

exceptions to the principle of equal treatment of internet traffic, such as the exception allowing traffic to be blocked in the event of virus attacks, has also been given due consideration, as have consultations with the sector and BEREC to coordinate the blocking of websites of broadcasters belonging to the Russian regime sanctioned by the EU.

The BIPT has also ensured compliance with its [Decision of 2 May 2017](#) regarding the communication of the speed of a fixed or mobile broadband connection as follows:

- The BIPT corrected, after a formal notice, the way in which an ISP⁶⁴ that entered the “fixed” internet market presented the speeds of its new products in the contract summaries;
- The BIPT carried out a targeted check at seven other ISPs at the same time, resulting in the correction of the shortcomings found, mainly with regard to the indication and formulation of remedies in the event of insufficient Internet access service speed and absence of a date in the contractual summary.

Transparency requirements were also monitored within the framework of the provision of “unlimited internet” following a parliamentary question.

Overall, the BIPT considers that there are no major reasons to worry so far in Belgium in the field of access to an open internet: no cases of unacceptable blocking of services or applications in the network have been noted and, since 1 November 2024, end-customers have been able to use their own modem.

4.2. Postal Market

Implementation of the Parcel Act (also known as “SoPlaFi” – short for “social level playing field”). Within the framework of the implementation of the Act of 17 December 2023 which aims to improve the working conditions of

parcel deliverers, the BIPT has set the practical modalities for the notification and half-yearly reporting with its decisions of 16 April 2024 and 8 October 2024. As the BIPT was responsible for monitoring these two obligations, it was also responsible for answering questions from the sector about them, and for collaborating with the other administrations concerned (NSSO, FPS Economy, FPS ELSD⁶⁵). A list of companies in notification order, indicating any sanctions imposed by all authorities, has been published quarterly. The first list was published on 2 July 2024. As part of the monitoring of these obligations, the BIPT has sent numerous reminders and given notice to certain companies.



Royal Decree on sustainability indicators. The Royal Decree of 14 December 2023 (on sustainability) amending the Royal Decree of 14 March 2022 was published in the Belgian Official Gazette at the end of 2023. Postal service providers (with at least 250 workers in the past year, including subcontractors and temporary workers) in the parcel delivery segment must thus collect certain information in the context of sustainability. For the first two indicators of Article 8/1, § 1, subparagraph 1, 1° and 2°, of this Royal Decree (average emissions in CO2 equivalents throughout the chain as well as specifically for the distribution phase), the BIPT had to define a methodology.

During the process of developing this methodology, throughout 2024, postal service providers were closely involved, with a final [public consultation](#) (from 22 October to 26 November 2024). The objective pursued by the BIPT was to present a concrete methodology to postal service providers that was at the same time compliant with international standards and reasonable (a minimal “administrative burden”), but also capable of providing sufficiently precise and comparable results with one another and over time.

⁶⁴ Internet service provider.

⁶⁵ FPS Employment, Labour and Social Dialogue.

⁶⁶ The small user basket includes services that are frequently used by private persons and SMEs and to which single-piece rates apply (prices are not influenced by the number of items deposited or by the postal preparation thereof), namely: domestic standard letter post and standard outgoing cross-border mail weighing 2 kg or less; outgoing domestic and cross-border postal parcels up until 10 kg, registered items and outgoing domestic and cross-border items with declared value.

4. Monitoring actions and support

The BIPT is also tasked with monitoring compliance with the Act of 26 January 2018 on postal services.

bpost prices. The monitoring mission of the BIPT also includes the important task of monitoring bpost's annual tariff increases for small users⁶⁶ (postal products intended for private individuals and small professional users who do not have reduced tariffs for bulk products).

As already stated in its [Opinion](#) of 19 October 2017, the BIPT considers that the new price cap formula of the Postal Act, revised in 2018, as set out in the Postal Act, does not allow to ensure effective control of the principle of cost orientation. Volume changes, which are the basis of the price cap formula, are only indirectly linked to costs. It is also questionable whether this formula can adequately check the affordability of tariffs, given the large gap between inflation and the tariff increase applied by bpost since 2018 and the increase requested for 2025.

As regards the tariff increases of 2025 for these services, the BIPT could therefore only acknowledge the fact that the average tariff increase of maximum 6.06% requested by bpost

(in addition to previous price increases, such as the +7.24% average in 2024) complies with the legal provision concerned, that allows increases up to 30% on average, without being able to assess the cost orientation separately, despite the high and constantly increasing margin regarding the small user basket ([25-35]% in 2023).

In its [comparative study](#) on a European scale published in 2024, the BIPT also highlighted the problem of price control, based on a regression model that predicts tariffs according to the characteristics of a country (such as volume per capita, size of the country, population density, wage costs, etc.). Given these parameters, a significantly lower tariff could be expected for the prior stamp in Belgium. With regard to the non-prior stamp, there is also a clear difference between the expected tariff and the actual tariff, but this difference is not yet significant. Within this framework, the BIPT will pursue its efforts towards harmonisation of the legislation on postal tariffs with the European legislation.

Delivery times. The BIPT also published the [results of the measurements carried out by bpost within the framework of the 6th management contract](#). The audit of bpost

measurement systems used to measure the quality of delivery times (for priority domestic items, non-priority domestic items, domestic registered items and domestic single piece postal parcels) was carried out in 2024. The results of this audit will be available in the first quarter of 2025.

Cross-border parcel delivery. The BIPT must also ensure the implementation of Regulation EU 2018/644 of 18 April 2018 on cross-border parcel delivery services. This includes several action points. On the one hand, the introduction of the tariffs by the operators was supervised and verified by the BIPT. On the other hand, cross-border statistics were also collected. Finally, bpost's considered tariffs were evaluated.

4.3. Digital sector

4.3.1. The Digital Service Act (DSA)

The Digital Services Act, or "DSA", has been in force since 17 February 2024. This regulation establishes harmonised rules at European level to ensure a safe, predictable and reliable online environment for users of intermediary services such as online platforms.

In Belgium, four authorities monitor the application of the DSA: the BIPT, the CSA, the Medienrat and the VRM. The cooperation agreement of 3 May 2024 defines the respective missions of these competent authorities and designates the BIPT as the Digital Services Coordinator ("DSC") for Belgium. This agreement also lays down the rules applicable to their cooperation. The BIPT, which is already the regulator of electronic communications and postal services, sees its competences broadened, thus strengthening its role in protecting Belgian consumers against the challenges of the digital world.

In this context, the BIPT's task to enforce this regulation in Belgium is twofold: it ensures national coordination and is the Belgian single point of contact, and this while carrying out its duties as a competent authority.

Since the entry into force of the DSA (and its designation as a CA), the BIPT has undertaken several major actions to continue preparing for its application. These actions involved collaboration with the CAs, the organisation of workshops and meetings with administrative and judicial authorities and potential trusted flaggers. Moreover, the BIPT also handled user

4. Monitoring actions and support



complaints, particularly regarding the Telegram platform, and actively participated in the European Board for Digital Services and its eight working groups. Their mission aims at improving and harmonising DSA implementation practices across the Union.

In addition, the BIPT prepared for potential actions regarding the preservation of the integrity of electoral processes, among other things by participating in a “tabletop exercise on elections” with the European Commission and the DSCs of the Member States. It has strengthened its contacts with the FPS Home Affairs and the National Crisis Center. It also discussed with online platforms and search engines (including Google and X).

In order to ensure effective national coordination, in particular with regard to the follow-up of ongoing dossiers (in real time) and decisions taken, Article 5 of the cooperation agreement between the BIPT, the CSA, the Medienrat and the VRM provides for the establishment of a common information-sharing system.

The first step in this development was to define the internal processes for the various DSA themes, such as the handling of complaints,

upcoming certification requests, etc. This phase enabled the identification of functional and operational needs. In 2025, these processes need to be refined in order to translate them effectively into IT solutions, which is an essential step to ensure a system that is efficient and adapted to national coordination requirements.

For more information on the main tasks carried out, the BIPT has also published an annual report presenting its activities and those of the CAs within the framework of the DSA during the year 2024 (from 17 February to 31 December).

4.3.2. The implementation of the Terrorist Content Online Regulation

Since 21 December 2023, the BIPT has been one of the Belgian authorities responsible for the implementation of Regulation (EU) 2021/784 of 29 April 2021 on addressing the dissemination of terrorist content online (hereinafter: the “Terrorist Content Online” or “TCO” regulation). The other competent Belgian authority is the Federal Prosecutor’s Office.

The TCO Regulation has been directly applicable in all EU Member States since 7 June 2022. This

4. Monitoring actions and support

regulation lays down harmonised rules at EU level to ensure that hosting service providers, which make user content available to the public, address the misuse of their services for the dissemination to the public of terrorist content.

The Federal Prosecutor's Office is responsible for issuing orders against hosting service providers to remove terrorist content or disable access thereto. It may also scrutinise cross-border removal orders issued by the competent authorities of other Member States in order to verify that they do not seriously or manifestly infringe the TCO Regulation or fundamental rights and freedoms.

The BIPT is competent to impose sanctions on a hosting service provider in case of a breach of obligations laid down by the TCO Regulation, such as the removal of terrorist content or the disabling of access thereto, but also other obligations, such as publishing an annual transparency report, informing the person whose content has been blocked or disabled, or reporting to the competent authorities any terrorist content involving an imminent threat to life.

Hosting service providers designated by the BIPT as "exposed to terrorist content" also have

additional obligations. When a hosting service provider is designated as such, it is required to take specific measures to protect its services against the dissemination of terrorist content. The BIPT is then responsible for supervising the implementation of these specific measures by the hosting service provider.

If a hosting service provider fails to meet its obligations, the BIPT may impose a financial penalty (penalty payment, fine) of up to 4% of its global turnover.

In order to implement the TCO Regulation in the most efficient way possible, the BIPT is closely cooperating at national level, with the Federal Prosecutor's Office and the Federal Police, and at European level, with the competent authorities of the other Member States, the European Commission and Europol (which makes available the PERCI platform facilitating exchanges between competent authorities and hosting service providers within the framework of the TCO Regulation).

For the year 2024, the BIPT was informed of 93 orders issued by the Belgian Federal Police regarding hosting service providers established in Belgium or which have a legal representative

in Belgium and abroad. The BIPT has also received communication of 454 cross-border orders relating entirely to content provided through the hosting services of Telegram Messenger Inc. (hereinafter: "Telegram"), a company established in the British Virgin Islands having appointed its legal representative for the European Union for the purposes of the TCO Regulation in Brussels.

Given the significant number of Telegram users and the number of orders issued against it, the BIPT undertook in 2024 a thorough examination of Telegram's compliance with the obligations laid down in the TCO Regulation. The BIPT will

continue this exercise in 2025 and will extend its monitoring to other hosting service providers under its jurisdiction.

In 2025, the BIPT will consider designating hosting service providers as "exposed to terrorist content online" (Art. 5 of the TCO Regulation).

In order to ensure uniform application of this European regulation, the BIPT regularly consults with the competent authorities of the other Member States and participates in the relevant workshops organised by the European Commission or financed by the European Union on the subject.





REALISATION OF OUR STRATEGIC OBJECTIVES IN 2024

2.5. EFFICIENT FUNCTIONING



5. Efficient functioning

The BIPT wishes to be an accessible regulator who, as an attractive employer, draws capable personnel. That is why it is pursuing its efforts to create a modern and efficient work environment by taking action regarding digitisation, organisation management and internal monitoring. In the context of its activities, the BIPT also takes into account sustainability factors and the impact on its environment.

5.1. Accessible and future-oriented operation

5.1.1. Simplified administrative file handling

Social tariffs. The BIPT is responsible for the annual verification of the granting conditions in order to verify that the beneficiaries of the former regime social tariff still fulfil the conditions allowing them to benefit from the reduction.

The new social tariff regime (social internet offer), which entered into force on 1 March 2024, is managed by the FPS Economy.

As regards the monitoring of the granting

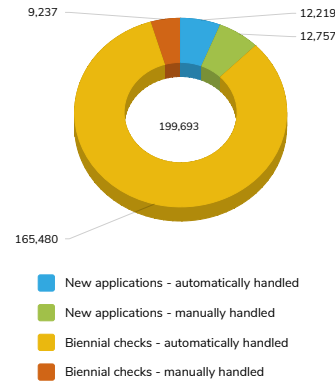


conditions for the former regime electronic communications social tariff, the BIPT uses a beneficiary database called "STTS", which enables an automated (partial) check of the granting conditions.

In 2024, about 25,000 new requests introduced before 1 March 2024 and about 175,000 yearly verifications were processed in this manner. This was mostly done automatically.

5. Efficient functioning

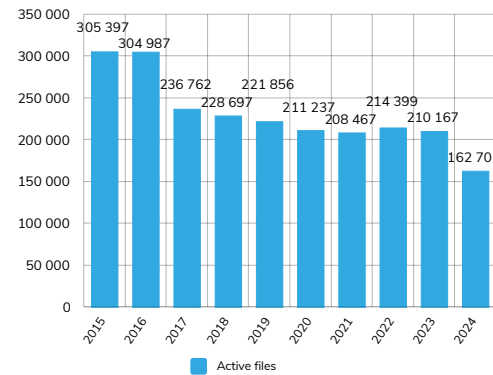
Social tariff files handled in 2024



Since no more applications can be entered for the former regime social tariff as of 1 March 2024, the number of files is bound to decrease.

Since 1 March 2024, the BIPT has solely been focusing on verifying the social tariffs previously granted.

Active social tariff files in 2024



5.1.2. Handling of complaints regarding the functioning of the BIPT

The BIPT attaches great importance to the quality of its service, based on its values (independence, reliability, transparency). The complaints manager can rely on all operational departments to provide an appropriate and rapid response to messages received on the dedicated e-mail address. Analysing these contacts helps to sort out simple dissatisfactions and complaints against poor performance by the BIPT, locate

the source of gaps, failures or shortcomings in the documents, processes or resources deployed, and draw lessons from the editorial, procedural or organisational aspects.

In 2024, the complaint manager appraised and monitored 18 admissible complaints, over a total of 119 messages received. The number of admissible complaints remains rather low, particularly when compared with the large volume of interactions (e-mails, letters, telephone calls, visits, etc.) between the BIPT and its “customers”. For BIPT employees, this figure reflects their daily commitment to the quality and satisfaction of their interlocutors.

In 2024, pursuant to a cooperation agreement between the BIPT and the Federal Ombudsman (who may be called upon to examine a case under a cooperation agreement), the ombudsman closed one case (one unfounded complaint).

5.2. Competent staff

Personnel. By the end of 2024, the BIPT had 251 staff members: 239 statutory agents and 12 contractual agents. These staffs are detailed in the Annex. This figure represents 242.2 full-time equivalents. Among them, 12 staff members (11.6 FTEs) were put at the disposal of

the Office of the Ombudsman for the Postal Sector and 17 staff members (16.3 FTEs) were put at the disposal of the Office of the Ombudsman for Telecommunications. Their duty is to assist the ombudsmen in handling complaints of consumers in their respective sector.

In 2024, the BIPT hired 17 new staff members at different levels and with various profiles: Three engineers-advisors, three advisors (of which one for the Office of the Ombudsman for Telecommunications), nine administrative employees (of which one for the Office of the Ombudsman for Telecommunications) and two technical employees. Within the BIPT, two administrative employees were promoted to the rank of administrative head of department.

As the validity period of the linguistic framework of the BIPT was expiring during the year, the necessary data were collected internally for the purposes of a new Royal Decree establishing the linguistic framework of the BIPT. The Standing Committee for Language Supervision issued a favourable opinion concerning the slight shift in the linguistic percentage in the central services, for which the ratio is currently 55.95% NL compared to 44.04% FR. For Members of the Council, the ratio is 50% NL-50% FR.

5. Efficient functioning



Well-being. Since the BIPT moved to a building (the Allianz Tower) on the other side of the Boulevard du Roi Albert II in December 2024, its personnel has now been working in modern, landscaped offices where attention has been paid not only to providing enough “focus rooms”, but also to common areas and a multipurpose room where colleagues can meet. Particular attention was also paid to ergonomics of the furniture during the move.

Training. Continuous staff training is an integral part of the BIPT’s policy. Training courses are open to all staff members, regardless of their profile and cover all types of skills required for the performance of their duties.

In 2024, two major actions deserve to be highlighted:

- An “introduction to artificial intelligence” training. It was prepared internally and all BIPT members were invited. Its purpose was to provide an overview of AI-related issues. It was followed by half of the BIPT staff members;
- An Investigating Officer training: about 30% of the BIPT staff members have the Investigating Officer status. They must be trained to perform their duties properly. The

Investigating Officer status is also obtained following the successful completion of an examination subsequent to their training. The training organised in 2024 trained more than 30 new Investigating Officers.

Various specific training courses for NetSec service engineers and inspection service technicians are also worth mentioning, as well as training in the reporting software (Power Bi) for the benefit of its users.

Furthermore, the Training Department continued its activities, which are now well established at the BIPT: encouraging people to master the second national language through the language plan, organising training courses based on legal obligations (such as first aid and evacuation procedures), organising internal workshops, analysing training needs for specific profiles (such as new advisors and engineers-advisors), analysing individual training needs, attending conferences, etc.

Taking all types of training together, the average number of training days attended per full-time equivalent was 2.9 in 2024⁶⁷.

Integrity. As was the case in the previous years,

the 2024 internal operational plan includes a chapter dedicated to awareness-raising of the BIPT staff as regards integrity and the accompanying risks. The 2024-2026 integrity policy was developed with the various players involved in integrity. The whole organisation was informed via a workshop on the integrity policy and points of action resulting from it. It is also available on the Intranet website. The implementation of these action points was monitored after the first and second half of 2024. These included the creation of a mind map of our values, an article on harassment in the internal newsletter, the internal reporting on integrity data, the mention of our values in the swearing-in, additional actions based on the analysis of integrity risks by function, and the award of the personnel management department internal audit. In addition, staff members are continuously made aware of the attention to be paid to the processing of personal data and information security.

67. This statistic covers most of the training activity. However, it excludes the following of certain seminars and online training, the time spent on personal study and other additional activities.



Belgian Institute
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CHAPTER 3. 2024 IN NUMBERS



1. Electronic communications

1.1. Indicators of the electronic communications market

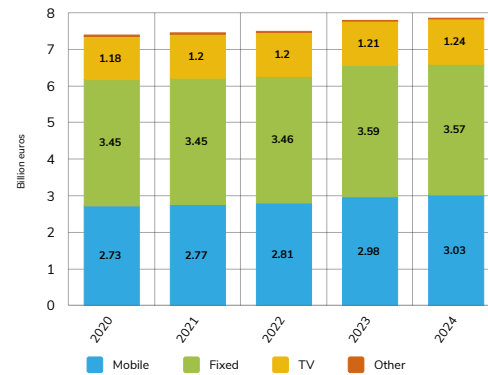
Each year, by the end of June at the latest, the BIPT publishes the electronic communications sector's statistical report. This part discusses the main trends observed in this sector in 2024.

1.1.1. Turnover and investments

In 2024, the electronic communications and TV market⁶⁸ yielded an external net turnover⁶⁹ of €8.64 billion, or a €6,97 million decrease (-0.1%) compared to 2023.

The turnover on the retail market increased by 0.7% to €7.77 billion. The fixed segment decreased by €17.15 million, down 0.5% to €3.57 billion. The mobile segment, on the other hand, grew by €47.6 million, up 1.6% to €3.02 billion. Television services also contributed positively to the turnover growth, increasing by €22.94 million to €1.24 billion.

Breakdown of retail turnover for electronic communications and television

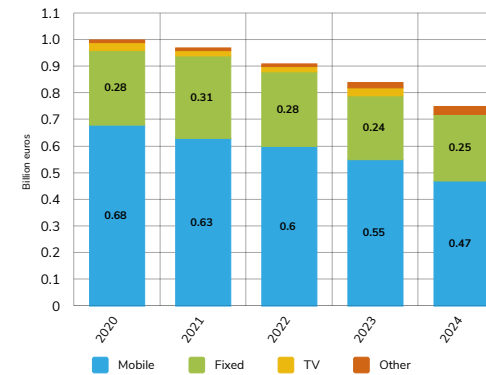


The turnover on the wholesale market dropped by 4.5% to €0.78 billion due to the loss of turnover on the mobile (-€43.02 million) and television (-€22.27 million) markets. The decrease in the mobile market is mainly due to a decrease in revenue from remuneration that operators charge one another for:

- The termination of a call or SMS on their network;
- The use of mobile voice, SMS or data services in Belgium by subscribers of foreign mobile networks (incoming roaming).

On the television market, the decrease is linked to the takeover of VOO by Orange⁷⁰.

Breakdown of wholesale turnover for electronic communications and television



On an annual basis, investments in the telecommunications and television sector increased by €117.77 million to a total of €2.74 billion (+4.5%), excluding license fees and broadcasting rights. This increase is higher than in 2023 (+€99.4 million), but remains significantly lower than the strong increase of €605.1 million recorded in 2022.

The deployment of gigabit networks, both over

fibre and DOCSIS technology over the coaxial network, is a key driver of increased investment in the fixed telecommunications segment. These investments increased by €127.51 million to a total of €1.71 billion. Investments in the mobile segment also increased by €67.72 million to a total of €460 million, partly due to the deployment of 5G technology.

The television segment saw a decline in investment for the second consecutive year, with a decrease of €3.9 million in 2024 to €110 million.

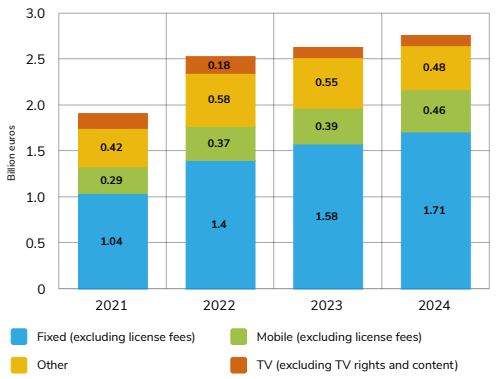
68. Based on contributions from Proximus SA (including Scarlet), BT Limited, Colt Telecom, Eurofiber, Orange, VOO, Canal+, Lycamobile, Mobile Vikings, Telenet Group Holding (including Wyre) and Verizon.

69. The concept of external turnover refers to income generated by sales to third parties that are not part of the same enterprise; internal sales within a vertically integrated enterprise and sales between entities within the same enterprise are excluded.

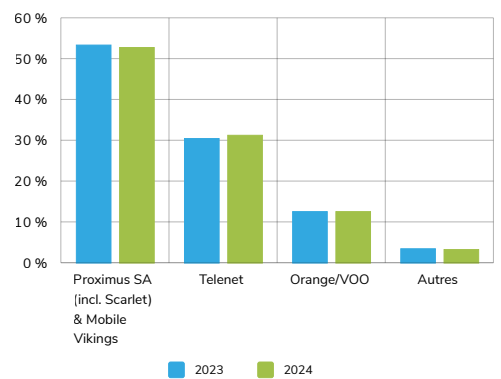
70. As a result, the sale of VOO to Orange is no longer considered as an external turnover but as a sale between entities within the same company.

1. Electronic communications

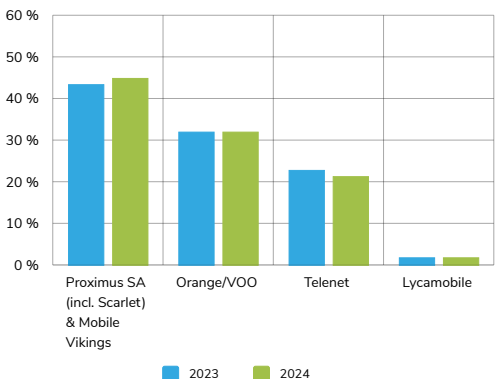
Breakdown of investment in electronic communications



Market shares in terms of external turnover - fixed electronic communications



Market shares in terms of external turnover - mobile market



1.1.2. Market players

In the fixed products segment, only Telenet Group Holding⁷¹ recorded revenue growth, which translates into an increase in market share of 0.8 percentage point to a level between 30% and 40%. Proximus SA (including Scarlet) and Mobile Vikings – hereinafter referred to as Proximus – lose together 0.6 percentage points, while Orange/VOO’s market share remains stable.

Proximus and Orange/VOO strengthen their position on the Belgian mobile market, with an increase in turnover and market share of 1.5 and 0.1 percentage points respectively. Proximus remains the market leader with a market share between 40% and 50%, followed by Orange with a market share between 20% and 30%. Telenet also maintains a market share between 20% and 30%, but its performance deteriorates, with a decrease in turnover and a loss of 1.5 percentage point of market share.

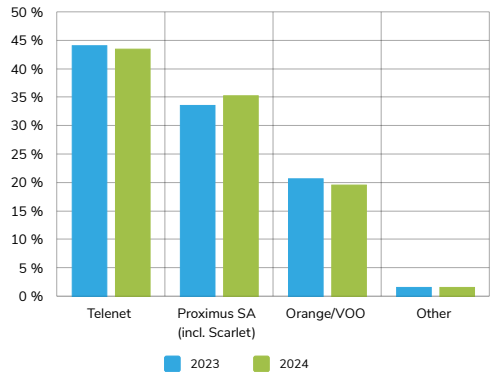
On the national television market, Telenet’s loss of turnover translates into a 0.6 percentage point decrease in market share, which is therefore between 40% and 50%.

Orange/VOO’s market share is simultaneously shifting from the 20-30% category to the lower 10-20% category, mainly as a result of Orange’s takeover of VOO.

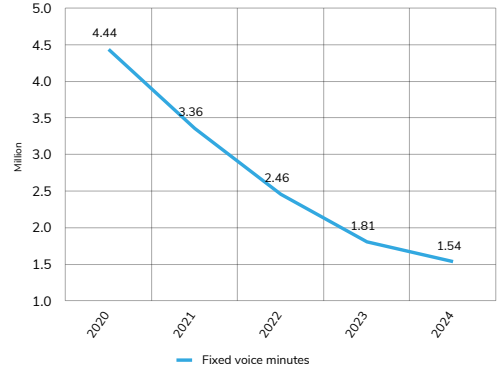
71. Telenet and Wyre

1. Electronic communications

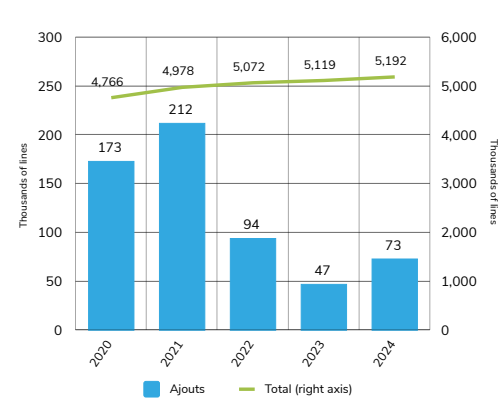
Market shares in terms of external turnover - television



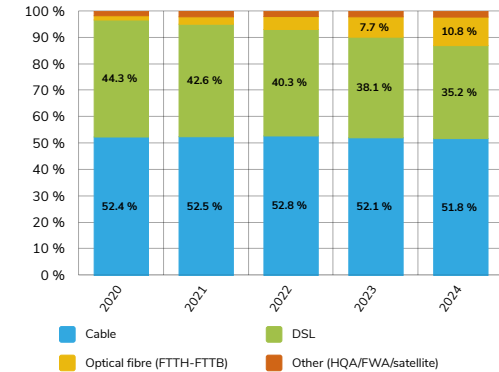
Call minutes over fixed networks from 2020 to 2024



Annual net additions of fixed broadband lines from 2020 to 2024 and number of fixed broadband lines in 2024



Fixed broadband lines per technology, from 2020 to 2024



1.1.3. Fixed services (voice - broadband)

The use of fixed telephony continues to decline steadily. In 2023, the number of fixed telephony network connections dropped by 9.5% to 1.85 million. As a result, the percentage of households with a fixed line fell from 40% to 36%. Calls to fixed lines also fell: the number of minutes in the residential market fell by 14.9% to 1.54 billion.

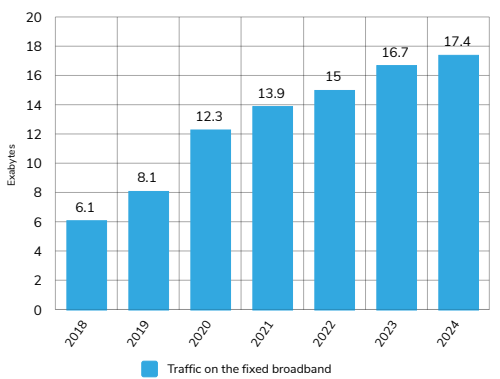
In 2024, the number of fixed broadband connections grew further in Belgium, rising by +1.4% to 5.19 million. Compared to 2023, net growth is 73,000 lines on an annual basis.

At the end of 2024, fibre connections accounted for around 11% (+3.1 percentage points on an annual basis) of all broadband internet lines sold in Belgium, both for individuals and businesses. By comparison, the share was only 1.6% in 2020. This increase is mainly due to the gradual replacement of DSL lines via copper networks. Copper's share of the total number of fixed broadband connections decreased from 44.3% to 35.2% over the same period. On the other hand, the share of Internet connections via coaxial lines (cable lines) remained almost stable at around 52%.

In 2024, fixed broadband traffic increased by 11% to reach 16.7 exabytes. On average, 278 GB were consumed per fixed broadband line per month, i.e. 17 GB more than in 2023.

1. Electronic communications

Fixed broadband traffic in exabytes⁷² from 2018 to 2024



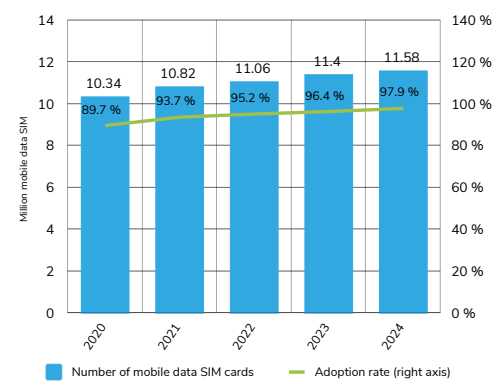
1.1.4. Mobile services

The number of active SIM cards on the mobile market, excluding M2M cards, reached 12.71 units, i.e. a 0.2% increase compared to the end of 2023.

The popularity of the Internet of Things (IoT) has led to an increase in the number of connected devices and sensors to exchange data. At the end of 2024, 9.06 million IoT objects were connected, i.e. a 21% increase.

In 2024, there were 97.9 active data SIM cards per 100 inhabitants in Belgium, i.e. a total of 11.58 million cards (+1.6%). More and more data SIM cards are using 5G connectivity. At the end of 2024, 40% of active data SIM cards generate 5G traffic, up from 27.4% a year earlier.

Number of mobile data SIM cards and take-up rate by the population from 2020 to 2024



Mobile data traffic continues to grow significantly year over year. In 2024, the number of GB of mobile data consumed amounted to no less than 1,318 million, a considerable increase from the 983 million GB consumed in 2023.

The average monthly consumption volume per active data SIM card increased from 7.6 to 9.5 GB.

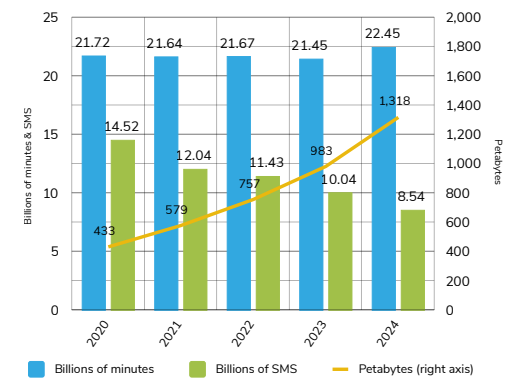


Although mobile data is becoming an increasingly important part of our communication habits, traditional mobile telephony retains its place in everyday use. After a decline in mobile voice traffic in 2023 (-1%), 2024 saw a new increase:

+4.7% for a total of 22.45 billion minutes. With an average of 147 minutes per active SIM card per month, usage is back to its level two years ago.

However, the number of SMS sent continues to decrease steadily, by -14.9% to reach 9.89 billion.

Evolution of traffic over mobile networks from 2020 to 2024



72. One exabyte equals 1 billion gigabytes (GB)

1. Electronic communications

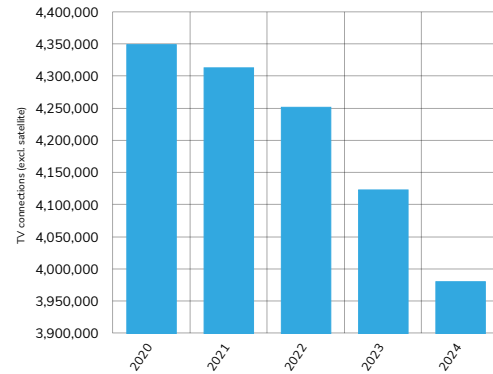
1.1.5. Television

The decrease in the total number of TV connections is accelerating: -142,804 for a total of 3.98 million connections in 2024 compared to -128,625 in 2023 and -61,377 in 2022.

Although the number of TV connections for customers of telecommunications operators who watch television solely via the internet increased (from 104 309 to 118 013), this did not offset the fall in the number of traditional television connections (-156 508).



Evolution of the number of connections from 2020 to 2024



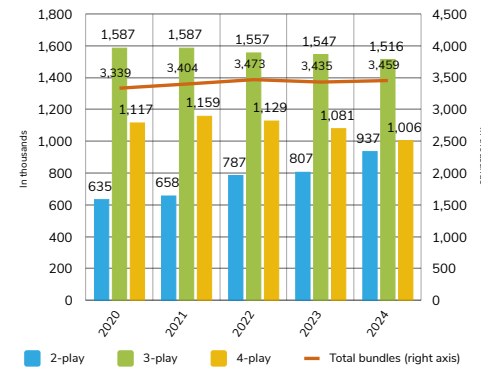
1.1.6. Bundles

In 2024, multiple play, i.e. subscribing to several services within a single subscription, saw an increase of 24,302 additional bundles. This increase follows the one-off decrease of 2023 (-38,383) and brings the total number of bundles to 3.46 million.

Only double play made a positive contribution (+130,582 to 0.94 million) to the growth of multiple play. Triple-play bundles decreased by

31,364 to 1.52 million, but remains the second largest x-play formula despite this decrease, after quadruple-play bundles with 1 million.

Distribution of fixed residential bundles

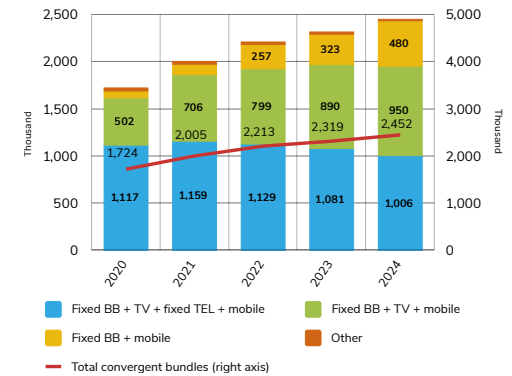


Convergent bundles including fixed and mobile services continue to grow, increasing by 133 092 units to 2.45 million units. In the total of bundles, they account for a market share of 70.9%, i.e. an increase by 3.4 percentage points compared to the previous year.

The bundle combining fixed broadband, TV and

mobile telephony is clearly gaining popularity with an increase of 59,746 connections to 950,155. However, the largest increase is observed in bundles combining fixed and mobile broadband, with an increase of 156,451 to 479,556. This indicates a shift in consumption patterns: more and more consumers are abandoning traditional TV and opting for fixed and mobile broadband only.

Combinations of convergent bundles



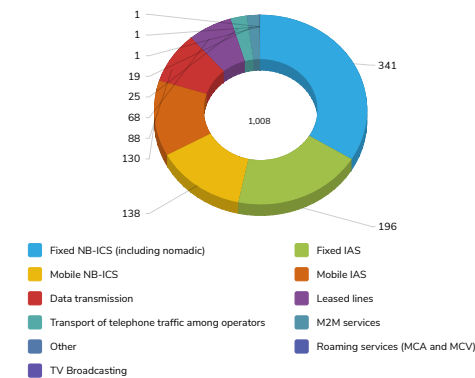
1. Electronic communications

1.2. Notifications

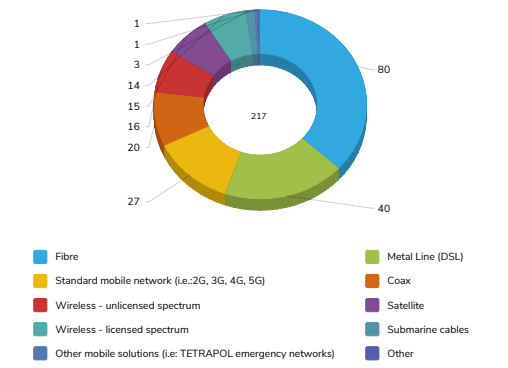
Access to the electronic communications market is free. A newcomer on the market can start its activities following a simple notification to the BIPT. A [vade mecum](#) published on the BIPT website facilitates their entry onto the market.

At the end of 2024, there were 522 operators and their notifications concerned the following services and networks:

Distribution of electronic communications services



Distribution of electronic communications networks



1.3. Networks

Fixed. Because of the density of their infrastructure, Proximus, Wyre (used by Telenet among others) and Orange (taken over from VOO) are the operators with the largest national coverage in terms of fixed networks. While Orange and Proximus offer their services to both the general public and businesses, Wyre offers its network to other operators, including the coaxial network used by Telenet. Tariff plans for the residential market and small companies can be compared in the [besttariff.be](#) simulator.

Operators with a more limited network coverage can use the infrastructure of bigger operators to provide their services to their own customers, both private and non residential. This is “wholesale” access. Examples are Orange, which uses Wyre’s cable to launch its own fixed internet/digital TV tariff plans on the residential market in Flanders and in some municipalities in Brussels where it does not have its own network; and Yoin, which has access to Proximus’ fibre and DSL network to provide fixed communication solutions. The BIPT plays a crucial role in such wholesale access.

Mobile. As regards the mobile network operators, Proximus, Telenet Group and Orange have deployed their own networks. They are the Mobile Network Operators or MNOs. A new operator is actively developing its new radio access network, Digi-Citymesh, which, before launching its own access network, is using the Proximus access network.

MVNOs (Mobile Virtual Network Operators) are mobile service providers who do not have their own mobile network. The most advanced MVNOs (known as Full MVNOs) do have their own fixed network assets, but not their own radio access network. There are also light

MVNOs which operate their own customer management and billing system. Examples in this category are Yoin, Mega, and Undo.

1.4. Licences, examinations and certificates

The BIPT is responsible for the management and monitoring of the radio spectrum in Belgium. The BIPT assigns frequencies and issues licences for the “radio users”, i.e. the “operators” who have obtained rights of use for public radio communications, or the required authorisations for private radio communications.

As regards the use of private radio communications stations, the BIPT’s activities include the granting of licences and the organisation of examinations.

1.4.1. Licence granting

The BIPT issues licences for the use of private radio networks and individual radio stations. Based on those licences it is possible to verify whether the network is appropriately licensed upon inspection.

Licensed radio stations and networks are subdivided into categories, depending on their destination

1. Electronic communications

and the manner in which they operate⁷³:

- 1st category: private mobile radio communications networks, except for those falling under category 3. These include private mobile radio communications networks mostly used for professional ends, for instance by taxi companies, factories, etc. (permanent licence) or at construction sites, events, etc. (temporary licence);
- 2nd category: private fixed radio communications networks. These refer to radio relay links⁷⁴;
- 3rd category: mobile radio networks set up by governmental bodies, companies active in transportation by railways and public transport companies, hospitals and bodies for medical or social help for strictly humanitarian and non-profit purposes. This category covers the same use as category 1 licences, only the licence holder has a different capacity;
- 4th category: licences for maritime radio stations;
- 5th category: private radio stations used by radio amateurs;
- 4th category: licences for air navigation radio stations;
- 7th category: general holder's licences or individual holder's licences. These licences have to be obtained in order to keep radio equipment without actually using it. Manufacturers, importers and distributors therefore have a general holder's licence for the radio equipment in question;
- 8th category: this category actually regards operators' public radio communications. It refers to networks set up:
 - a) by operators of point-to-point networks or point-to-multipoint networks;
 - b) by operators of shared resource networks. This regards the so-called trunked networks using multiple radio channels, shared with other companies;
- 9th category: licences for private radio networks or stations:
 - a) used for trials or testing - such as 5G test licences;
 - b) using devices referred to in Article 33, § 2, of the Act of 13 June 2005 on electronic communications. In principle, these jammers are prohibited but there are a number of exceptions to the rule, for instance jammers installed in prisons;
 - c) using radars not belonging to other categories, for instance weather radars, speed radars...;
 - d) not belonging to any other category.

In addition, the BIPT also issues licences for the use of satellite stations, for instance for broadcasting vehicles for TV broadcasts through SNG or "Satellite-News-Gathering".

Licences issued in 2024 are detailed in Annex E.

1.4.2. Examinations to obtain operator certificates to use certain stations

The BIPT usually organises maritime radio and radio amateur examinations each month in Brussels. As the number of candidates was high in 2024, additional sessions were proposed to meet this demand. The BIPT also organised examination sessions in other places than its premises. For the radio amateur exam, sessions were organised at the Euro Space Center in Redu, as part of an internship for young people. Collaboration has also been established with other partners to organise decentralised exams.

The examination for access to the operator certificate for stations on board vessels is necessary for each user of a radio station in the radio maritime frequency bands. Depending on the user, there are 4 types of examinations (and certificates), divided according to the level of difficulty:

- Restricted radiotelephone operator certificate: the basic certificate allowing the use of a VHF marine radio on the inland waterways and for pleasure sailing at sea;

- SRC ("Short Range Certificate"): for pleasure sailing at sea;
- ROC ("Restricted operating certificate"): mainly intended for professional use for coastal navigation;
- GOC ("Global Operating Certificate"): specially designed for professional use at sea.

For radio amateurs, three types of examinations are organised:

- Examination C: examination for the basic licence. This examination is simple and, when passed, gives access to the use of a limited number of radio amateur bands with limited transmitting power.
- Examination B: the novice examination, which in terms of difficulty is between examination C and A. Passing this examination gives access to the use of most amateur radio bands with medium power.
- Examination A: extensive examination giving access, when passed, to all radio amateur bands with high transmitting power. It is better known as the "HAREC exam".

The exams organised in 2024 are detailed in Annexe E.

73. Subdivision laid down in the Royal Decree of 14 December 2018 amending the annexes to the Royal Decree of 18 December 2009 on private radio communications and user rights for fixed networks and shared resource networks.

74. Radio-relay links or radio communications are used instead of a telephone line or fibre to connect two sites.

1. Electronic communications



The BIPT also issues radiotelephone operator certificates of aircraft stations to the candidates who pass the examination organised by the Directorate-General Air Transport of the FPS Mobility and Transport. The certificates issued by the BIPT in 2024 are also detailed in Annexe E.

2. Postal services

2.1. Postal market indicators

In addition to bpost and the five postal licence holders, about 700 companies are also active on the Belgian postal market. To follow the developments on the market, each year the BIPT conducts a survey among the major postal operators. In 2024, the data of 25 companies were processed for the year 2023. Their cumulated turnover amounts to over 90% of the postal sector's total turnover, creating an accurate image of the general trends on the Belgian postal market. All indicators and their evolution can be consulted on the [BIPT website](#). In the second semester of 2025, the data shall be completed with the 2024 figures. This is the [report](#) describing the main trends observed between 2010 and 2023.

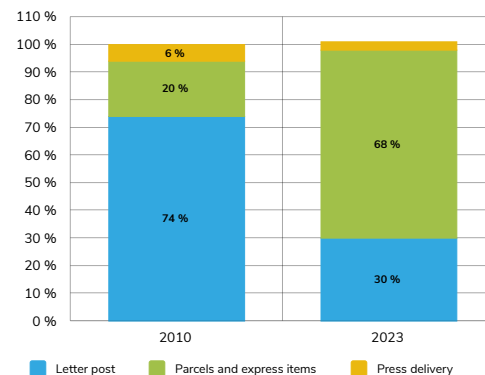
2.1.1. Services

After two years of exceptional double-digit annual growth in turnover (16.3% in 2020 and 10.4% in 2021) and a much quieter year (0.6% in 2022), the postal market picked up again in 2023 (+4.1%). We came back to growth levels that are close to those seen at the end of the previous decade. The total revenue from the postal sector amounted thus to €3.625 billion in 2023.

Historically, there are two opposing underlying trends:

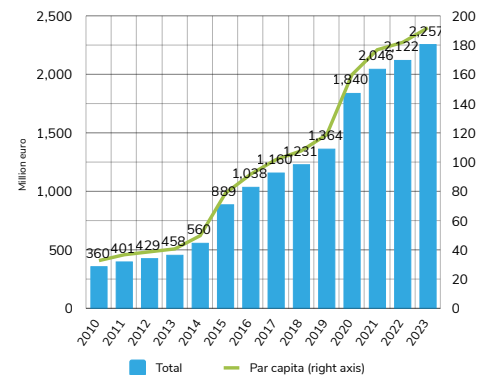
- 1) On the one hand, parcels and express mail are becoming increasingly important in the postal market (in relation to the turnover below).

Composition of the postal market



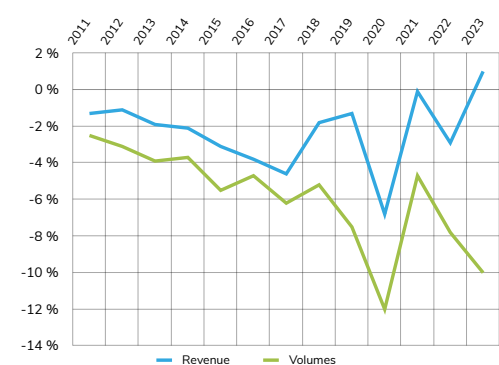
Indeed, the turnover in the parcel segment is constantly increasing, with significant increases on an annual basis, particularly in 2020 (35.0%) and 2021 (11.2%), and more limited in 2022 (3.7%) and 2023 (6.4%).

Turnover of the parcel segment



- 2) On the other hand, the letter post segment has historically seen an annual decrease in terms of volumes and turnover. Volumes experienced the second largest decline since 2011 (-10.2%). However, for the first time since 2010, the turnover has seen a year-on-year increase (+1.0%), and has therefore also contributed for the first time to the growth of the Belgian postal market since 2010.

Volumes and revenues from items of correspondence

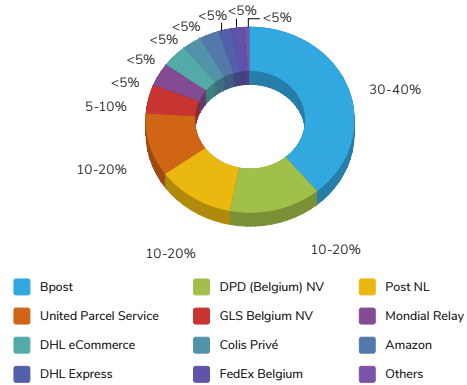


2.1.2. Market players

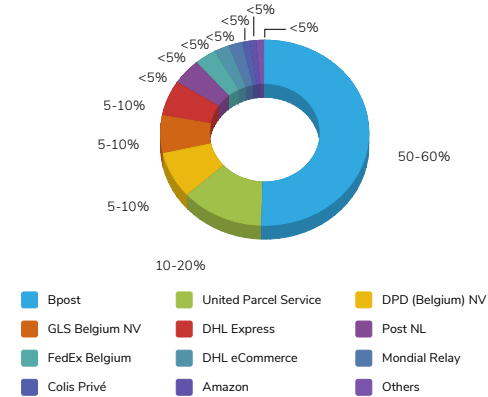
As shown in the two following charts, bpost largely retains its dominant position on the letter post market and is the leader on the parcel and express market.

2. Postal services

Market share based on the parcel and express volume in 2023



Market share based on the overall turnover in 2023



2.2. Universal postal service providers

Any person wishing to provide a letter post service, registered or not, and falling within the scope of the universal service (up to 2 kg), must apply for a licence from the BIPT.

Since Postalia Belgium Logistics⁷⁵ was granted a licence in April 2024, there are six universal service providers: Net Express⁷⁶, for the whole territory, SPAN Diffusion in the 19 municipalities

of the Brussels-Capital Region, bpost, which has been designated to provide the whole of the universal service across the entire territory, Glejor BVBA which wants to deliver letter post services (the registered items included) in the 3650 and 3680 postal code areas, Dimitri Ornelis⁷⁷ which provides services in the municipalities of Deinze, Zulte, Aalter and Waregem, and now Postalia Belgium Logistics, active over the whole territory.



75. Postalia Belgium Logistics, which operates under the trade name "EasyPost".

76. SPRL Net Express, which operates under the trade name "TBC-Post".

77. Dimitri Ornelis is operating under the trade name "ViaVelo".

3. Media

On the territory of the bilingual Brussels-Capital Region the BIPT is responsible for the regulation of the audio and audiovisual media service providers and video-sharing platforms established thereto, barring the providers that broadcast/make/host exclusively Dutch-speaking or exclusively French-speaking programmes.

The providers of audiovisual media services and video-sharing platform services in the bilingual Brussels-Capital Region have to register with the BIPT for each service they intend to provide.

In 2024 no new service provider was registered. Three audiovisual media service providers have been acknowledged by the BIPT in the bilingual Brussels-Capital Region⁷⁸.



78. Maghreb TV, Canal Maroc 1 and DAZN/Eleven Sports Network.



Belgian Institute
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ANNEXES



A. Financial report and annual accounts of the funds

Article 34, third subparagraph of the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors stipulates that the annual report should comprise, among other things, a financial report and the annual accounts of the universal service funds for the postal and telecommunications services respectively.

The BIPT accounts as well as those of the Office of the Ombudsman for the Postal Sector and the Office of the Ombudsman for Telecommunications are shown below. These are independent bodies, created to handle the complaints from customers against the operators from the sectors in question. The role of the BIPT is limited to making available personnel and providing logistical support for purchases, accounting and budget.

In 2024, no universal service funds were activated.

Accounting of the BIPT – 2024			
REVENUES	EUR	EXPENDITURE	EUR
		Personnel costs	
Repayments	74,728	Payroll	15,853,419
		Allowances, grants and indemnities	5,964,399
Services performed for third parties	13,441	Social security contributions and pensions	10,604,194
		Benefits and employer obligations	898,886
Licence and monitoring fees - private radio communications	19,419,768		
		Operational resources	
		Maintenance work	936,366
Public licence fees	55,123,176	Vehicle maintenance	97,586
		Insurance	107,705
Post	3,720,540	Small technical equipment	159,721
		Expenditure on information processing	963,328
AOB	54,739	Work by third parties	3,040,808
		Training	74,942
Refund FPS Economy	56,754	Assignments in other countries	132,419
		Telephone - mail - transport	662,793
		Rental (buildings and car parks)	1,914,379
		Taxes	747,216
		Umbrella organisations	1,543,651
		Discounts and losses	32,545
		Investment expenditure	
		Vehicles	121,480
		Office equipment	363,701
		IT equipment	1,606,151
		Technical equipment	536,955
		Development costs	2,340,647
		Other expenditure	
		Treasury	30,437,401
		CF/RT	614,104
TOTAL	78,463,148	TOTAL	79,754,796

A. Financial report and annual accounts of the funds

Accounting of the Office of the Ombudsman for the Postal Sector - 2024

REVENUES	EUR	EXPENDITURE	EUR
		Personnel costs	
Repayments		Payroll	1,059,990
		Allowances, grants and indemnities	299,531
Services on behalf of third parties (sector contribution)	2,589,115	Social security contributions and pensions	699,438
		Benefits and employer obligations	73,692
		Operational resources	
		Maintenance work	0
		Vehicle maintenance	7,465
		Insurance	5,072
		Expenditure on information processing	44,767
		Work by third parties	53,374
		Training	223
		Assignments in other countries	575
		Telephone - mail - transport	18,236
		Rental (buildings and car parks)	0
		Taxes	609
		Umbrella organisations	600
		Contribution to the Consumer Mediation Service	85,682
		Investment expenditure	
		Vehicles	0
		Office equipment	0
		IT equipment	5,103
		Technical equipment	0
TOTAL	2,589,115	TOTAL	2,354,355

Accounting of the Office of the Ombudsman for Telecommunications - 2024

REVENUES	EUR	EXPENDITURE	EUR
		Personnel costs	
Repayments	197	Payroll	1,170,101
		Allowances, grants and indemnities	345,986
Services on behalf of third parties (sector contribution)	2,849,559	Social security contributions and pensions	770,329
		Benefits and employer obligations	78,195
AOB	10,000		
		Operational resources	
		Maintenance work	0
		Vehicle maintenance	11,064
		Insurance	6,510
		Expenditure on information processing	53,090
		Work by third parties	76,541
		Training	1,307
		Assignments in other countries	175
		Telephone - mail - transport	23,839
		Rental (buildings and car parks)	0
		Taxes	909
		Umbrella organisations	600
		Contribution to the Consumer Mediation Service	146,882
		Investment expenditure	
		Vehicles	0
		Office equipment	0
		IT equipment	9,721
		Technical equipment	0
TOTAL	2,859,756	TOTAL	2,695,248

B. BIPT staff on 31 December 2024

The BIPT	
Staff members	Full-time equivalents (FTE)
251	242.2
Level A	
101	97.8
Level B	
42	40.2
Level C	
106	102.2
Level D	
2	2

Office of the Ombudsman for the Postal Sector	
Staff members made available	Full-time equivalents (FTE)
12	11.6
Level A	
3	3
Level B	
5	4.6
Level C	
4	4
Level D	
0	0

BIPT regulator	
Staff members	Full-time equivalents (FTE)
222	214.3
Level A	
94	91.3
Level B	
37	35.6
Level C	
89	85.4
Level D	
2	2

Office of the Ombudsman for Telecommunications	
Staff members made available	Full-time equivalents (FTE)
17	16.3
Level A	
4	3.5
Level B	
0	0
Level C	
13	12.8
Level D	
0	0



C. Report on infringement procedures

Article 34, third subparagraph, of the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors ("Act on the status of the BIPT") requires that the annual report also contains a report on the monitoring referred to in Article 21.

Article 21 of the Act on the status of the BIPT lays down the different aspects of the proceedings that can be initiated by the Council when it suspects a violation of the legislation or regulation the compliance with which is monitored by the BIPT.

In 2024, the BIPT conducted several investigations, but none resulted in a sanction.



D. Dispute coordination

The BIPT is responsible for the coordination of legal appeals mainly concerning the decisions it has adopted. The BIPT is also regularly asked to follow disputes involving the Belgian State and concerning telecommunications or postal services. Depending on the procedures, exchanges can also take place between the BIPT and other state, federal or European authorities.

The BIPT followed new appeals, all of which were lodged in 2024; on some appeals lodged in 2023 a decision was given in 2024.

Follow-up of the appeals lodged in 2024

- By means of an appeal lodged on 12 February 2024 before the Market Court, Telenet seeks the annulment of the Decision of the BIPT of 12 December 2023 imposing a €1,000,000 fine as the operator does not propose the Easy Switch procedure as a simplified standard migration process in its points of sale and therefore does not comply with its obligations regarding Easy Switch.
- By a judgement of 4 September 2024, the Court annuls the Decision of the BIPT of 12 December 2023 imposing a fine on Telenet for

failure by the operator to comply with its obligations regarding Easy Switch.

The BIPT has decided to appeal in cassation against this judgement.

- On 14 June 2024, Fiberklaar lodged an action for annulment against the Decision of the Termonde Municipal Council of 16 January 2024 approving the regulation on fees for nuisance caused by works on public utility equipment (other than electricity, gas and drinking water) and infrastructure in the municipal public domain. The BIPT is an intervener in this procedure and has made some observations supporting the arguments of the applicant.
- On 29 November 2024, Proximus lodged an appeal before the Constitutional Court seeking annulment of Article 62 of the Act of 3 May 2024 pertaining to various provisions regarding the economy. This Article provides, subject to conditions, for compensation to be granted to the subscriber or end-user in the event of a complete interruption of more than eight hours in the provision of a publicly available electronic communications service.

Follow-up of the appeals for which a decision was issued in 2024

- On 5 September 2023, Lycamobile brought an action before the Market Court against the Decision of the BIPT of 4 July 2023 imposing a €1,385,000 fine for failure to connect to the central number database used by the emergency services.

Article 106/2 of the ECA requires all operators providing public telephone services to create a central number database keeping subscriber data, as well as the name of the operator that has the contractual relationship with the subscriber, up to date in a centralised manner. The Royal Decree on the central number database lays down the modalities for implementing Article 106/2 of the ECA and, in particular, Article 3 requires operators providing public telephone services to enter subscriber data updated on a daily basis into the central number database.

The BIPT found that Lycamobile failed to comply with the obligation to connect to the central number database.

In a judgement of 10 April 2024, the Market Court confirmed the infringement but partially

cancels the Decision of 4 July 2023 insofar as it imposes on Lycamobile a fine for which insufficient reasons are given for determining the amount, and annuls the disputed decision insofar as it contained a connection order. On 22 November 2024, the BIPT appealed before the Court of Cassation against this judgement.

- On 14 September 2023, by means of an action before the Market Court, Sewan sought the annulment of the Decision of 4 July 2023 setting the fine imposed on Sewan for non-compliance with certain rules relating to the register of premium-rate numbers. This decision follows on from the Decision of 24 May 2022 and the judgement of the Market Court of 8 March 2023, which confirmed the infringement but asked the BIPT to give a new ruling on that amount.

By a judgement of 20 March 2024, the Court indicates that the first Decision of the BIPT (of 24 May 2022), imposing a fine on Sewan for non-compliance with certain rules relating to the register of premium-rate numbers, is final in its entirety except for the amount of the fine.

By the same judgement, the Market Court pronounces on the second decision of the

D. Dispute coordination

BIPT (of 4 July 2023), setting the new amount of the fine imposed on Sewan following the judgement of the Market Court of 8 March 2023. The Court rejected the increase for aggravating circumstances and reduced the fine to its basic amount.

- On 7 December 2023, by means of an action before the Market Court, Orange Belgium sought the annulment of the Decision of 26 September 2023 regarding the identification of the network termination point (or “NTP”) for broadband services.

In order to promote the freedom of choice of terminal equipment, the BIPT is providing, by means of this decision, clarity regarding the way in which it interprets the regulations relating to terminal equipment.

Pursuant to the BEREC Guidelines, the BIPT lays down in this Decision the position of NTPs and analyses the concrete consequences.

The BIPT also addresses the publication of the technical specifications needed to ensure that freedom of choice of modem is implemented in the best possible way.

The Court of Markets, by its judgement of 22 May 2024, rejected the appeal of Orange Belgium.

Complaints about infrastructure deployment

An operator has the right to use, among other things, the façades along a public road to deploy its network. However, before carrying out such work on private property, an operator must first seek an agreement with the owner concerned.

Citizens can file a complaint with the BIPT in this regard. As a first step, the BIPT will examine whether an informal solution can be found. If this is not possible, a formal procedure may be initiated in which the operator concerned informs the owner by registered mail of the planned work. The owner then has 8 days to lodge a reasoned objection with the BIPT.

In 2024, the BIPT received 76 complaints. Eight formal procedures were then launched. Two formal complaints resulted in a decision by the BIPT, two complaints were rejected for lack of reasoning, one is still pending and three were finally resolved by mutual agreement between the operator and the owner. The remaining



complaints reached a favourable conclusion informally. This is the case in many cases. In most cases, the operator concerned attempted to reach an agreement with the complainant

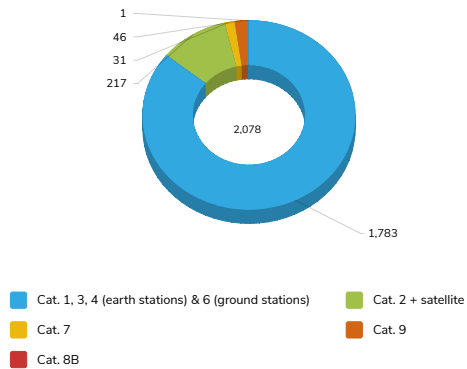
concerned on the installation/re-installation of the equipment in question or additional explanations were provided on the proposed installation method.

E. Licences, examinations and certificates issued in 2024

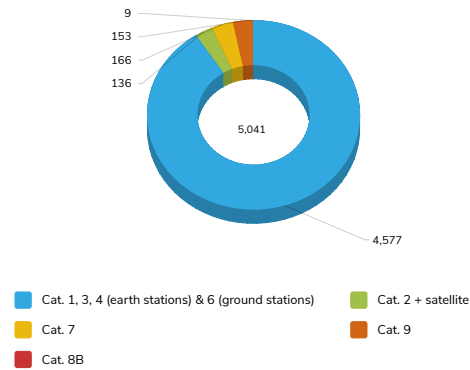
Licence granting

In 2024, 1,783 new licences were issued, 4,577 were adapted and 156 were cancelled. This amounts to a total of 6,516 files handled in 2024.

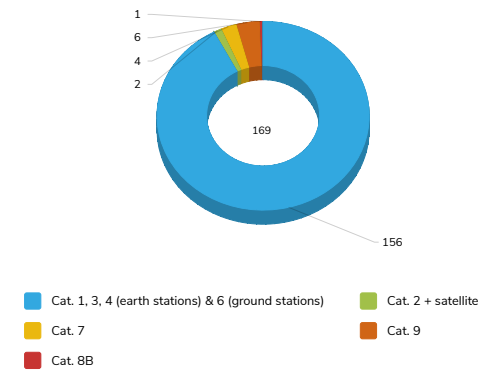
Licences issued in 2024



Licences modified in 2024



Licences cancelled in 2024

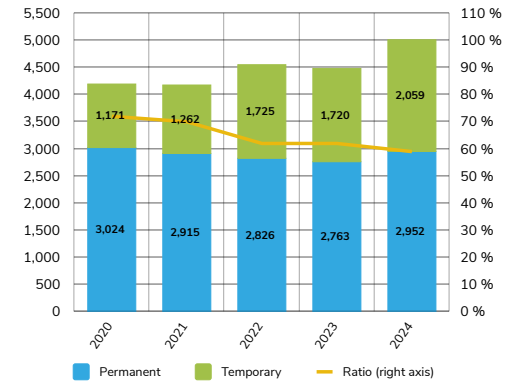


The chart “Licences issued in 2024” gives an overview of the changes made in previously granted licences. The adaptations are diverse, e.g. adding/removing radio stations or frequencies, changes in addresses, changes in the contact person’s details, etc.

Licences of the 1st and 3rd category can also be represented over time.

The chart below gives an overview of the evolution of the temporary and permanent licences of both categories in recent years.

Evolution of temporary and permanent licences of categories 1 and 3



E. Licences, examinations and certificates issued in 2024

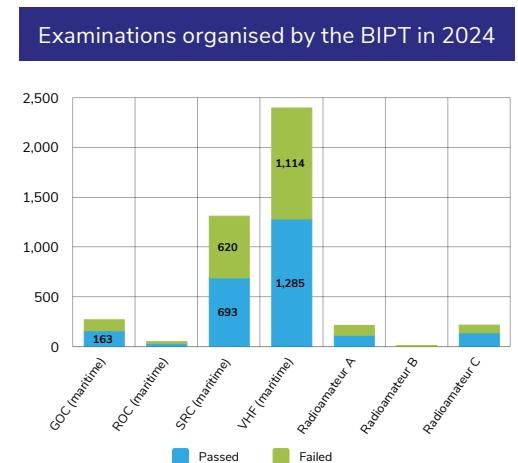


The details of the active licences (or having been activated in case of temporary licences) in 2024 are as follows:

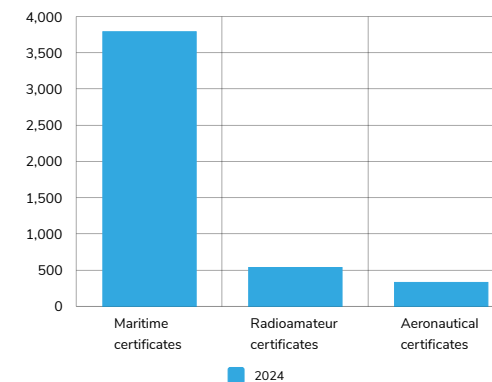
	Permanent licences	Temporary licences
Category 1	2,408	2,024
Category 2 + satellite	134	20
Category 3	544	35
Category 4	87	1
Category 6	75	9
Category 7	423	0
Category 8A	8	2
Category 8B	6	0
Category 9A	23	47
Category 9B	0	4
Category 9C	23	8

Examinations to obtain operator certificates to use certain stations

The various examinations organised by the BIPT in 2024 are detailed in the following chart:



Certificates issued in 2024



The chart below illustrates the distribution according to the type of certificate

F. Situation of the 2024 Operational Plan

Strategic axis “Competition” - Promoting sustainable competition and investments

C/1/2024/01 Situation of the electronic communications and television markets	Objective accomplished
C/1/2024/02 Publication of a 2023 postal observatory	Objective accomplished
C/1/2024/03 Report on the monitoring of net neutrality in Belgium	Objective accomplished
C/1/2024/04 Preparation of a draft decision on the broadband and broadcasting markets	In progress
C/1/2024/05 Preparation of a draft decision on the broadband and wholesale dedicated capacity markets	In progress
C/1/2024/06 Drafting of a tariff decision on the Ethernet transport (fibre and VDSL)	On hold
C/1/2024/07 Drafting of a tariff decision on the acces to point-to-point and point-to-multipoint FTTH networks of Proximus and its joint ventures	On hold
C/1/2024/08 Drafting of a tariff decision on the one-time fees	On hold
C/1/2024/09 Wyre: Control of the valuation of assets transferred by Fluvius	Objective accomplished
C/1/2024/10 Performance of a margin squeeze test on selected individual contracts of Proximus on the large companies market	Objective accomplished
C/1/2024/11 Adoption of a decision on fixed and mobile call termination rates (MTR and FTR)	In progress

Strategic axis “Competition” - Spurring innovation

C/2/2024/01 Follow-up of the sustainability of the telecommunications networks in Belgium	Objective postponed to 2025
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Strategic axis “Users” - Contributing to providing transparent information to consumers and promoting social inclusion

G/1/2024/01 National price comparison of mobile services	Objective accomplished
G/1/2024/02 National price comparison of fixed and convergent services	Objective accomplished
G/1/2024/03 Performance of an international price benchmarking study of the electronic communications services in the residential market	Objective accomplished
G/1/2024/04 Price simulator: Definition of guidelines for the future specifications	In progress
G/1/2024/05 Data Portal www.bipt-data.be	Objective accomplished
G/1/2024/06 Platform “I alert the BIPT”	Abandoned
G/1/2024/07 Survey on the perception of consumers on the functioning of the market	Objective accomplished
G/1/2024/08 Implementation of Regulation 2018/644 on cross-border parcel delivery services	Objective accomplished
G/1/2024/09 Implementation of the new postal legislation	Objective accomplished
G/1/2024/10 Monitoring regarding the Easy Switch procedure	Objective accomplished
G/1/2024/11 Monitoring on the maximum waiting time to reach customer service by telephone	Objective accomplished
G/1/2024/12 Monitoring on the reimbursement of possible remaining credit on prepaid cards	Objective accomplished
G/1/2024/13 Participation in the joint European monitoring campaign on the conformity of radio products placed on the market	Objective postponed to 2025
G/1/2024/14 Audit of bpost’s internal and external measurement systems regarding delivery times	In the process of being finalised
G/1/2024/15 Monitoring of the observance of delivery times by bpost and opinion on the customer satisfaction of bpost	In the process of being finalised
G/1/2024/16 Monitoring of the analytical accounting separation of the universal service provider bpost	Objective accomplished
G/1/2024/17 Monitoring of the universal service for electronic communications services	Objective accomplished
G/1/2024/18 Monitoring of the price of products included in the universal postal service	Objective accomplished
G/1/2024/19 Verification of the calculation of the net cost of the universal service obligations submitted by bpost	Objective accomplished

F. Situation of the 2024 Operational Plan

Strategic axis “Users” - Ensuring a reliable environment	
G/2/2024/01 Inspection of critical infrastructures	In progress
G/2/2024/02 Notification of security incidents	Objective accomplished
G/2/2024/03 Risk analyses and reporting	Objective accomplished
G/2/2024/04 Resilience of telecommunications against a power outage	Objective accomplished
G/2/2024/05 Prior authorisation for the use of components of 5G networks	Objective accomplished
G/2/2024/06 Operational management of security advices	Objective accomplished

Strategic axis “Scarce resources” - Managing scarce resources	
S/1/2024/01 Adaptation of the numbering plan to the long-term changes in the market	Objective partially accomplished
S/1/2024/02 Auction of the 3410-3430 MHz frequency band	Objective partially accomplished
S/1/2024/03 Evaluation of WRC-2023	Objective accomplished
S/1/2024/04 5G knowledge and learning platform	Objective accomplished

Strategic axis “Efficient functioning” - Ensuring an accessible functioning	
E/1/2024/01 Social media campaign on consumer protection	Objective accomplished
E/1/2024/02 Participation in national and international consultation bodies	Objective accomplished
E/1/2024/03 Participation in national and international consultation bodies concerning postal services	Objective accomplished
E/1/2024/04 Participation in national and international consultation bodies with a view to the Belgian presidency of the Council of the European Union	Objective accomplished

Strategic axis “Efficient functioning” - Being an attractive employer	
E/2/2024/01 Internal operational plan	Objective accomplished



G. List of documents published in 2024

Decisions	
11/01/2024	Decision of 2 January 2024 on the composition of the board referred to in the Royal Decree of 5 May 2006 regarding a conciliation procedure before the BIPT for the year 2024
12/01/2024	Decision of 19 December 2023 on the data to be provided for the geographical studies with regard to the mobile electronic communications networks capable of providing broadband services
26/01/2024	Decision of 23 January 2024 on the declaration of conformity of bpost's cost accounting system for the year 2022
16/04/2024	Decision of 16 April 2024 determining the terms for the notification provided for by Article 6/1 of the Act of 26 January 2018 on postal services
18/04/2024	Decision of 16 April 2024 concerning the request for transfer of the rights of use for the 3600 MHz band from NRB to Proximus
24/05/2024	Decision of 7 May 2024 on the monitoring of mail delivery times for the year 2022
05/06/2024	Decision of 28 May 2024 on the technical and operational conditions regarding the mobile communication services on board vessels
04/07/2024	Decision of 2 July 2024 on radio interfaces related to short-range devices, maritime stations, wide band audio links, intelligent transport systems and satellite earth stations
07/08/2024	Decision of 23 July 2024 - Market analysis decision mobile termination (MTR)
07/08/2024	Decision of 23 July 2024 - Market analysis decision fixed termination (FTR)
30/08/2024	Decision of 13 August 2024 regarding the granting of rights of use for the frequency bands for category 8a fixed networks
30/08/2024	Decision of 27 August 2024 on the allocation of spectrum to Citymesh Integrator N.V. for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea
26/09/2024	Decision of 16 September 2024 determining the frequency bands subject to the notification referred to in Article 15/1, paragraph 3, subparagraph 4, of the Act of 13 June 2005 on electronic communications
26/09/2024	Decision of 16 September 2024 determining the terms and information to provide within the framework of the notifications referred to in Article 15/1 of the Act of 13 June 2005 on electronic communications
17/10/2024	Decision of 15 October 2024 regarding the definition of the common charger standards

Decisions	
17/10/2024	Decision of 8 October 2024 determining the terms for the reporting provided for by Article 6/2 of the Act of 26 January 2018 on postal services
25/10/2024	Decision of 22 October 2024 regarding the analysis of tariff increases for bpost's single-piece rates for the year 2025
25/10/2024	Decision of 8 October 2024 – [XXX] v [XXX]
28/10/2024	Decision of 22 October 2024 regarding the listing and classification of products and services provided by the universal service provider for the year 2023
20/11/2024	Decision of 19 November 2024 on radio interfaces related to devices using the ultra wideband technology (UWB)
20/11/2024	Decision of 12 November 2024 on the allocation of spectrum to e-BO Enterprises N.V. and Telenet Group N.V. for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea
27/11/2024	Decision of 5 November 2024 – [XXX] v VOO
09/12/2024	Decision of 19 November 2024 on the valuation of assets contributed by Fluvius to Wyre
24/12/2024	Decision of 17 December 2024 on the composition of the board referred to in the Royal Decree of 5 May 2006 regarding a conciliation procedure before the BIPT for the year 2025

G. List of documents published in 2024

Consultations	
08/03/2024	Consultation on the draft decision determining the terms for the notification provided for by Article 6/1 of the Act of 26 January 2018 on postal services
11/03/2024	Consultation on the technical and operational conditions regarding the mobile communication services on board vessels (2024)
11/03/2024	Consultation on the household profiles for the national benchmarking
13/03/2024	Consultation regarding radio interfaces related to short-range devices, maritime stations, wide band audio links, intelligent transport systems and satellite earth stations
26/03/2024	Consultation on the draft strategic plan of the BIPT for the 2024-2026 period
27/03/2024	Consultation on the frequencies, powers and transmission modes that may be used by radio amateurs
25/04/2024	Prior consultation on modifications to the reference offer for wholesale access to the VOO cable network
23/05/2024	Consultation on the draft decision on the granting of spectrum to Citymesh Integrator N.V. for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea
07/06/2024	Consultation on the draft decision regarding the granting of rights of use for the frequency bands for category 8a fixed networks
03/07/2024	Consultation on the renewal of the 2600 MHz rights of use
31/07/2024	Consultation on the draft decision of the BIPT determining the terms for the reporting provided for by Article 6/2 of the Act of 26 January 2018 on postal services
14/08/2024	Preliminary consultation on modifications of the reference offer for wholesale access to Unifiber's fibre network
20/08/2024	Consultation on the Regularisation decision regarding the allocation of spectrum to e-BO Enterprises N.V. and Telenet Group N.V. for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea
06/09/2024	Consultation regarding the definition of universal charger standards
02/10/2024	Consultation on the draft decision on the extension of the usage rights at 2600 MHz
03/10/2024	Consultation on radio interfaces related to devices using the ultra wideband technology (UWB)
22/10/2024	Public consultation on methodology for Royal decree Sustainability Indicators (parcel delivery)
12/11/2024	Consultation regarding the draft decision on the rights of use of Citymesh Mobile in the 70-80 GHz frequency band
11/12/2024	Consultation on the draft of the operational plan 2025

Communications	
15/01/2024	Communication regarding the monitoring of the universal telecommunications service 2023
25/04/2024	Communication of 24 April 2024 on the evolution of the price of fixed and convergent residential telecom services over the past five years (from 2019 to 2024)
15/05/2024	Communication on the list of postal services providers holding an individual licence (2024)
27/05/2024	Communication of 24 May 2024 on the evolution of the price of standalone mobile telecom services (2019-2024)
28/05/2024	Communication of 21 May 2024 regarding a price comparison study on the single-piece tariffs 2020-2023 for priority and non-priority letter post as well as the 2 kg package as offered by the universal service provider
12/06/2024	Communication of 5 June 2024 regarding the assessment of the bpost tariffs considered within the framework of the European regulation on cross-border parcel delivery services
25/06/2024	Communication of 29 May 2024 on applying a margin squeeze test for the large business segment at the level of individual contracts
25/06/2024	Communication of 22 April 2024 on applying a margin squeeze test for the residential and small business segment
25/06/2024	Communication of 19 June 2024 regarding guidelines implementing margin squeeze tests
26/06/2024	The situation of the electronic communications and television market (2023)
27/06/2024	Communication on the household profiles for the national price benchmarking
28/06/2024	Communication regarding the monitoring of net neutrality in Belgium (period from 1 May 2023 to 30 April 2024)
10/07/2024	Communication of 25 June 2024 on the conformity of Telenet's cost accounting system for 2022
10/07/2024	Communication of 25 June 2024 on the conformity of Brutélé's cost accounting system for 2022
10/07/2024	Communication of 25 June 2024 on the conformity of VOO's cost accounting system for 2022
11/07/2024	Communication of 2 July 2024 concerning the list of parcel delivery service providers that are compliant with the notification rule on 31 June 2024
01/10/2024	Communication of 23 September 2024 regarding the Belgian postal services observatory for 2023
04/10/2024	Communication of 1 October 2024 concerning the list of parcel delivery service providers that are compliant with the notification rule on 30 September 2024

G. List of documents published in 2024

Communications	
28/10/2024	Communication of 22 October 2024 on the benchmarking of the fixed service and convergent bundle rates on the residential market tariffs applied in Q3 2024
29/10/2024	Instructions for the provision of information needed for the compilation of statistics on the requests for retained data from authorities
04/11/2024	Communication of 23 October 2024 regarding the reporting about bpost's measuring systems for the year 2023 within the context of the management contract for services of general economic interest
02/12/2024	Results of the benchmarking of mobile service rates in Belgium [Tariffs applied in Q4 2024]
04/12/2024	NIS-2 Registration
18/12/2024	Communication of 12 December 2024 regarding the assessment of the bpost tariffs considered within the framework of the European regulation on cross-border parcel delivery services
19/12/2024	Communication of 17 December 2024 regarding the comparative study on the prices of telecom services in Belgium and in the neighbouring countries [Tariffs of October 2024]
30/12/2024	Communication of 24 December 2024 on a study regarding the intangible and market benefits of the Belgian universal postal service provider

Opinions	
15/02/2024	Opinion of 9 March 2022 on the draft Royal Decree regarding the data to be retained by the telecom operators for the authorities and the statistics on the communication of these data to the authorities
16/02/2024	Opinion of 11 August 2023 on the amendments to the Royal Decree on prepaid cards
16/02/2024	Opinion of 21 February 2023 on the request of Proximus to use a facial comparison tool to identify its customers
07/03/2024	Opinion on a preliminary draft RD regarding the deadlines for answering written questions and complaints
22/03/2024	Opinion of 4 July 2023 on the draft Royal Decree regarding the granting of user rights for the establishment and operation of transmission installations located in Belgium's exclusive economic area in the North Sea
16/04/2024	Opinion of 15 September 2023 regarding the draft Royal Decree amending the Royal Decree of 18 December 2009 on private radio communications and rights of use for fixed networks and trunk networks
22/05/2024	Opinion of 29 April 2024 on the draft resolutions examining of the possibility of merging market regulators with a view to improving their functioning
26/07/2024	Opinion of 25 June 2024 regarding the 2022 and 2023 action plans of bpost following the 2022 customer satisfaction survey

Press releases	
21/03/2024	5G roll-out in Belgium: network mapping and quality
25/04/2024	The BIPT publishes its price study on fixed and convergent telecom services for 2019-2024
15/05/2024	Operators envisage cooperation for fibre deployment
24/05/2024	Digital Services Act: Belgium has designated its four competent authorities to enforce the provisions of the European regulation Brussels
27/05/2024	Consumers see the mobile subscription market evolving favourably between 2019 and 2024
28/05/2024	New comparative study by BIPT confirms high rates for stamps in our country
07/06/2024	No candidacies for the auction of the 3410-3430 MHz band after a second call
13/06/2024	A new step in combatting telephone fraud
24/06/2024	Again strong mobile data growth and faster 5G roll-out in 2023
26/06/2024	Strong growth of high-speed fixed Internet lines (> 1 Gbps) in 2023
28/06/2024	5G roll-out reaches 95% of Belgian households
26/07/2024	Proximus/Fiberklaar and Telenet/Wyre intend to cooperate to roll out optical fibre in Flanders
01/10/2024	Postal market in full growth again in 2023
25/10/2024	Non-prior stamp price to rise to €1.53 and prior stamp to €2.37 from 1 January 2025
28/10/2024	Smart telecommunications users can save a lot on an annual basis
02/12/2024	The BIPT sees a particularly dynamic and responsive mobile market
11/12/2024	The BIPT publishes an update of the results of its mobile study following the market developments
19/12/2024	Impact of the launch of the fourth operator on Belgium's position in the international price comparison
19/12/2024	The BIPT publishes its 2024 international comparative price study
21/03/2024	5G roll-out in Belgium: network mapping and quality



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ELECTRONIC COMMUNICATIONS | POSTAL SERVICES | SPECTRUM MANAGEMENT | MEDIA IN BRUSSELS | NETWORK SECURITY | ONLINE PLATFORMS

ANNUAL REPORT

