



Belgian Institute for Postal Services
and Telecommunications



ANNUAL REPORT 2020

ELECTRONIC COMMUNICATIONS

POSTAL SERVICES

SPECTRUM MANAGEMENT

MEDIA IN BRUSSELS

NETWORK SECURITY

FOREWORD

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Effective and reliable postal and communication networks are at the forefront of the BIPT's concerns

Ensuring the preservation of social interaction and a continuous service for all

FOREWORD



The year 2020 was characterised by an unprecedented health crisis the consequences of which were, among other things, the teleworking obligation, distance education and the closing of non-essential stores. We then realised, more than ever, the importance of effective and reliable postal and communications networks. Electronic communications services, the media and e-commerce reached a predominant position in the “new” daily life of numerous citizens. The monitoring and regulation of these sectors proved to be all the more important. In collaboration with the operators and at the request of the crisis centre, the BIPT took great care to ensure that no major failure or congestion happened on the electronic communications networks, despite sudden changes in the use of services and the significant traffic increase. In this context, the operators also committed to maintain the service, even if users faced payment difficulties, thus enabling, among other things, the organisation of online exams without interruptions. The increase in the sending of parcels, which has been noted for several years now, was also amplified (by more than 50%) by the health crisis. Furthermore, the Covid-19 pandemic tested the agility of the BIPT which changed its internal operations overnight, as well as how it interacts in constant dialogue with stakeholders.

2020 was also the year of other structuring developments, such as the online release of our new website, with a modern design reflecting our new graphic identity. A new and more user-friendly tariff simulator for electronic communications services was

also launched in 2020. As shown in studies carried out by the BIPT comparing the tariffs of telecommunications services in Belgium, besttariff.be allows consumers to make considerable savings. This tariff simulator (www.besttariff.be), the postalpoint.be website which presents the data of all postal points available in Belgium, or the [data portal](#) regarding the quality of networks, which have all been developed under the responsibility of the BIPT, are all valuable tools allowing consumers to find

reliable information and to make informed choices to reap the benefits of competition. A communication campaign was launched in 2020 to make them better known to the wider public and to promote their use. This campaign was successful as the number of people using the tariff simulator doubled. With a view to improving the Easy Switch procedure (still underused by consumers) facilitating the switch of fixed operators, the BIPT handed over an evaluation report to the minister to adapt it.

The BIPT also assumed increasing importance on the international stage in 2020. Regarding electronic communications, Michel Van Bellinghen was elected BEREC Chair for 2021. This election involved important responsibilities as of 2020 as BEREC Vice-Chair. The BIPT developed thus the BEREC Strategy 2021-2025 and coordinated the development of the Work Programme 2021. This is an opportunity for the Belgian regulator to steer work at the European level for a few years. Regarding postal matters, Jack Hamande was nominated by Belgium as a candidate to the chairmanship of the UPU, underlining the BIPT's postal expertise on the global stage. In this exceptional context, the international team of the BIPT was strengthened accordingly.

At the national level, the BIPT provided its expertise in the context of the draft bill transposing Directive 2018/1972 of the European Parliament and of the Council of 11 December 2018 establishing the European Electronic Communications Code (hereafter the “European Electronic Communications Code”).

The year 2020 was characterised by an unprecedented health crisis.

2020 was also the first year of the implementation of the new strategic plan



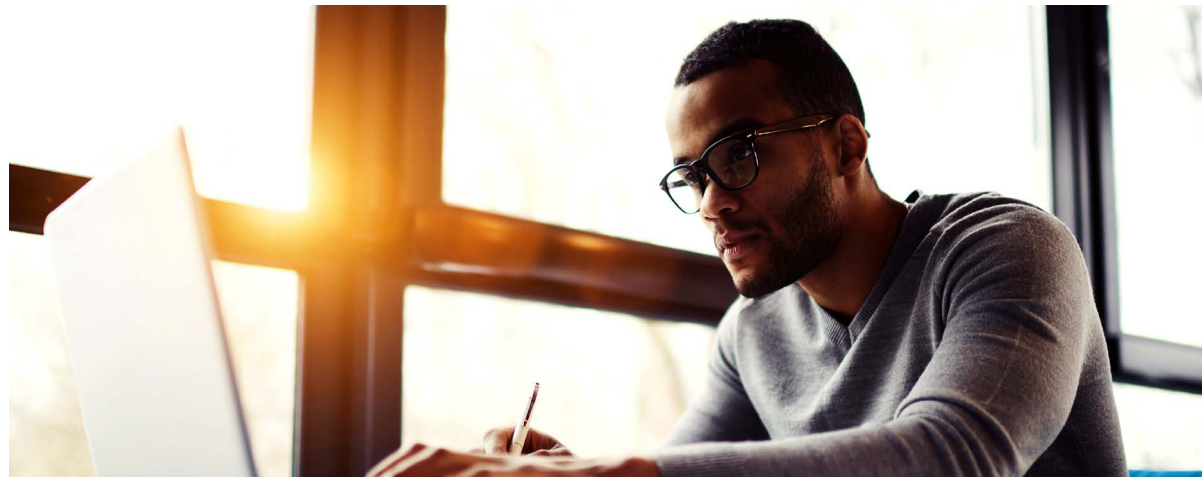
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A sector consultation was organised in April 2020 in this regard, even though the government was in caretaker mode and managing the Covid-19 crisis. Following the formal notice to Belgium due to the late transposition, the new government immediately handled this issue when taking office by the end of 2020. Regarding the postal sector, the draft implementation orders of the Act of 26 January 2018 on postal services were submitted to the minister, allowing to finalise the reform of the postal regulatory framework which began with the Postal Act of 26 January 2018.

2020 was also the first year of the implementation of the BIPT's new three-year strategic plan. This plan builds on the previous one regarding the mission, values and strategic axes with a vision of embodying and defending a reliable and competitive communications environment for everyone, regarding electronic communications, media and postal services. This new vision reflects in a succinct but also assertive manner what the BIPT defends. Besides reminding the essential role of the regulator to promote competition, it puts the reliability of services and information provided to users at the heart of the BIPT's work.

The security of networks and information systems received thus particular attention in 2020, given the important role they played in maintaining the economic activity, education and social contacts. In collaboration with the National Crisis Centre, the BIPT formulated among other things a proposal to



reorganise the identification process of national critical infrastructures. Despite the stability observed during the health crisis, we have noticed that networks are sometimes out of order for several hours, depriving thousands of users of means of communication. The risk of instability associated with an increased reliance on software layers in the networks receives the BIPT's full attention. As every year, the BIPT also participated in the fight against fraud via electronic communications services. In particular, a bill was formulated to fight against the new forms of fraud via SMS (smishing). This bill was included in the draft transposition of the European Electronic Communications Code.

In order to address the new uses which characterise the market, for instance watching television in a non-

linear way (streaming, replay, on-demand, via different devices, including mobile devices...), operators are speeding up the deployment of fixed and mobile high-speed networks. Ambitious objectives were announced concerning territorial coverage with optical fibre and the deployment of 5G networks has begun even if Belgium is experiencing difficulties in establishing the necessary regulatory framework. The BIPT, whose tasks include the promotion of connectivity and access to very high capacity networks, is actively contributing to these developments. In the absence of an agreement between the various levels of political competence concerning a multiband (and 5G) auction, the deployment of 5G could be launched thanks to the BIPT, which granted temporary rights of use for the 3600-3640 MHz band on 14 July 2020. This is a

FOREWORD

temporary solution proposed by the BIPT that nevertheless allows to start the initial 5G work. It is only, of course, after the auction of new frequency bands (3.6 GHz and 700 MHz) that operators will be able to fully deploy their 5G networks. In order to facilitate the political agreement on the sharing of revenues from the auction, the BIPT published a study objectifying the spectrum volume and value which can be linked to the consumption of media falling within the competence of the Communities, while the telecom traffic falls within the competence of the federal government. 5G additionally raises specific security challenges given its structuring societal impact. In that context, the European Commission adopted a 5G toolbox and, once again, the BIPT worked in consultation with the National Security Council to develop legislative measures to better protect the future 5G infrastructure in Belgium.

One of the traditional tasks of the regulator is to foster healthy competition and maintain market access. In the electronic communications sector, the BIPT continued to work on implementing its market analysis concerning broadband and audiovisual services. In collaboration with the media regulators (VRM, CSA and Medienrat), a crucial part of this implementation was finalised, i.e. the decisions on the tariffs for access to the cable networks. These decisions allow alternative operators to get wholesale access to cable networks at a fair price. These fair prices allow to develop competition on the retail market while correctly compensating network operators for that access. With the same goal, the

BIPT also launched a consultation on tariffs for access to Proximus' fibre network. This draft decision seeks to determine the wholesale tariffs allowing competition in favour of consumers, while safeguarding the incentive to invest in optical fibre. On the postal market, the BIPT finalised the analysis of the analytical accounting of bpost for the years 2017 and 2018. This analysis resulting in a declaration of non-compliance for 2017, bpost made changes as requested by the BIPT to bring its analytical accounting for 2018 into compliance.

The annual report of the BIPT presents how it fulfilled its tasks in 2020, based on the strategic axes: competition, users, scarce resources and efficient functioning. We invite you to read it to get a comprehensive view on what our 218 staff members achieved, despite the health crisis, with the shared objective to work towards a reliable and competitive communications environment for everyone.



Axel Desmedt
Member of the Council

Jack Hamande
Member of the Council



Luc Vanfleteren
Member of the Council

Michel Van Bellinghen
Chairman of the Council



2020: key figures

On 14 July 2020, the BIPT granted temporary user rights in the 3600-3800 MHz frequency band to five operators: Cegeka, Entropia, Orange, Proximus and Telenet. These user rights allow these operators to carry out the first 5G developments within this frequency band in Belgium.



5

52%



The Covid-19 pandemic has had a significant impact on the use of electronic communications services. We particularly noticed a 52% increase in the fixed broadband traffic compared to 2019..

218

The BIPT could count on its 218 staff members to carry out its missions in 2020. Thanks to their work, the BIPT was able to complete the projects of the 2020 operational plan, arising from the strategic plan 2020-2022.

2020



375

Parcel lockers have been installed in 375 postal locations, and are generally available 24/7 for sending and/or receiving parcels. This deployment responds to the sharp increase in the sending of parcels over the past years, amplified by the health crisis.

2020 in a nutshell



CHAPTER 3

2020 in numbers. This chapter describes the main trends observed by the BIPT on the electronic communications, postal service and media markets. The BIPT closely monitors the market developments and published detailed information: the postal observatory reflects the postal market trends, and the situation on the electronic communications and television market is the subject of an annual study, published as a communication of the BIPT.

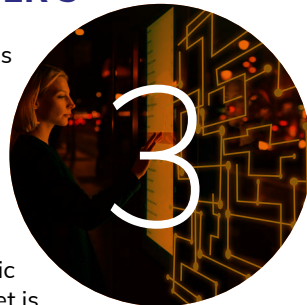


CHAPTER 2

Realisation of the strategic objectives in 2020. The implementation of the BIPT's strategic objectives is based on four strategic axes: competition, users, scarce resources and efficient functioning. This chapter explains how the four strategic axes were translated into action via the 2020 operational plan and the day-to-day operation of the BIPT.

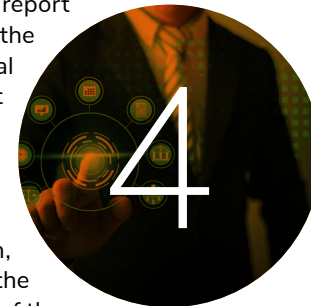
CHAPTER 3

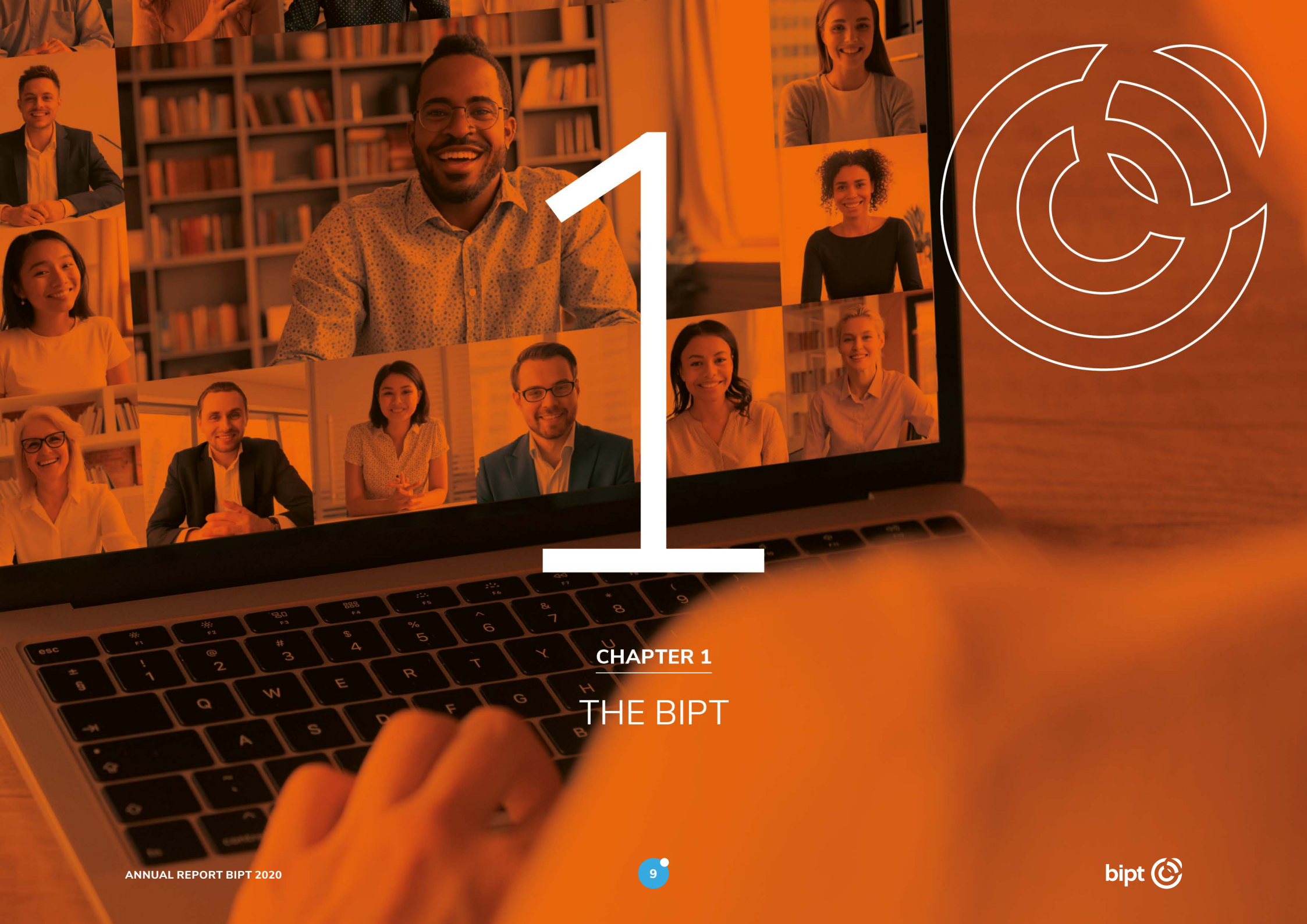
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ANNEXES

Additional information. In addition to a financial report and the annual accounts of the funds for the universal services, the annual report must include an overview of the infringement proceedings initiated. You will find this information and other relevant information, such as an overview of the implementation of the cards of the operational plan, in the annexes.





1

CHAPTER 1

THE BIPT

1.1. Status

Established in 1991, the Belgian Institute for Postal Services and Telecommunications (BIPT) is the federal regulator for the postal and telecommunications sectors.

The Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors bestowed upon the BIPT its independence. The BIPT is financially autonomous and is financed from contributions of the regulated sector players.

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 serves as a basis for the annual operational plans;
- Each year, the BIPT publishes a report on its activities and the developments in the postal service and telecommunications markets for the stakeholders;
- The BIPT'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.

An independent
regulator
subject to
a democratic control

1.2. Powers

1.2.1. Legal power

The BIPT has several duties:

- **regulator of the postal and electronic communications markets.** The BIPT carries out the tasks laid down by law and monitors the compliance with the legislation on postal services and telecommunications;
- **manager of the electromagnetic radio frequency spectrum.** The BIPT distributes the radio frequencies and numbers in such a way as to guarantee that they are used as efficiently as possible. The BIPT also fulfils a role of "police of the radio waves" to put a stop to any form of harmful interference;

- **media regulator in the Brussels-Capital Region.** The BIPT ensures that the operators comply with the specific regulation on radio and television broadcasting, provided that the activities of the broadcasting body cannot be specifically related to the French Community nor the Flemish Community.

The CRC. The BIPT is also a member of the "Conference of telecommunications and media

regulators" (CRC) which also includes the CSA ("Conseil supérieur de l'Audiovisuel"), the Medienrat and the VRM ("Vlaamse Regulator voor de Media"). Each draft decision of the BIPT on electronic communications networks is submitted to the other three authorities. Each of them may request that the draft decision be brought before the CRC, if a regulator considers that its competences are harmed by the draft¹.

In performing its duties, the BIPT may:

- Take administrative decisions and impose administrative sanctions;
- Issue opinions on its own initiative or at the request of the Minister or the Chamber of Representatives;
- Conduct studies, gather all useful information or organise a public consultation;
- Act as a mediator in case of disputes.

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.

1.2. Powers

1.2.2. Expertise

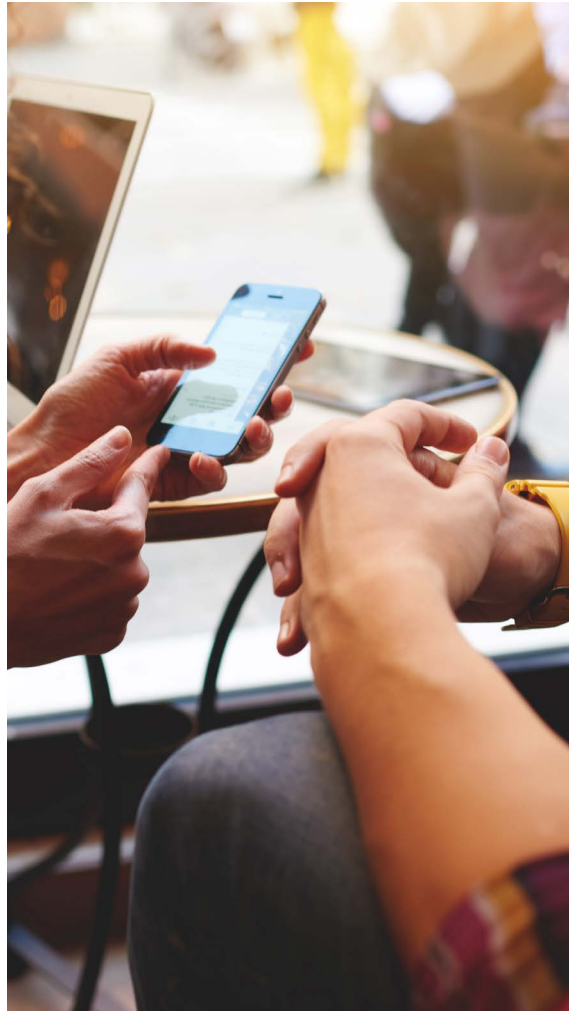
Based on its experience and its contacts with the telecommunications and postal markets, the BIPT can provide a substantial and valuable input on the preparation of the strategy. Here are a few examples:

Preparing the regulation. The purpose of the European Electronic Communications Code is to review the regulatory framework for electronic communications. The BIPT provided its expertise within the framework of the draft bill transposing this directive, and organised a public consultation on the matter.

To ensure the security of fifth-generation mobile networks (5G) and, at the request of the National Security Council, the BIPT participated in the preparation of the legal framework for the implementation of specific security measures for mobile networks.

Following the “La Quadrature du Net” judgement² of the CJEU of 6 October 2020 (C-511/18, C-512/18 and C-520/18), the BIPT coordinated the activities of a working group with a view to (i) determine the impact of this judgement on the rules regarding the retention of traffic and location data and (ii) draft an act amending the provisions concerned of the Act of 13 June 2005 on electronic communications.

The new Audiovisual Media Services Directive (AVMSD) aims at creating a level playing field in Europe for broadcasting and audiovisual media services. As the media regulator for the Brussels-Capital Region (for



content that is not exclusively in French nor exclusively in Dutch), the BIPT prepared the draft bill transposing this directive. To that end, the Act of 5 May 2017 regarding audiovisual media services in the bilingual Brussels-Capital Region was amended, particularly to take account of the new uses in terms of audiovisual content consumption, including the video platforms³.

Concerning the postal sector, the Act of 26 January 2018 on postal services (hereafter the “Postal Act”) came into force on 10 February 2018. Right before it came into force, the BIPT conducted an in-depth analysis of the secondary postal regulation with a view, among other things, to adapting its content (i) to the content of the postal Act (ii) following new practices that have emerged concerning the provision of postal products and services. Based on the results of its analysis, the BIPT prepared a draft Royal Decree on postal services that the BIPT sent to the Minister for Postal services, Petra De Sutter⁴.

Monitoring networks and information systems. As soon as the authorities implemented the first lockdown measures, the BIPT made its expertise available to the crisis centre and policy makers in order to be able to optimally absorb the sudden overutilisation of the electronic communications networks. The intervention of the BIPT allowed to detect potential congestion problems and thus to implement preventive measures.

2. The judgement rejects the principle of the French, Belgian and British rules imposing on operators to retain and transmit user data in an “indiscriminate” manner, particularly for counterterrorism purposes.

3. Directive 2010/2018/EU of the European Parliament and of the Council of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in view of changing market realities, OJEU 2018, L 303/69.

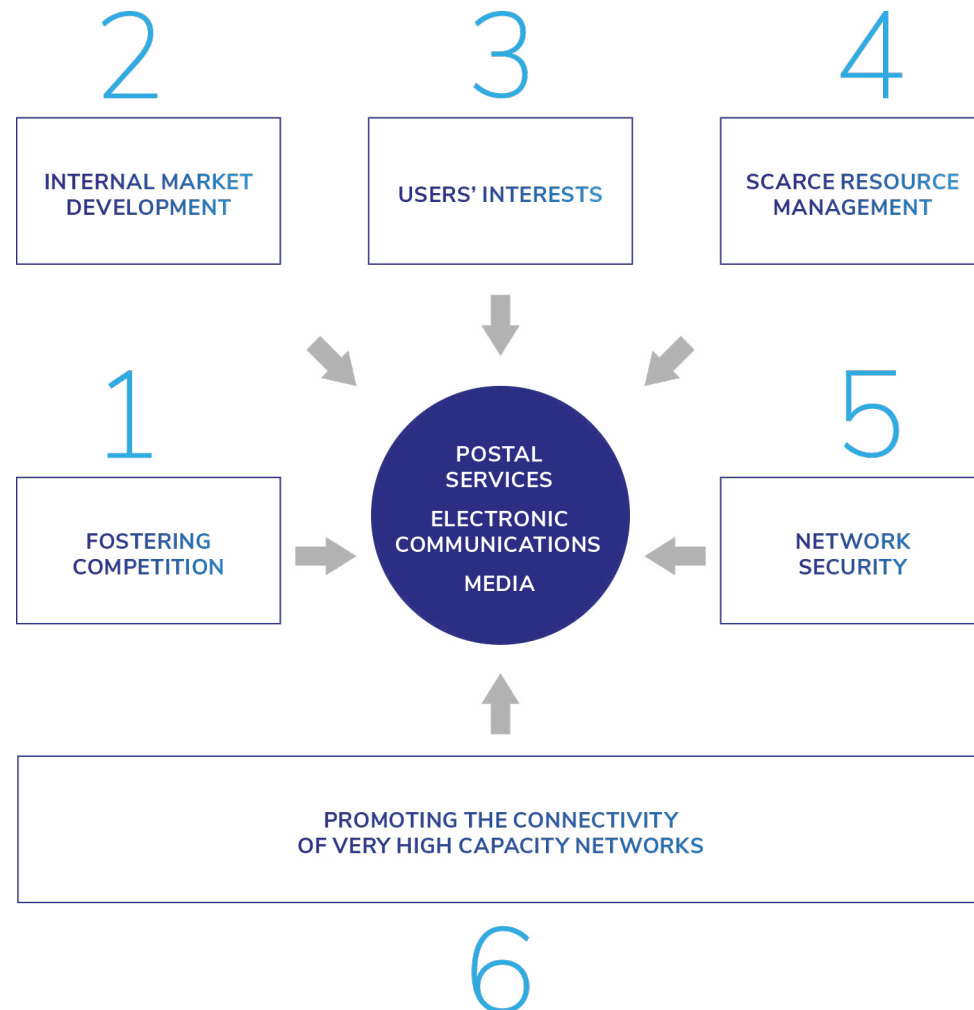
4. This draft Royal Decree was the subject, at the request of the Minister for Postal services, Petra De Sutter, of a public consultation, via the website of the BIPT, from 19 February 2021 to 23 March 2021.

1.3. Objectives

In its several fields of competence (electronic communications market, postal market, electromagnetic spectrum of radio frequencies and network security), the BIPT must reach a series of objectives which mainly directly stem from the European and Belgian regulatory frameworks.

To achieve these objectives, the BIPT draws up a strategic plan every three years. This plan outlines the strategic axes and priority fields of activity of the BIPT, contributing to the good administration of the BIPT. Established after having consulted with the stakeholders, this plan also reflects the experience of the BIPT and its response to the developments of its operating environment.

On 24 December 2019, the BIPT published its strategic plan for the years 2020 to 2022. When preparing the Strategic Plan 2020-2022, it was decided to continue on the same course to a large extent, compared with the previous plan. The organisation's missions and values remained largely unchanged as well as the strategic axes along which the different strategic goals have been distributed. Only the text regarding the vision has been completely overhauled in order to represent briefly but powerfully what the BIPT stands for.



1.3. Objectives

MISSIONS

Electronic communications, postal services and media in the Brussels-Capital Region are the BIPT's main fields of activity. The BIPT's activities are guided by six missions:

- understanding the end-users of electronic communications and postal services, anticipating the uses and development thereof and safeguarding consumer interests;
- efficiently organising healthy competition and maintaining market access;
- using postal services and electronic communications to promote social integration and cohesion for everyone;
- managing scarce resources;
- ensuring network security;
- promoting connectivity with high-capacity networks and access to them.

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 minister(s),

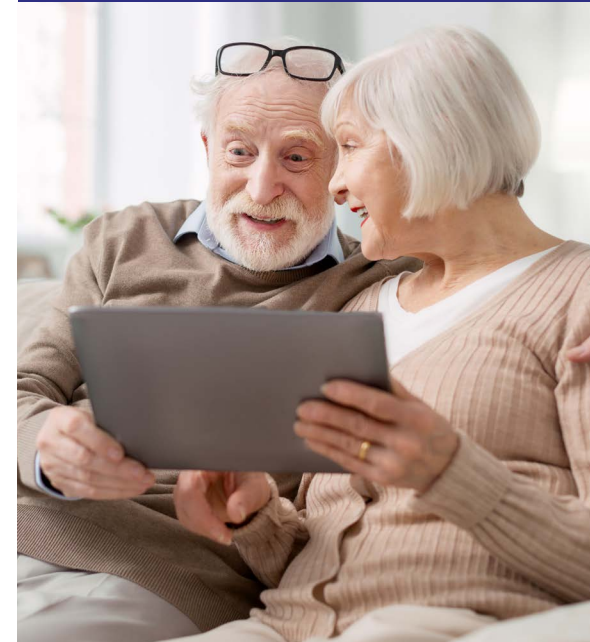
the Parliament, the companies in the sectors regulated by the BIPT, and the other public bodies and stakeholders. These contacts are desirable, and even often necessary to ensure a functioning that is attuned to the developments in society and the regulated markets, on the one hand, and stable and predictable, on the other hand. The BIPT must therefore make sure to defend and preserve its independence. From that perspective, the specific status and the financial autonomy are the best guarantees.

- **Reliability:** as an expertise centre, the BIPT wishes, when adopting a stance, to embody a reliable and competent partner for all stakeholders. This reliability is internally supported by the professionalism, teamwork and agility of the BIPT;
- **Transparency:** this is part of the control 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. As a consequence, decisions are duly motivated. They are often subjected to a prior consultation.

VISION

In its vision the BIPT summarises as follows what it aspires to create and what its beliefs are in the field of electronic communications, media and postal services:

“A reliable and competitive communications environment for everyone”



1.4. The BIPT on the European and international stage

The national regulation of electronic communications and postal services is broadly determined by the beacons set out at the European level. The BIPT's active participation as a national regulator within the European organisations concerned is therefore of great importance to cast a light on the specific national circumstances.

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

1.4.1. The BIPT's European activities as a regulator

BEREC and the ERGP

BEREC

The Body of European Regulators for Electronic Communications or BEREC was established by a European Regulation⁵. In the context of its activities, BEREC must reach the goals set in the European regulatory framework for telecommunications. In particular, BEREC contributes to the development and better functioning of the internal market for electronic communications networks and services, by aiming to ensure a consistent application of the EU regulatory framework. BEREC performs its tasks in collaboration with the national regulatory authorities (NRAs) and the European Commission. It must improve cooperation among NRAs but also between the NRAs and the European Commission.

As we all know, the year 2020 was marked by the Covid-19 crisis, which has had an impact on the functioning of BEREC. This institution assumed a coordinating role concerning the measures NRAs should take at the national level, to ensure the monitoring of the continuity of broadband networks, which proved to be of critical importance for teleworking and the use of online services.

In 2020, the BIPT participated in four plenary meetings and actively followed the various working groups within BEREC. BEREC paid particular attention, within the working groups, to the development of guidelines which must be implemented by the NRAs in pursuance of the European Code. In 2020, the work led for instance to the publication of BEREC guidelines on very high capacity networks.

On 19 October 2020, the 8th BEREC Stakeholder Forum happened virtually, the main theme being the regulation of digital platforms. Stakeholders also had the opportunity to exchange views on BEREC's draft programme for 2021 and on the future technological developments in the digital sector.

In 2019, Michel Van Bellinghen, Chairmain of the BIPT Council, was elected BEREC Chair for 2021. This meant that the BIPT had to perform, as of 2020, certain tasks linked to its future chairmanship, such as the preparation and approval of the new strategy 2021-2025, the preparation of the work programme 2021 and the follow-up of budget issues and personnel issues for the BEREC Office in 2020.

The ERGP

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

In 2020, the BIPT participated in two plenary meetings and five working groups of the ERGP (the themes being "Regulatory Framework", "Regulatory Tools", "Access Regulation", "Consumer and Market Indicators" and "Cross-border parcel delivery"). The working group "Consumer and Market Indicators" is led by the BIPT and the Polish regulator, UKE. The working group "Access Regulation" is led by the BIPT and the Lithuanian regulator, RTT. In 2020, the group "Consumer and Market Indicators" published three ERGP external reports, including the important report on Key Consumer Issues as well as the reports on key indicators related to the development of the European postal market (figures for 2019).

The IRG and CERP

IRG

The Independent Regulators Group gathers 37 telecom regulators. 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. In 2020, the IRG organised a two-day workshop, which was attended by the BIPT, on platform regulation and telecom NRAs.

5. Regulation (EC) No 1211/2009 of the European Parliament and of the Council of 25 November 2009 establishing the Body of European Regulators for Electronic Communications (BEREC) and the Office.

1.4. The BIPT on the European and international stage

CERP

The European Committee for Postal Regulation (“Comité européen de régulation postale”) or CERP ensures a good coordination between its members and seeks to promote the fulfilling the “acquis communautaire”. The BIPT acts as a regulator for the postal sector. Among other things, the BIPT attended the digital plenary meeting during which the leadership of the CERP was elected. The BIPT was appointed to chair the competent electoral board for these elections. The main tasks of the CERP included the European preparation of the Plenipotentiary Conference of the Universal Postal Union (UPU), which was supposed to take place in 2020, but was postponed in August 2021, due to the Covid-19 crisis, and the European preparation of the biannual meetings of the UPU.

1.4.2. The BIPT as the representative of the Belgian State

Specialist organisations of the United Nations

ITU

The International Telecommunication Union or ITU is the worldwide authority for information and communications technologies.

The Covid-19 pandemic has also had a considerable impact on the functioning of the ITU. A number of planned conferences have been postponed to 2021, including the World Telecommunication Development Conference and the World Telecommunication Standardization Assembly.

A number of events were also organised virtually. The participation in the Global Symposium for Regulators (GSR) was important for the BIPT. Michel Van Bellinghen attended several events within the framework of the GSR during the summer period, all impacted by the Covid-19 pandemic and addressing the role of the NRAs concerning the monitoring of broadband networks, which appeared to be essential for teleworking, online services and e-health. Michel Van Bellinghen chaired the meeting of the regulatory associations of 31 August 2020.

UPU

The Universal Postal Union or UPU supervises, among other things, the international postal exchange.

In 2020, the BIPT continued to exercise its four-year term (2017-2020) as a member of the Council of Administration of the UPU and, particularly, the cochairmanship of the Committee “USO, Regulatory Affairs and Postal Regulation”. In 2020, this committee mainly prepared drafts on the postal regulation for the UPU Congress of August 2020 in Abidjan (Côte d’Ivoire). However, due to the pandemic, the Plenipotentiary Congress of the UPU could not take place. It has been postponed to August 2021.

The BIPT and the Kenyan regulator are both co-chairs of Committee 2 “Universal Service Obligation, Regulatory Affairs and Postal Regulation” of the UPU Council of Administration, which is dedicated to the universal service and postal regulation. Two sessions of this committee were organised in 2020 under the chairmanship of the Belgian and Kenyan regulators.

By the end of 2019, Belgium (the BIPT) and Kenya were requested to chair the specific working group “Opening up the UPU to wider postal stakeholders”. In this context, the BIPT and the Kenyan regulator organised several virtual meetings of the working group, in order to prepare a proposition on the further opening of the UPU for the following UPU Congress. The working group drew up a report, but at the end of 2020, the UPU Council of Administration invited it to continue its work, in order to present a concrete proposal at the next UPU Congress in 2021.

1.4. The BIPT on the European and international stage

European Commission

COCOM

The Communications Committee assists the Commission 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 the five meetings of the COCOM.

PDC

The Postal Directive Committee is the postal counterpart of the COCOM. The BIPT follows the work of this committee and attended both of last year's meetings. As a co-chair of the ERGP working group "Market Indicators", the BIPT explained in detail the studies carried out by this working group. Furthermore, the BIPT gave presentations on the work of the UPU in general and, more particularly, on the work of the UPU working group dedicated to "Opening up the UPU to wider postal stakeholders".

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 taking into account the aim for a harmonised use of spectrum within Europe, the RSPG's and RSC's activities within the European Commission's Directorate-General "Connect" are followed from up close by the BIPT. If need be deliberations with the communities (who are in charge of broadcasting) are organised for the RSC and RSPG activities. The RSC gathers in the Commission's offices in Brussels four times a year⁶ while the RSPG's plenary meeting assembles three times a year. In 2020, the RSPG published one report and two opinions⁷. The RSC's activities in 2020 resulted in the adoption of four implementing decisions of the European Commission⁸.

TCAM

The Telecommunications Conformity Assessment and Market Surveillance Committee is an expert group regarding radio equipment in which the BIPT represents Belgium.



6. As soon as required due to the pandemic in 2020, the meetings were organised remotely.

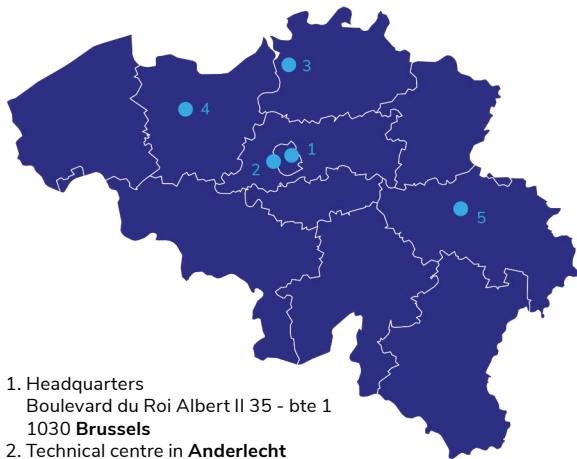
7. RSPG Report on the result of the ITU-R World Radiocommunication Conference 2019, 9 June 2020 (RSPG20-022 FINAL); First Input of the Radio Spectrum Policy Group to the "Connectivity Special Group", 4 December 2020 (RSPG20-039 FINAL); RSPG & BEREK Position Paper on spectrum-related EMF issues, 9 October 2020

8. Commission Implementing Decision (EU) 2020/590 of 24 April 2020 amending Decision (EU) 2019/784 as regards an update of relevant technical conditions applicable to the 24,25-27,5 GHz frequency band; Commission Implementing Decision (EU) 2020/667 of 6 May 2020 amending Decision 2012/688/EU as regards an update of relevant technical conditions applicable to the frequency bands 1 920-1 980 MHz and 2 110-2 170 MHz; Commission Implementing Decision (EU) 2020/636 of 8 May 2020 amending Decision 2008/477/EC as regards an update of relevant technical conditions applicable to the 2 500-2 690 MHz frequency band; Commission Implementing Decision (EU) 2020/1426 of 7 October 2020 on the harmonised use of radio spectrum in the 5 875-5 935 MHz frequency band for safety-related applications of intelligent transport systems (ITS) and repealing Decision 2008/671/EC.

1.5. Organisation

The BIPT is run by the Council, made up of a chairman and three members.

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) and six vertical departments (the Telecom Market & Media Department, the Monitoring Department, the NetSec Department, the Assignments Department, the Consumer Department and the Postal Market Department).



1. Headquarters
Boulevard du Roi Albert II 35 - bte 1
1030 **Brussels**
2. Technical centre in **Anderlecht**
3. Technical centre in **Antwerp**
4. Technical centre in **Ghent**
5. Technical centre in **Liège**



1.6. A better informed consumer

The rebranding efforts which started in 2018, including a new logo created in 2019, continued in 2020. The focus was put on the notoriety of certain activities of the BIPT. The insufficient use of the tools developed by the BIPT (besttariff, postal points website, ...) and the lack of knowledge of consumers regarding their rights demonstrated the fact that the BIPT and its actions were not sufficiently known by end-users. Consumer protection and information, however, take up a big share of the BIPT's tasks.

The BIPT wishes to communicate more with users and promote its tools (tariff simulator, maps, quality indicators). The purpose is to reach greater transparency and to foster consumer empowerment. To that end, we must react to current issues thanks to a greater presence on social media and by organising communication campaigns, particularly concerning our tools.

Following the introduction of the new website [Besttariff.be](https://www.besttariff.be), the BIPT launched at the end of last year an intensive media campaign on Besttariff.be, and this with a dual objective:

- Make Besttariff.be, and by extension the BIPT, known to the wider public, i.e. raising public awareness.

1.6. A better informed consumer

- Promote the use of the tool, in other words generating traffic to this tariff simulator.

Several resources were dedicated to that end. For the first time, the BIPT featured in a national television campaign. In October-November 2020, consumers were informed via six different commercials on the importance of regularly comparing one's tariff plan with the products that are available on the market and how easy it can be done with Besttariff.be. In the meantime, an online banner campaign was organised in order to promote the tariff simulator with images on websites such as 7sur7, HLN, etc. The tariff simulator was also promoted on social networks (Facebook, Twitter and YouTube) and via search engine advertising on Google.

To raise awareness among the public on various subjects related to consumption, the "BIPT family" was created in 2020: the father **Benoît**, the mother **Iza**, their son **Pablo** and their daughter **Thalia** guide users in the landscape of postal and telecommunications services. They give information on possible risks and provide practical tips. An animated explanatory video was created concerning:

- The Easy Switch procedure to switch fixed operators;
- The use of Postalpoint.be;
- The dangers of non-compliant radio equipment and how to identify it;

- The preservation of the e-mail address when changing operators;
- The bill shock or warning messages when exceeding the data allowance.

The Easy Switch procedure was already published last year on the BIPT's website to promote the use of the procedure and explain how it works. The five animations will also be part of a social media campaign in 2021.

The videos on Besttariff.be and animations are available on the BIPT's [YouTube channel](#).



The tools of the BIPT

www.besttariff.be

www.postalpoint.be

www.bipt-data.be

2



CHAPTER 2

THE REALISATION OF OUR STRATEGIC OBJECTIVES IN 2020

2.1. Competition

The BIPT's strategic objectives directly stem from our strategic axes, i.e. competition, users, scarce resources and efficient functioning. They serve as a guideline for the activities of the BIPT.

The strategic objectives are specified in a three-year strategic plan. End 2019, the BIPT published its new strategic plan for the years 2020 to 2022. 2020 was the first year for the implementation of this plan, its concrete realisation being precisely described in the cards of the annual operational plans.

This chapter includes the concrete actions that were taken, in addition to the daily operations of the BIPT, to achieve the strategic objectives. It gives an overview of the execution of the 2020 Operational Plan.

Healthy competition for the provision of electronic communications networks and services and postal services undeniably benefits the economic development. However, from a wider perspective, it is essential to reach the objective of social well-being: it is more important than ever that citizens benefit from an offer of electronic communications services, media and postal services which is diversified, qualitative and available at competitive prices.

The BIPT monitors the development of competition based on quality, price or innovation in the electronic communications, postal services and media sectors. Naturally, competition in the media market is regulated

in close cooperation with the media regulators of the communities.

2.1.1. Market analysis promoting competition and investments

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 its geographical size is determined.

Operators with a 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 SMP 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).

Pursuant to the 2014 Recommendation of the European Commission⁹, the BIPT analyses the following markets:

- **Market 1** : fixed call termination. This is the service charged by a fixed telephony operator to another (fixed/mobile) operator when it terminates a call on the fixed geographical numbers, 078 numbers or emergency numbers;

- **Market 2** : mobile call termination. This is the service any mobile operator may charge for the termination of a mobile call on its own numbers;
- **Market 3** : broadband markets. Depending on the interconnection point, two forms of wholesale broadband services are distinguished¹⁰: the wholesale market for local access (market 3a) and the wholesale market for central access (market 3b);
- **Market 4** : wholesale high-quality access provided at a fixed location. This concerns the inputs that are necessary, for instance, to connect large companies or the base stations of mobile networks.

In addition to the markets identified by the European Commission, the BIPT also analyses the wholesale broadcasting service market. These services are necessary for new entrants to propose bundles including broadband services and broadcasting services (multiple play packs).

No market analysis was carried out in 2020, the previous market analyses being relatively recent:

The fixed and mobile termination markets had been reviewed in 2018 and 2017 respectively.

The broadband and broadcasting service markets had been reviewed via a series of decisions adopted on 29 June 2018.

9. Ranking according to the Commission Recommendation of 9 October 2014 on relevant product and service markets within the electronic communications sector susceptible to ex ante regulation in accordance with Directive 2002/21/EC of the European Parliament and of the Council on a common regulatory framework for electronic communications networks and services, OJEU of 11/10/2014, No L295/79. In 2020, the European Commission adopted a new recommendation on the subject according to which only the former markets 3a and 4 are likely to be the subject of an ex ante regulation.

10. In other words: the sale of broadband services to other operators.

2.1. Competition

The market for wholesale high-quality access provided at a fixed location (the current market 4) was analysed in the decision of 13 December 2019.

In 2020, the BIPT regularly monitored the different markets and the implementation of the previously adopted decisions

2.1.2. Control and validation of the reference offers

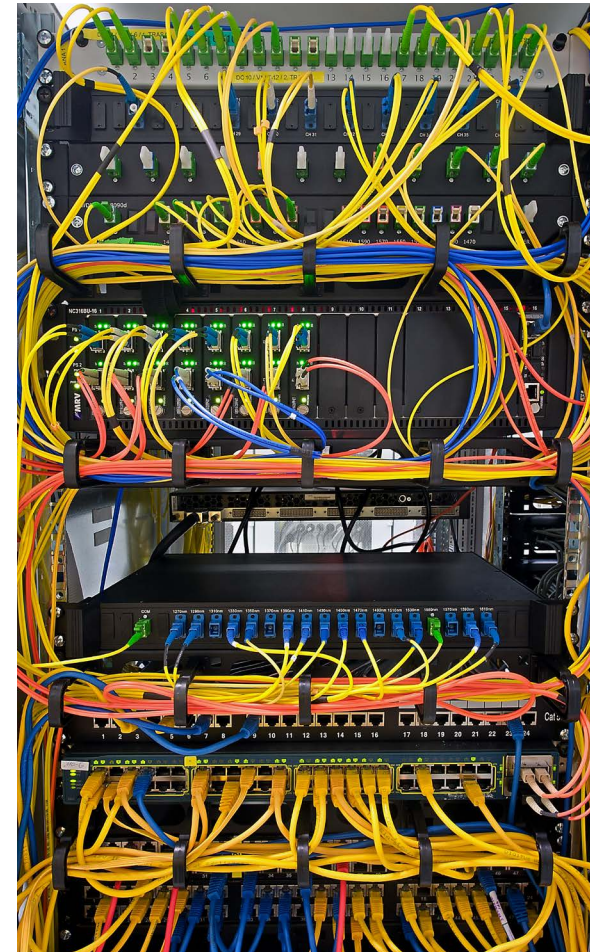
The obligation of transparency consists in requiring SMP operators to publish certain accounting, technical or tariff information. When the regulator imposes this obligation¹¹, SMP operators must create a reference offer which will serve as a basis to grant other operators access to their infrastructure. This is particularly the case for markets 3 and 4. 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 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 2.1.1., new obligations have been placed upon SMP operators. In 2020, the BIPT continued to control the proper and timely implementation of these obligations, including the necessary amendments to the reference offers.

In 2020, the BIPT examined several reference offers of Proximus:

- **Proximus' VoIP¹² interconnexion reference offer** (also called "PRIO"): the BIPT finally approved this offer on 1 September 2020. This decision lays down the amendments Proximus must make to its reference offer. It was accompanied by a communication, also dated 1 September 2020, specifying the obligations in terms of IP interconnexion placed upon SMP operators in the mobile termination market.

Balanced reference offers for increased competition on the wholesale market



11. Pursuant to Article 59 of the Act of 13 June 2005 on electronic communications

12. "VoIP" stands for "Voice over IP", or the transportation of voice through electronic communications networks using the Internet protocol.

2.1. Competition



- The analysis of Proximus' reference offer for unbundled¹³ and bitstream access¹⁴ to the copper local loop was completed in the decision of 25 March 2020. The new offers are based on important modifications to the existing reference offers, mainly linked to changes in Proximus' IT systems. This decision concerns the following reference offers of Proximus:
 - 1) BRUO: "Belgacom Reference Unbundling Offer", this regards the unbundled access to the local copper loop;
- New or modified reference offers for virtual local unbundling, multicast¹⁵ 0 and bitstream through fibre from Proximus have to be submitted to the BIPT within 6 months after the publication, in conformity with the CRC Decision of 29 June 2018 regarding the analysis of the broadband and television broadcasting markets. The analysis of these reference offers was completed in the decision of 28 April 2020. The main obligations imposed on Proximus by this decision are linked to the Basic SLAs.

- 2) Bitstream xDSL: , this regards bitstream access to the local copper loop. It regards the former "BROBA" (Belgacom Reference Offer Bitstream Access for ADSL/SDSL access) and "WBA VDSL2"(Wholesale Broadband Access VDSL2 for VDSL access). The new version of the reference offer for bitstream access to the copper local loop is now named "Bitstream xDSL" and thus replaces the two former offers: "BROBA" and "WBA VDSL2".

The main obligations imposed on Proximus by this decision are to make available the Service ID and to modify the parameters "Basic SLA First Time Right" and "Basic SLA Repair".

Cable operators' reference offers. In the Decision of 29 June 2018 on the analysis of the broadband and broadcasting markets, the Conference of Regulators of the electronic communications sector (CRC) judged that the operators had a significant market power on the market for central access and the wholesale market for access to broadcasting, resulting in a series of additional measures being imposed upon them, among which the drafting of a reference offer. Early 2019, the BIPT organised three preliminary consultations regarding the reference offers for bitstream access and the resale of television services of the cable operators Brutélé, VOO SA and Telenet. The remarks that had been received were implemented in a formal draft decision which was submitted for consultation from 14 April to 26 May 2020. On 18 December 2020, the Belgian Competition Authority was consulted concerning this draft decision.

13. Local loop unbundling enables the provision of electronic communications services through the copper pair ensuring the connection between the user and Proximus's local exchanges.

14. Bitstream access enables the provision of electronic communications services from a central access point, through Proximus's network or that of the cable operators.

15. "Multicast" is the functionality for the provision of digital television.

2.1. Competition

2.1.3. 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 can adapt or modify the way in which these tariffs are calculated in order to guarantee that this method corresponds with the operational and financial reality of an efficient operator.

One-time fees. In 2019, the one-time fees of the BRUO and the Bitstream xDSL reference offers of Proximus were adapted. At the same time, the monthly ISLA repair rental fee was reviewed¹⁶. The consultation of the relevant draft decision was organised in June-July 2019. The final rates of these one-time fees were set by the decision of 30 June 2020. It was also decided in this decision to transform the Small Network Adaptation fee in a monthly supplement. On 11 September 2020, an application was brought by edpnet against the introduction of the monthly supplement. The decision was annulled based on this point by the judgement of the Court of Appeal of 23 December 2020.

Concerning the one-time fees and the monthly rental fee "SLA Pro Repair" on the coaxial network, a draft decision was submitted to the sector on 8 October 2020. The consultation on the matter ended on 12 November 2020.

Monthly fees for cable access. The cable operators' reference offer regards, among other things, the rates for central access to the cable networks and the access to the cable operators' digital and analogue television offer. Following a public consultation in 2019, a decision setting these monthly fees was adopted on 26 May 2020. Two significant changes were made to the draft decisions submitted for public consultation. On the one hand, the model values the entire network (including fully depreciated assets which are still in use), given the European objective to promote investment in very high capacity networks. On the other hand, the tiering, i.e. movement in prices according to the speed, was also accentuated to allow price differentiation on the retail markets. Even though current costs are taken into account, increased tiering makes it possible to have, in the wholesale markets, cable access prices that are lower than the previous prices.

Monthly fees for access to Proximus' FTTH network. The BIPT further adapted the created cost models which were submitted for public consultation the year before. A draft decision was submitted for public consultation from 30 September to 30 October 2020. In this draft decision, the BIPT proposed to validate

the access prices applied by Proximus (the prices for the transportation of traffic must be the subject of a subsequent general review). A final decision should be taken during the 1st quarter of 2021.

2.1.4. More accessible information for candidate operators

In order to help candidate operators enter the Belgian market, a vade mecum was created and published on 16 December under the section "operators" of the BIPT website (under "Becoming a telecom operator in Belgium"). This vade mecum includes an administrative and legal part (an overview of a series of important rights and duties for an operator) and a part concerning the market analysis (with more information on the existing reference offers). It also provides a practical overview of the possible costs and contributions. This information must allow operators to prepare their entry on the Belgian market in a better and quicker way.

16. "ISLA Repair" stands for "Improved SLA (ISLA) Repair". Alternative operators subscribing to a broadband access offer can use this option. In exchange for the payment of a monthly rental fee, the alternative operator can benefit from a swifter service in the case of a technical failure. Concretely, in the draft decision the BIPT, in addition to the monthly ISLA Repair rental fee, aims at reviewing Proximus's rates for the following activities: activation of a new line; migration of an existing line; SNA costs ("SNA" stands for "small network adaptation" - costs charged if the activation of a broadband access service requires the installation of a new physical connection with the Proximus access network); "Useless End-user visit" (a specific rate charged when the Proximus technician called on the end-user in vain for a reason why Proximus is not responsible, such as an absent customer) and "Wrongful Repair Request" (if the alternative operator detects a problem with the broadband access services he provides to his customers and submits a ticket with Proximus following which it is established that the cause does not fall under the responsibility of Proximus).

2.1. Competition

2.1.5. Market surveillance in the postal and telecommunications sectors

Postal observatory. The postal observatory was brought into being to add to the knowledge regarding the market and to follow the developments in the postal sector by means of intelligible diagrams (www.bipt.be/operators/evolution-of-revenuein-the-postal-sector). It represents the postal sector by means of economic data such as market shares, data regarding employment and investments, volumes, revenue... The information dates back to 2010 and documents the

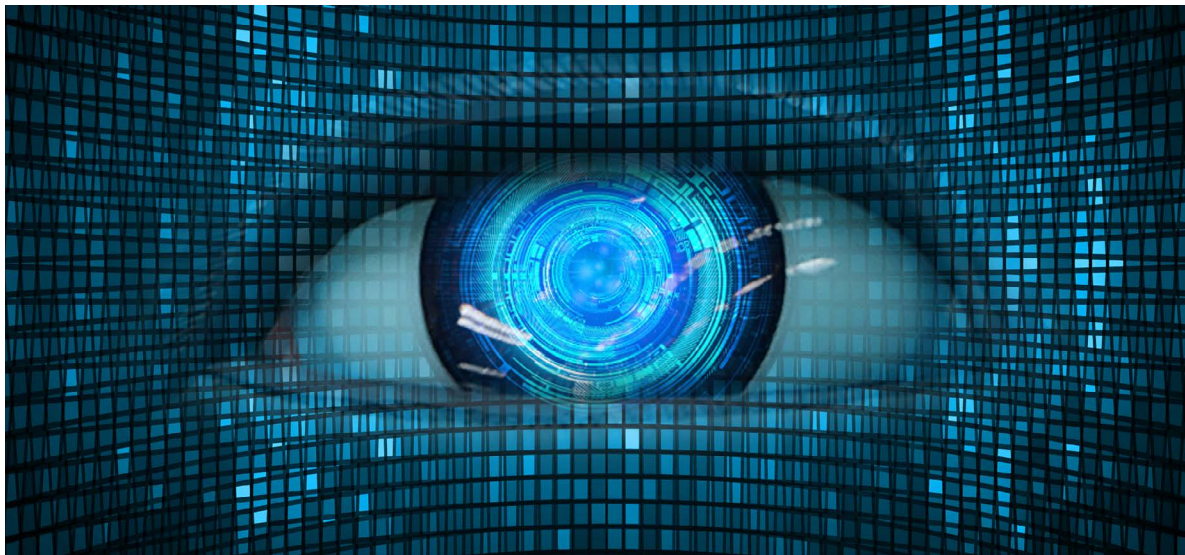
market evolution by means of reliable data (see 3.2.1.). The postal observatory regarding the postal activities of 2019 was published on 23 October 2020¹⁷.

Net neutrality. The fourth edition of the annual report on the supervision of net neutrality was published on 30 June 2020. This report fits in with the monitoring of compliance with Regulation 2015/2120. The report covers the period from 1 May 2019 to 30 April 2020. Covid-19 had a particular impact on the activities of the BIPT regarding net neutrality, especially at the end of that period. Before the coming into force of the

measures taken by the Belgian government, the BIPT had organised periodic discussions with the main operators within the sector and the reporting by the latter, so that operators are ready to continue the provision of their Internet access services, despite the new circumstances. Fortunately, this was confirmed in practice.

No cases of service or application blocking in the network were found. As for the end-user choice, the mobile data volumes included in the ISP offers increased once again, in order to meet the changes in the mobile data traffic. Various unlimited tariffs were also introduced in the market.

Concerning the zero rating of the Epic tariff plan, the opening of the platform, which was decided during the previous reporting period, yielded concrete results: the music streaming app of Tomorrowland, Audiomack (also music streaming) and Tiktok were added to Proximus' tariff plans Epic beats and Epic Combo. Concerning the (albeit temporary) offer of "Fun Passes" by Orange Belgium, the BIPT concluded that, after analysing the data obtained, there was insufficient commercial room available for the competing content and application providers and that the procedure for access to the zero-rating platform was insufficiently developed. Orange Belgium will therefore have to formulate a proposal meeting the BIPT's concerns upon the new launch of a "Fun Pass".



17. <https://www.bipt.be/operators/publication/communication-of-16-october-2029-regarding-the-belgian-postal-services-observatory-for-2019>

2.1. Competition

Partnership agreements on infrastructure. We have noticed a certain cooperation trend among operators to respond to the challenges raised by the deployment of very high capacity networks. In Belgium, this trend translated into a mobile infrastructure sharing agreement between Proximus and Orange. As regards fixed infrastructure, Proximus concluded partnership agreements with EQT Infrastructure, on the one hand, and with Eurofiber, on the other hand, in order to further deploy optical fibre, in Flanders and Wallonia respectively. Similar discussions were announced between Telenet and the energy distributor Fluvius. Whenever necessary, the BIPT works closely with the Belgian or European competition authorities and provides them with its expertise so that agreements concluded by operators preserve the conditions for effective and sustainable competition.

Telecommunications prices. In November 2020, the BIPT published a national benchmarking of the electronic communications services rates based on standard consumption profiles. For each of these profiles, a corresponding chart compares the cheapest tariff plan of operators or service providers meeting the minimum requirements. The results reflect the market situation at the time of the “snapshot” based on the tariff plans activated in the tariff simulator www.besttariff.be, with and without the effect of promotions. Furthermore, additional information allows consumers to understand the content of the various offers presented (type of pack, Internet volume and

speed, data volume, add-on and promotion).

The purpose of that exercise is to improve the readability, understanding and comparison of telecommunications offers available on the Belgian residential market for specific profiles for the public at large and therefore to increase global transparency on the market.

These services and profiles are regularly evaluated to take account of the developments on the market.

A new type of bundles has appeared on the market to meet the changing needs of consumers, particularly in terms of mobile and television access services. This concerns family bundles allowing to integrate more than one mobile subscription, or bundles with a mobile subscription in the form of a “common data pool” to be shared among several members of a family. This sixth edition of the national price benchmarking is taking this type of bundles for the first time into account through four new profiles: two profiles including two mobile usages; two profiles including three usages.

Besides these new services, this study allows consumers to compare tariffs meeting standard profiles which were defined for the following services: mobile services, fixed Internet, fixed telephony, 2-play bundles (fixed Internet and TV, fixed telephony and TV), 3-play bundles (fixed triple play & mobile triple play) and standard 4-play bundles (i.e. fixed telephony, fixed Internet,

mobile telephony and TV).

Universal telecommunications service. In its Communication of 22 December 2020 regarding the monitoring of the universal telecommunications service 2020, the BIPT concluded that the removal of the universal service obligations concerning payphones, universal directories and directory enquiry services did not have a significant impact on the level of protection afforded to end-users within the framework of the universal service. The fact that no provider is designated to provide the geographical element of the universal service did not have a demonstrable impact on the availability, the price level and the quality of the services in question. Nevertheless, it was pointed out that the speed for functional Internet access – currently established at 1 Mbps, every day of the year, all hours of the day, except during maximum one hour per day – will have to be reviewed following the transposition of the European Code. The communication also provides information on the granting of the social tariff. In this regard, the BIPT published on 9 September 2020 an opinion on the bill No. 0642/001 on the reform of social tariffs and, mainly, making the granting automatic. The BIPT describes in this opinion the current social tariff system and comments this bill.



Protecting the users'
interests and promoting
social inclusion

2.2. Users

2.1.6. Supporting an innovative postal service

E-commerce from a postal perspective. Regulation (EU) 2018/644 of the European Parliament and the Council of 18 April 2018 on cross-border parcel delivery services aims at further supporting intra Union e-commerce, by increasing transparency in the tariffs for certain cross-border parcel delivery services and their assessment. The BIPT plays an important role in achieving the goals of the Regulation. In the first place, the BIPT has to gather the information determined in the Regulation, from the parcel delivery service providers.

In addition, based on the Regulation, the BIPT analyses the universal service provider's pricing (bpost) in order to identify possible unreasonably high tariffs. The BIPT noticed a mismatch between the margins presented by bpost and the margins calculated by the BIPT¹⁸. In this respect, the BIPT will proceed to a more detailed examination of the cost distribution in bpost's analytical accounting.

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 to the BIPT for approval each year and per category (universal service, public service or commercial product/

service). The BIPT then informs the accounting audit commissioner of the universal service provider of its approval. The analysis conducted in 2020 regarding the listing and classification of products and services provided by the universal service provider for the year 2019 was finalised in the Decision of 26 January 2021.

At the same time, the work carried out in 2020 concerning the separated analytical accounts was completed via a decision (of 26 January 2021 as well) on bpost's analytical accounting for 2017 and 2018. For 2017, as for 2016, the BIPT issued a non-conformity decision. Concerning the analytical accounting of 2018, bpost had made changes, upon request of the BIPT, to the distribution of "historic" personnel cost overruns, on the one hand, and the Ombudsman's contribution, on the other hand. A conformity decision was then taken for 2018.

Net cost of bpost. Each year, the BIPT verifies the calculation of the net cost of bpost's universal service obligations, pursuant to 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 scenario). In this context, the BIPT also conducted a study assessing the intangible benefits associated with the provision of the universal service. bpost did not submit a compensation request for a possible net cost of the universal service for 2018 and 2019.

2.2. Users

Protecting the user's interests is an important mission that must be highlighted for BIPT. The availability of high-quality postal and electronic communications services at a competitive price is crucial for users. Ensuring social inclusion is also more important than ever. However, the BIPT must also make sure that users can access the innovative technologies and services available on all networks. To that end, the BIPT must face the corresponding challenges, such as the protection of privacy or compatibility with its equipment.

2.2.1. The informed consumer can compare and choose

To ensure that users can really take advantage of a wide range of postal and 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 are provided with transparent information. The purpose is to ensure a reliable environment to guarantee user confidence.

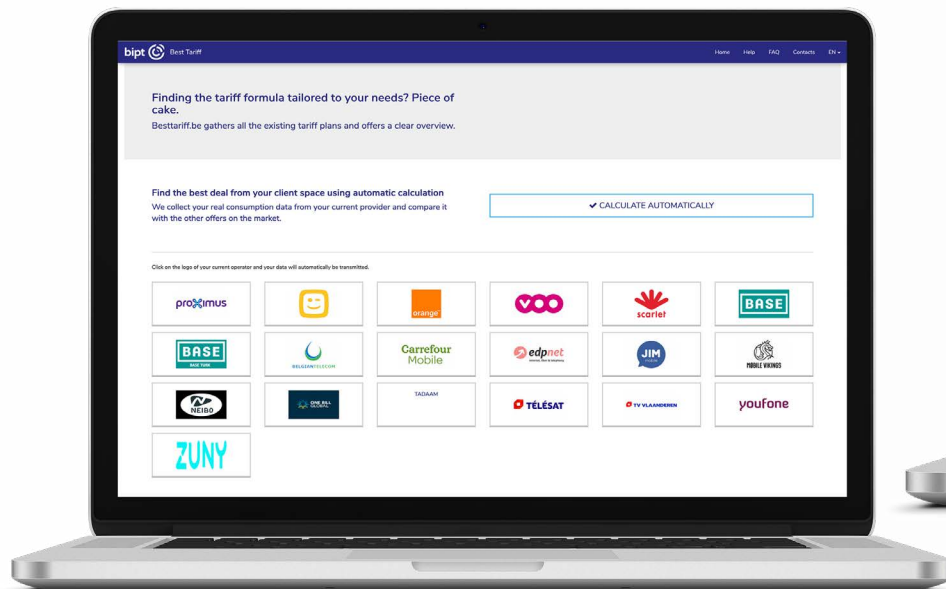
18. Communication of the BIPT Council of 1 September 2020 regarding the assessment of the bpost tariffs considered within the framework of the European regulation on cross-border parcel delivery services

2.2. Users

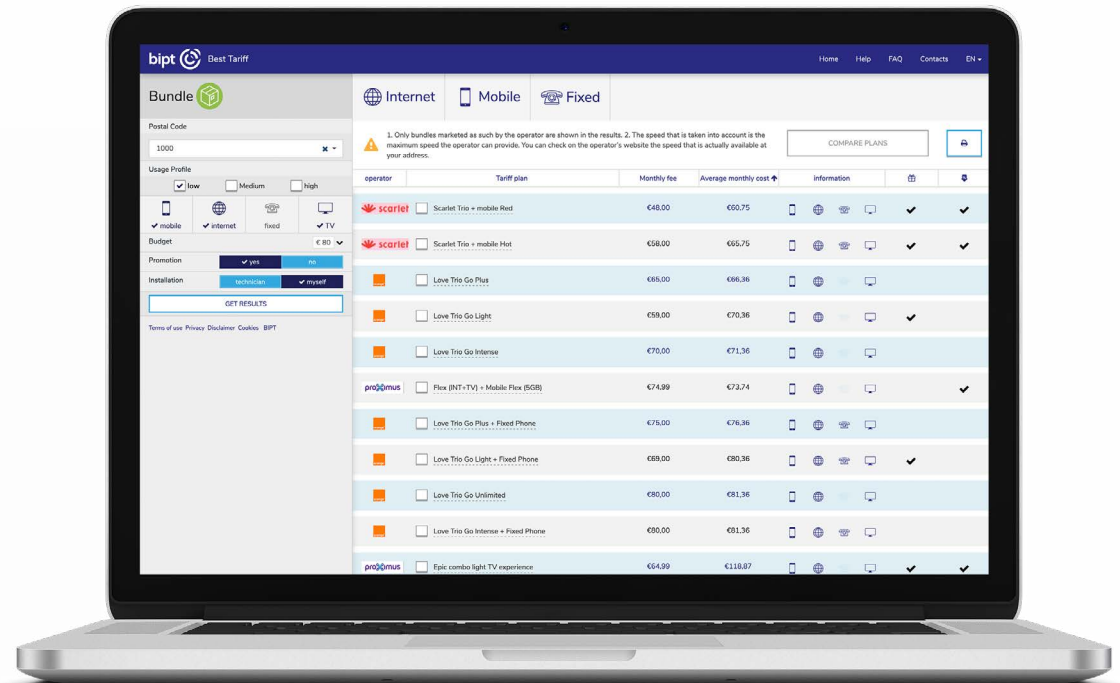
Besttariff. This site contains all tariff plans of electronic communications operators active on the Belgian residential market. The tariffs of the commercialised offers for mobile and fixed telephony and Internet, as well as for bundles, are compared in an objective manner. This way, the consumer can find the most advantageous tariff plan corresponding to his or her

consumption or needs. To simplify the use of the tariff comparison tool even further, it was decided last year to add the option of the automated calculation: the user data, available in the operator's customer page, are automatically transferred to the fields of the tariff simulator. The "bundles" module has been adapted as well in order to allow the comparison of "family" bundles

including multiple SIM cards. The renewed tariff comparison tool was made available early April 2020. The algorithms supporting the various new functionalities are regularly controlled.



An automated calculation uses the actual consumption data.
www.besttariff.be/#/home



The results clearly show the alternatives.
www.besttariff.be/#/home

2.2. Users

Provision of data on network quality. In 2020, the BIPT updated its data portal www.bipt-data.be/en. This portal includes qualitative data helping users choose an operator, such as coverage maps of the mobile and fixed networks, statistical indicators and user metrics allowing to assess the quality of experience on the Belgian mobile telephony networks, or a quality barometer giving, via various indicators, an overview of the performance of the different providers.

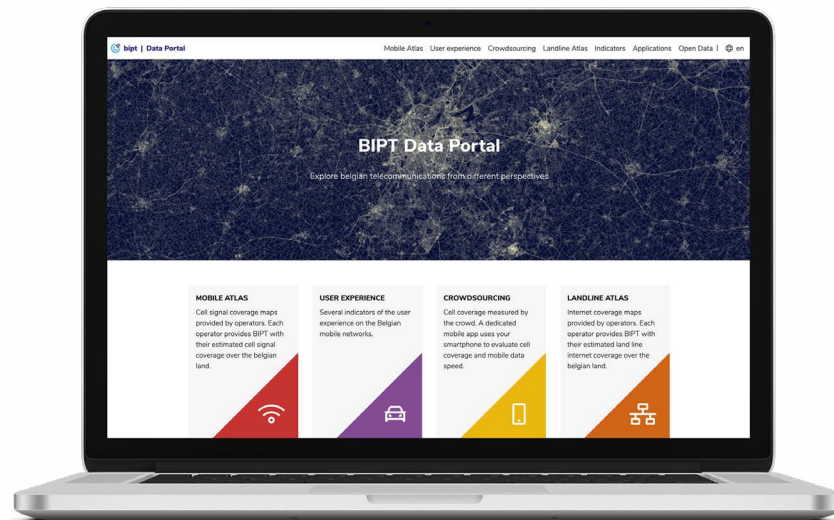
In 2020, the BIPT updated its mobile coverage maps and started to update the fixed coverage maps,

following the methodology recently developed by BEREC. The data of the quality barometer were also updated. Furthermore, the BIPT led a campaign to measure the quality of experience, with a view to enabling a comparison of the quality of the various operators.

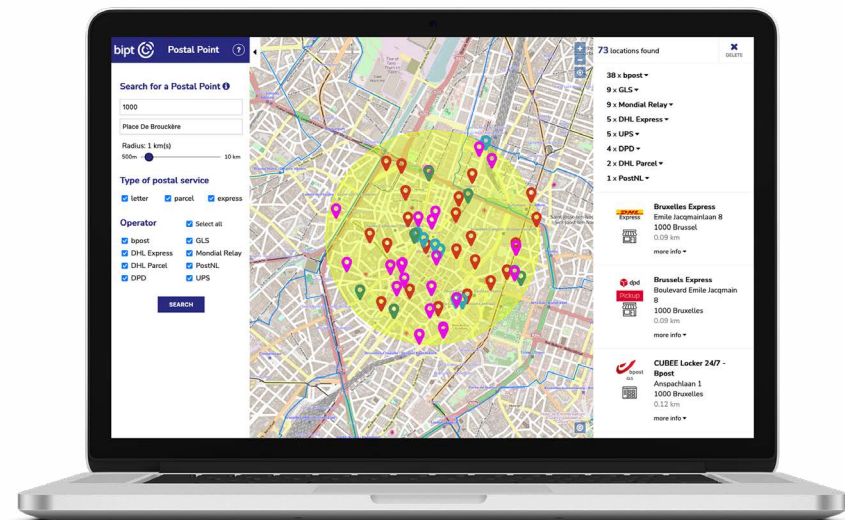
To improve the importance and relevance of the data that are available on the portal, the BIPT participated in the launch of several initiatives, including the “sentinel trucks” project, which consists in installing sensors measuring network quality on garbage trucks.

In the meantime, the BIPT initiated discussions with several players collecting or which may collect data on network quality.

Postal point. The BIPT’s website postalpoint.be contains an overview of all staffed points, letterboxes and parcel lockers in Belgium. The tool also allows to follow the network development from up close (see 3.2.3.). In 2020, preparatory work was done to further develop this tool in 2021 and further increase its visibility. To that end, a social media campaign has been ongoing since early 2021.



www.bipt-data.be/en

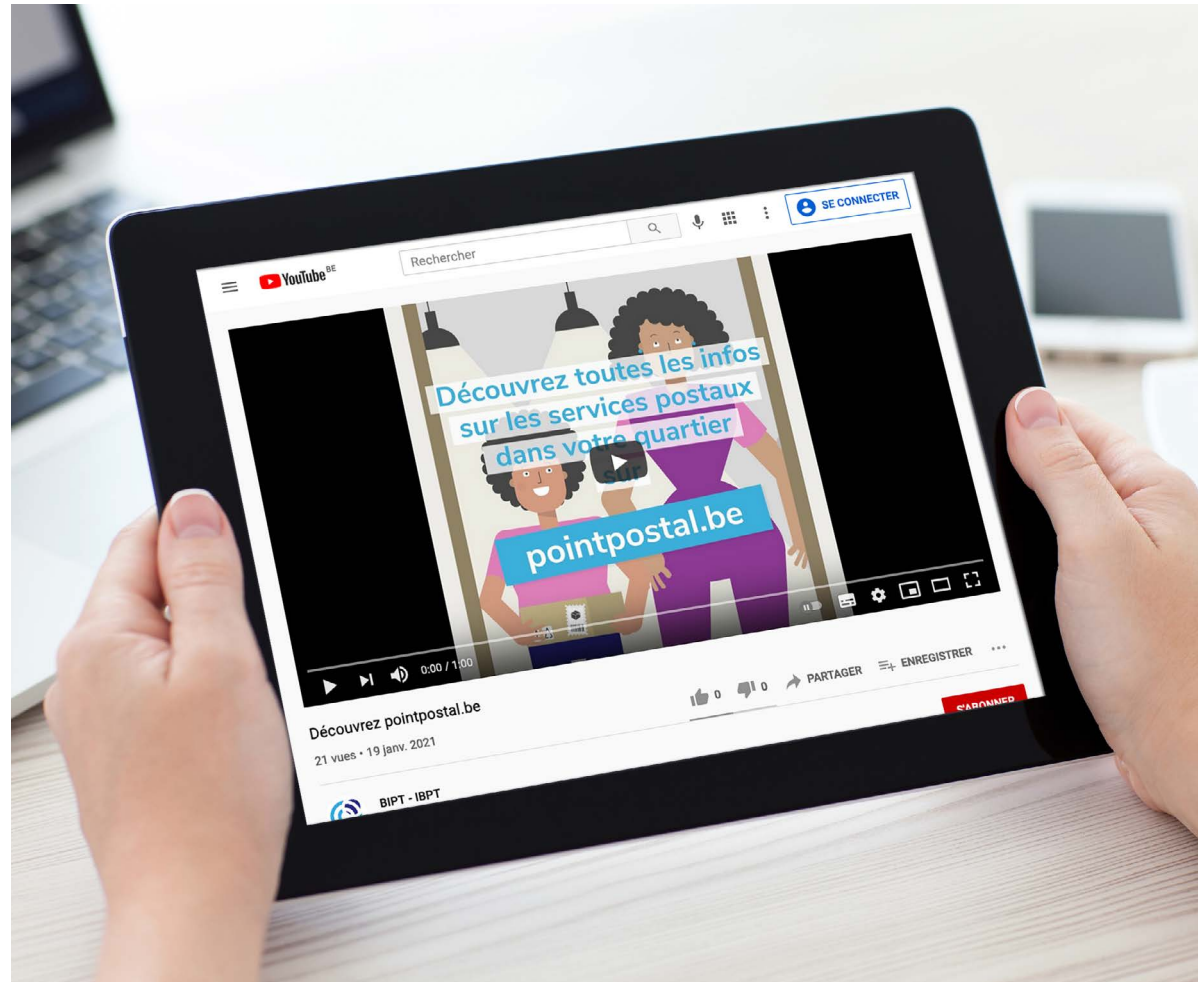


www.postalpoint.be/

2.2. Users

Tariff comparisons. The BIPT, in collaboration with the postal operators subject to the cross-border regulation¹⁹, developed a methodology to further enrich the existing information of the European Commission on domestic and cross-border mail and present them to the consumer. This methodology was refined, in consultation with the operators, by the end of 2020 and will be launched during the first half of 2021 with updated data. Small users will then be able to see more quickly and clearly the wealth of postal services offered.

Increasing consumer awareness and offer transparency



[Find the BIPT's commercial spot here](#)

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

2.2. Users

2.2.2. Ensuring a reliable environment

Society is becoming more and more dependent on digital communication. However, even if the virtualisation and virtualisation offer more and more possibilities, they involve a higher level of complexity. It is therefore important to ensure that networks are reliably secured and managed. This applies especially to critical telecom infrastructure and the essential services that are provided on it and must remain available, for they constitute the backbone of our digital society.

The reliability of electronic communications services must be guaranteed for users, including in terms of privacy. The BIPT also verifies the reliability of the information provided by the operators to the users in order to guarantee a reliable environment.

Security incidents. Telecom operators inform the BIPT of security incidents with a considerable impact on their networks and services. At the beginning of the year, the BIPT carried out an aggregated analysis of the notifications received and sent the annual incident report to the European Commission and ENISA (European Union Agency for Cybersecurity).

After consultation with the sector and other authorities, the BIPT explained to the operators of essential services within the digital infrastructure sector which incidents must absolutely be notified within the

framework of the NIS Act.

Operators must conduct risk analyses for the purpose of network safety and, based on that, take appropriate measures to limit the risks²⁰. In cooperation with the Luxembourg regulator (the ILR or “Institut luxembourgeois de régulation”), an online platform where operators can carry out their risk analyses has been made available. This platform was presented to the stakeholders from July to September, during a public consultation.

Specific monitoring during the health crisis. From the very start of the coronavirus crisis, the BIPT has made and maintained close contact with the operators, the crisis centre and the policy makers in order to address the sudden change in the use of telecommunications. It was a priority for the BIPT to ensure that the population could benefit from the best possible connection. By following up networks (daily, then weekly), potential problems were detected and avoided in time. Preventive measures were developed with the operators, should a congestion happen. The BIPT had also had contacts with the gaming and streaming sector in order to mitigate their impact on the use of the internet, if need be, and avert network congestion.

The BIPT paid special attention to the interconnection capacity among operators and, in consultation with the education sector, non-essential network maintenance

work was postponed after the exam period, to reduce the impact on education to a minimum.

Mobile network security. Given the importance of being able to rely on secure and reliable infrastructure, work was undertaken at the EU level with regard to securing 5G. In that context, a 5G toolbox²¹ was published. Its purpose is to propose solutions concerning potential risks linked to the cybersecurity of fifth generation networks. Pursuant to this toolbox, the BIPT participated in the drafting of a draft bill and a draft Royal Decree which were submitted for consultation on 2 December 2020, at the request of the Minister of Telecommunications.

Inspection of critical infrastructures During the Covid-19 crisis, it appeared once again that telecommunications networks are of paramount importance for public security and, as national critical infrastructures, require a high level of security. In cooperation with the National Crisis Centre, the BIPT established a renovation project for the identification process of national critical infrastructures. The operators of infrastructure which can be identified as critical infrastructure were consulted.

Combating fraud. In 2020 as well, the BIPT received various notifications of wangiri scams and phishing. In the case of wangiri fraud, the user receives a very short call from an unknown foreign number. In reality, this is an expensive premium rate number. If you call

20. Article 114, §1, subparagraph 1, of the Act of 13 June 2005 on electronic communications provides that each telecommunication operator shall take appropriate technical and organisational measures to manage the risks posed to security of networks and services. Having regard to the state of the art, these measures shall ensure a level of security appropriate to the risk presented. Article 20 of the Act of 7 April 2019 laying down a framework for the security of networks and information systems of general interest for public safety lays down the following: “The operator of essential services shall take appropriate and proportionate technical and organisational measures to manage the risks posed to the security of the networks and information systems upon which its essential services depend. These measures ensure, for the network and information systems, a level of physical and logical security appropriate to the existing risks, taking account of the latest technical expertise. The operator shall also take appropriate measures to prevent incidents compromising the security of network and information systems used for the provision of these essential services or to limit their impact, in order to ensure the continuity of these services.”

21. CG Publication 01/2020: Cybersecurity of 5G networks EU Toolbox of risk mitigating measures.

2.2. Users



The critical infrastructures and the essential services provided through them are the backbone of our digital society.

back, you will pay tens of euro of calling fees. Phishing does not only entail online scams through messages or websites. Sometimes victims are contacted by telephone or receive a text message fishing for personal data such as a user name, password, credit card numbers, etc. for improper use.

Through a non-stop process, the BIPT receives notifications of fraud by the operators, which it shares with the other operators allowing them to block these numbers as well. Over the full year 2020, a total of 736 notifications were received (a single notification may include multiple telephone numbers) and most of the reported numbers were blocked.

2.2. Users

Due to the explosion of smishing²² in November 2020, often associated with the pandemic, the BIPT launched a collaboration with the banking sector and the prosecutor's office to make it easier to identify and sanction perpetrators in the future.

Switch-off plan. In 2020, the BIPT continued to monitor the consequences of a possible electricity shortage. The switch-off plan's activation has indeed a direct impact on electronic communications possibly resulting in an interruption of, among other things, the telephone service. In 2020, the BIPT took measurements throughout the entire country to identify the impact of a blackout in specific areas on the coverage of mobile telephony networks.



22. Phishing activity via SMS.

2.2. Users

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

Postal market consumer study. The BIPT regularly carries out studies regarding the postal users. In the past, the BIPT opted for a quantitative study based on a statistical survey (this was carried out in 2006, 2009, 2013 and 2015) or a qualitative study (in 2016), to identify consumer needs that possibly changed and certain trends. In 2020, both approaches were combined. A tender was issued for a mixed method research strategy mapping out not only the consumer behaviour but also the perception, the preferences and the needs of postal users for the different segments of the Belgian postal market. The study bureau Ipsos was selected. The study includes a qualitative part with focus groups and face-to-face interviews and a quantitative part (statistically representative survey). A comprehensive report shall be issued by the first quarter of 2021 at the latest.

Elasticity study regarding postal products. In March 2016, the BIPT carried out a first elasticity study to analyse how changes in price or delivery frequency

influenced consumer behaviour in the postal sector. This information is essential to the BIPT for the verification of the viability of the universal service and indispensable for the annual verification of a potential net cost resulting from the provision of the universal service. To be able to take into account the sector's evolution and changed user preferences, a new elasticity study was conducted in 2019. This study being conceived in a broader sense than the first study. In 2019, the interviews with private persons, self-employed persons, SMEs, large enterprises and public services were complemented by a literary study and input was also asked from the operators bpost, PostNL and TBC Post. In 2020, an econometric study, based on a series of data from bpost, was added. A non-confidential communication concerning these studies will be published in the first half of 2021.

Electronic communications: consumer study. In 2020, the BIPT continued examining the functioning of the electronic communications market and published the results of its annual survey on the users' perception of the Belgian electronic communications market. The results were based on more than 5,000 questionnaires aiming at investigating their behaviour and were published on 22 September 2020. This edition revealed that, for the first time, telephony services over the internet (57%) exceeded the usage of traditional fixed telephony (53%).

Whereas users traditionally choose their operators

mainly based on the attractive price of the bundle (47%), the fact that they are regular customers of the operator (34%), the interesting content of the bundle (29%), there are now new criteria such as the operator's reputation, the quality of service or the connection speed.

In relation to previous years, we observe the same trends: the use of the television over the internet (35%) and television/video on demand (32%) continues to rise.

The overall satisfaction towards telecom rates and product quality remains stable and satisfactory. The switching of operators also remains stable.

However, too many consumers still lack sufficient knowledge of their rights.

Use of Internet
telephony now exceeds
that of fixed telephony

2.2. Users

2.2.4. 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”²³ This directive ensures that the equipment complies with the essential health and safety requirements and does not cause harmful interference.

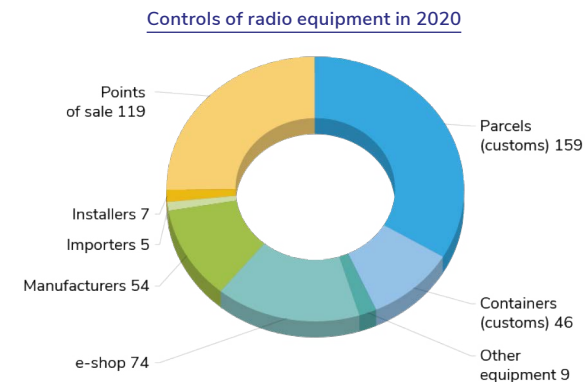
In order to increase the compliance of radio equipment placed on the Belgian market, the EquiTel department of the BIPT performs regular controls of Belgian and foreign economic operators.

These controls revealed that communication should be strengthened regarding the regulation and the role of the BIPT, particularly amongst small distributors and merchant associations, despite the distribution of information leaflets.

Even if information could be distributed during fairs and exhibitions in early 2020, the subsequent health context did not allow for information sessions with the Belgian trade associations.

Since the first lockdown, activities have been re-focused on (Belgian and foreign) e-commerce websites that are active on the Belgian market. These were subject to a control campaign, and an awareness campaign to reduce the distribution of non-compliant

equipment on the Belgian market by these players. In 2020, 74 e-shops were inspected.



The BIPT also performs controls on manufacturers, importers and distributors, but also on border posts (in collaboration with customs) regarding radio equipment. 18,834 pieces of equipment were blocked at the border in 2020 (import of containers, postal parcels, e-commerce, etc.).

Due to the pandemic, numerous controls in the field could not be performed. Consequently, the focus of the controls performed by the BIPT was put on e-commerce. To that end, the BIPT has investigating officers who, under the authority of the public prosecutor, can perform all sorts of investigative

actions as well as searches. Goods may also be seized as a result. In 2020, these actions resulted in 140 reports, for a total of 232 seized products.

Inspections
to increase
the compliance
of radio
equipment

23. Directive 2014/53/EU of the European Parliament and of the Council of 16 April 2014 on the harmonisation of the laws of the Member States relating to the making available on the market of radio equipment and repealing Directive 1999/5/EC.

2.2. Users

2.2.5. Monitoring of the compliance with the operators' obligations

The regulator is responsible for the monitoring of the observance of the regulatory framework regarding the protection of users on the electronic communications, media and postal services markets. This monitoring is essential to ensure a reliable communications environment for users.

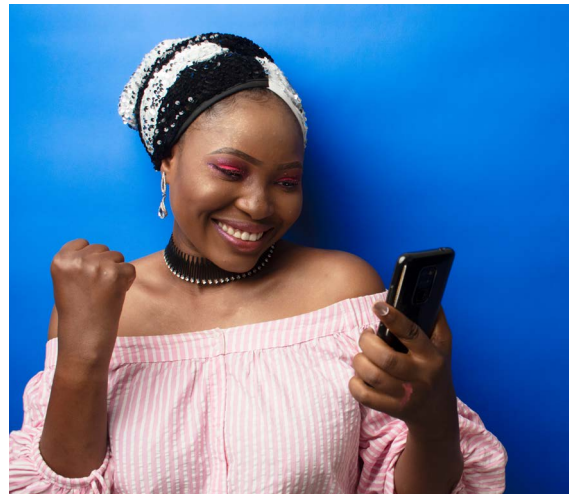
Compliance with the postal regulatory framework.

In conformity with the postal regulatory framework, the BIPT each year carries out a number of inspection missions, mainly involving the universal service.

In its Decision of 20 August 2020 on monitoring mail delivery times for the year 2019, the BIPT observes that the quality of domestic priority single piece mail reached 95.8% that year. This means that bpost reached the quality standard of 93%²⁴ in 2019. This is the best result over the last ten years. The quality of domestic non-priority single piece mail reached 99% in 2019. This is the sixth-best result over the last ten years. On 1 January 2020, bpost introduced a new distribution model: (i) priority single piece mail (J+1) and (ii) non-priority single piece mail (J+3). The good result of domestic priority single piece mail may be due in part to the fact that consumers prefer non-priority single-piece mail. As a result, the volume of priority single piece mail from 2019 is much lower than before 2019.

bpost prices. The universal postal service's rates need to be affordable, cost-oriented, non-discriminatory and transparent. The tariff increase of the services belonging to the small users basket²⁵ is approved by the BIPT beforehand.

As regards the 2021 tariff increases for these services, the BIPT Decision of 22 September 2020 concluded that the 2021 tariff changes comply with the current legislation. Since 2018, however, the BIPT has been stating that the renewed postal legislation is failing in order to guarantee an effective monitoring of the cost orientation principle.



Mobile telephony - Roaming. As of 15 June 2017, the "Roam Like at Home" system applies, prohibiting operators from charging surcharges for roaming services within the European Economic Area²⁶ (EEA). Consumers travelling within one of these countries can consequently enjoy the same rate as in Belgium for the mobile services. In 2020, the BIPT followed up the application of the Roam Like at Home regulation, particularly concerning the application of the fair use policies by the operators.

Mobile telephony - International communications.

Since 15 May 2019, international communications, i.e. outgoing calls and text messages originating in Belgium, are subject to a European regulation²⁷. This text provides for a number of measures, including maximum rates. The BIPT is in charge of the enforcement and monitoring of this regulation and as such followed up its implementation in 2020.

Fixed telephony, fixed Internet and/or television - Switching operators.

The Easy Switch procedure²⁸, facilitates the switch to another provider of fixed Internet and/or television, as well as switching providers of bundles: the new operator takes care of the switch unless the user explicitly indicates not wanting this. The purpose of the procedure is twofold: preventing users from facing an administrative burden and removing problems such as double billing. In 2020, the BIPT carried out monitoring activities and the

24. Set in Article 34, 2°, of the Royal Decree of 11 January 2006 implementing Title IV (Reform of the Postal Authorities) of the Act of 21 March 1991 on the reform of certain economic public companies.

25. The small users 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.

26. European Economic Area: in addition to the 28 Member States of the European Union this also includes Iceland, Liechtenstein and Norway.

27. Article 50 of Regulation (EU) 2018/1971 of the European Parliament and of the Council of 11 December 2018 establishing the Body of European Regulators for Electronic Communications (BEREC) and the Agency for Support for BEREC (BEREC Office), amending Regulation (EU) 2015/2120 and repealing Regulation (EC), no 1211/2009.

28. Introduced by the Royal Decree of 6 September 2016 regarding the migration of fixed line services and bundles of services in the electronic communications sector.

2.2. Users

necessary updates to complete the assessment of the Easy Switch procedure, as prescribed in the regulation, and submit it to the Minister. The assessment report was published on the BIPT's website in early 2021. The BIPT makes different recommendations for operators to further reduce the administrative steps linked to the switching of operators, such as promoting Easy switch as the standard procedure to consumers and facilitating access to the data a customer must give to his/her new operator after switching operators. The BIPT also requires operators to provide it with a solution to a recurring practical problem, i.e. the lack of unequivocal evidence of a technician's intervention at the customer's location. Other improvement proposals were submitted to the Minister for consideration.

Identification of prepaid cards. Before activating a prepaid card, the end-user has to be identified. The BIPT regularly verifies whether the mobile operators comply with this obligation. On 14 January, the BIPT imposed fines on Telenet and Proximus for failing to comply with their obligations. In 2020, the BIPT checked whether operators as well as points of sales complied with the obligations on the identification of prepaid cards.



29. See Article 127, § 1, of the Act of 13 June 2005 on electronic communications: "The King lays down [...] the technical and administrative measures imposed on operators and providers referred to in Article 126, § 1, subparagraph 1, sales channels for electronic communications services, undertakings providing an identification service and end-users, to allow: [...] 2° the identification of the end-user [...]" This Article was implemented by the Royal Decree of 27 November 2016 on the identification of the end-user of mobile public electronic communications services provided by means of a prepaid card.

A woman with curly hair is looking at a laptop in a server room. The background is filled with server racks and blue lighting. A white text box is overlaid on the left side of the image.

The efficient use of
resources to foster fair
competition
and innovation

2.3. Scarce resources

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

2.3.1. Numbering plan management

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

Effective management. As the manager of the numbering plan, the BIPT has to ensure that these scarce resources are used as efficiently as possible. That is why the numbering plan needs to be regularly adapted to allow for new services and to further add on to the numbering space if necessary.

Currently, the use of the calling line identification (CLI) is facing two challenges: dishonest people and organisations who misuse the CLI deceive end-users, on the one hand, and the fact that operators wish to be able to use the CLI more flexibly, on the other hand. These developments are only partially framed

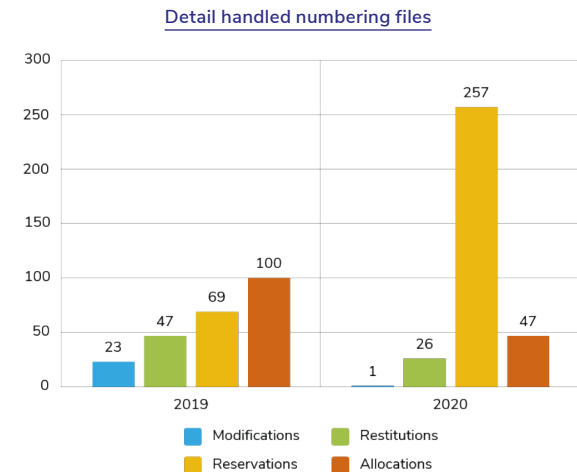
by the current regulation. In the context of the use and presentation of the CLI, the BIPT provided in 2020 greater clarity to the sector and end-users, from the moment a call is made until the moment the call is over. To that end, the BIPT drafted guidelines including four principles concerning call conveyance, the objective being to increase the reliability of the CLI.

Access to number series. The BIPT must also ensure that the operators have access to appropriate number series to support their services. That is why, in 2020, the extraterritorial use of Orange's numbering resources was authorised. Furthermore, numbering resources were allocated for testing purposes to new players with a view to offering private 5G services.

In 2020, the BIPT handled 311 numbering files, i.e. a 38% increase as compared to 2019. As indicated in the chart below, this increase is mainly due to an increase in the reservations of numbers. This mainly concerns reservations of short SMS numbers. Several of these reservations had indeed expired and had to be renewed.

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 on the operational level (information sharing, notification of cases of fraud...) as well as on the structural level (measures

via legislation and regulation). Last year, the BIPT further facilitated the functioning of this group. Measures were then taken and coordinated to put an end to fraud by sharing relevant information among the participating operators. Moreover, structural measures were taken to tackle fraud involving the use of numbers.



2.3. Scarce resources

2.3.2. Optimal radio spectrum distribution and exploitation

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

Issuing user rights. In the past, the BIPT issued user rights for 2G, 3G and 4G. The 2G and 3G licences will expire on 15 March 2021. Once the political authorities have reached an agreement, not only 2G and 3G user rights shall be put up for auction during a future multiband auction, but frequency bands assigned for 5G³⁰ shall also be made available (see 2.3.3)³¹.

Operators having obtained user rights in a certain frequency band are in principle free to decide which technology they use, but in practice certain frequency bands are mainly used for a specific technology:

Frequency band	Available bandwidth	Technology	Current licence holder	Expiry date current licence
Existing licences				
900 MHz	70 MHz	2G-3G	Proximus-Telenet Group-Orange	2021
1800 MHz	150 MHz	2G-4G	Proximus-Telenet Group-Orange	2021
2100 MHz	120 MHz	3G-4G	Proximus-Telenet Group-Orange	2021
2600 MHz	155 MHz	4G	Proximus-Telenet Group-Orange-Densair-Citymesh	2027 (for Citymesh 2035)
800 MHz	60 MHz	4G	Proximus-Telenet Group-Orange	2033
3400-3600 MHz		4G	(40 MHz Gridmax + Citymesh)	2025
Future licences				
700 MHz	60 MHz	4G-5G	/	/
3400-3800 MHz	400 MHz	4G-5G		
1400 MHz	90 MHz	4G-5G, SDL ³²	/	/

30. 5G is a standard which will lead to strongly improved mobile communications and higher mobile speeds. This will allow mobile players to develop innovative and differentiated products not yet present on the market.

31. In these frequency bands user rights will be assigned following the multiband auction:

- the bands the user rights of which will expire: 900 MHz, 1800 MHz, 2100 MHz;

- the bands for which, except for Citymesh and Gridmax in the 3600 MHz band, no user rights have been granted and that will be used for 5G: 700 MHz, 3600 MHz, 1400 MHz.

32. SDL: Supplemental downlink. Supplemental downlink implies that the frequencies allow one-way traffic from the network to the peripheral equipment and not two-way traffic.

2.3. Scarce resources

On 14 July 2020, the BIPT decided, pursuant to Article 22 of the Act of 13 June 2005 on electronic communications (ECA), to grant temporary user rights for the 3600-3640 MHz band to 4 operators (Cegeka, Orange, Proximus and Telenet). These temporary user rights are only valid until the entry into force of the user rights which will be notified by the BIPT following a future auction for the 3400-3800 MHz band. Article 49, paragraph 2, of Directive 2018/1972 of the European Parliament and of the Council of 11 December 2018 establishing the European Electronic Communications Code (hereafter the “European Electronic Communications Code”) lays down in principle a minimum validity period of 15 years for rights of use for radio spectrum. However, Article 49, paragraph 3, b), 4, sets duly justified derogations for specific short-term projects. Five applications were initially submitted, but Entropia then decided to withdraw its application. Temporary user rights allow the operators concerned to deploy as of now 5G services so that Belgium can limit its delay compared to the other EU countries.

On 18 May 2020, the BIPT decided to launch a call for applications for the granting of 4G user rights in the 2500-2690 MHz band. Early 2020, a Belgian company stated that it wished to obtain the remaining free block of 15 MHz duplex in this 2.6 GHz frequency band. Pursuant to the existing legal framework, the BIPT had to organise an auction. At the expiry of the call for applications, Citymesh was the only one who

had submitted its application. Pursuant to the Royal Decree of 22 December 2010 on radio access in the 2500-2690 MHz frequency band, the BIPT decided on 22 September 2020 to grant user rights for the 2520-2535 MHz/2640-2655 MHz band to Citymesh. These rights of use are valid from 1 October 2020 to 30 September 2035.

Due to the partnership between Citymesh, Gridmax and Cegeka, the latter decided by the end of December 2020 to waive the temporary user rights in the 3600-3800 MHz band and, almost at the same moment, Citymesh submitted a request to extend the rights of use so that the whole territory is covered by Citymesh/Gridmax with their licence in the 3410-3600 MHz band.

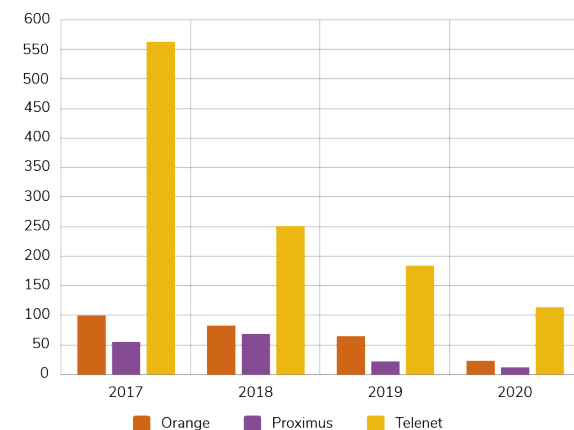
The establishment and operation of transmission installations in Belgium’s exclusive economic zone in the North Sea require temporary rights of use. The existing 2G and 3G licences of Belgian public mobile operators are only valid on the Belgian territory (not in the North Sea). Via its Decision of 27 October 2020, the BIPT granted temporary rights of use to Citymesh in the 3410-3510 MHz band for the establishment and operation of a transmission installation in Belgium’s exclusive economic zone in the North Sea.

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. It needs to send a “Letter of Intent” (or “LoI”) thereto.

Number of Letters of Intent submitted per operator



2.3. Scarce resources

As shown in the chart above, we notice that the number of Lols has been decreasing for several years now. However, this does not mean that operators share their sites less. Generally, the sharing of a site indeed lasts several years and only comes to an end when the site is dismantled, due to external events, such as the termination of the lease for the location where the site has been established.

Furthermore, operators do not necessarily submit a Lol when they wish to join an existing antenna site. If the project does not require a town planning permit, the operator directly sends a Pylon Sharing Request to the operator who owns the support structure.

The decrease in the number of Lols may also be due to a wait-and-see attitude of the mobile operators in relation to the arrival of 5G, which will require the deployment of new antennas.

The non-profit organisation RISS (Radio Infrastructure Site Sharing) ensures co-ordination between the operators involved. This organisation is monitored by the BIPT and supports the development and the use of a database of antenna sites (www.sites.bipt.be), maintained by the BIPT.

2.3.3. Continuity and innovation

With its speed and stability, the 5G network paves the way for all kinds of innovative and creative solutions

which could impact various sectors. The BIPT actively participated in the deployment of 5G in Belgium, either by granting temporary user rights, or objectifying the debate on the revenues of the auction.

Spectrum auction. The BIPT prepared a new spectrum auction. On the one hand, the radio spectrum of the existing mobile 2G and 3G licences has to be reassigned, on the other hand, new frequency bands that are suitable for the new 5G technology are also put up for auction (see 2.3.2.).

On 24 December 2019, in the context of the auction, the BIPT organised a consultation at the request of the Minister of Telecommunications, on the draft bill and three drafts of Royal Decrees regarding mobile networks. This consultation concerned:

- the possibility for the BIPT to extend the 2G and 3G licences. For the licences are valid until 15 March 2021. It is suggested to renew the existing licences until the new auction procedure is completed;
- the reorganisation of sufficiently large blocks in the 3400-3600 MHz band to facilitate the future roll-out of 5G.

This process finally resulted, after the installation of the new Federal government in October 2020, in the signature of two Royal Decrees on 3 December 2020:

- The Royal Decree of 3 December 2020 amending the Royal Decree of 7 March 1995 on the establishment and operation of GSM mobile telephone networks, and the Royal Decree of 24 October 1997 on the establishment and operation of DCS-1800 mobile telephone networks, and the Royal Decree of 18 January 2001 fixing the specifications and the procedure for granting licences for third-generation mobile telecommunications systems.
- The Royal Decree of 3 December 2020 amending the Royal Decree of 24 March 2009 on radio access in the 3410-3500/3510-3600 MHz and 10150-10300/10500-10650 MHz frequency bands.

The 2G and 3G licences were valid until 15 March 2021. There was thus a risk that the 2G (900 MHz and 1800 MHz) and 3G (2 GHz) frequency bands would no longer be assigned from that date. The BIPT was initially expected to organise an auction for the bands 900 MHz, 1800 MHz and 2 GHz in 2019 or 2020, for the period from 15 March 2021. This auction could not be held within the planned time frame due to the lack of agreement within the Consultative Committee and the resignation of the Government in December 2018 (start of the caretaker mode). Given the deadline of 15 March 2021, it then became necessary to allow the BIPT to extend, if need be, the rights of use from that date. The Royal Decree of 3 December 2020³³ allows the BIPT to extend

33. Royal Decree of 3 December 2020 amending the Royal Decree of 7 March 1995 on the establishment and operation of GSM mobile telephone networks, and the Royal Decree of 24 October 1997 on the establishment and operation of DCS-1800 mobile telephone networks, and the Royal Decree of 18 January 2001 fixing the specifications and the procedure for granting licences for third-generation mobile telecommunications systems

2.3. Scarce resources



these licences for successive periods of maximum six months. On 15 December 2020, the BIPT published a consultation on the draft decision regarding the extension of the 2G and 3G licences.

Media use. At the request of the Minister in charge, in order to support the future discussion within the Consultative Committee on the distribution of revenue from the auctioning of 5G spectrum, the BIPT examined the share of the media use in the mobile data traffic to better objectify the issue of the distribution of the auction revenue between the Federal state and the federated entities. This media study specifically verifies which part of the mobile data traffic can be considered as media use, according to the relevant legal, technical and economic characteristics. The results of this analysis were handed over in April 2020 to Minister De Backer.

2.3. Scarce resources

2.3.4. Promoting 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 all Belgian citizens and undertakings, was set in accordance with the European Code which introduced that objective.

Mobile networks saturation map. The BIPT worked on preparing a study on the risks of saturation of 4G networks in three large Belgian cities. The study, published in early 2021, assesses the saturation risk, by predicting the future network usage rates, taking account of the expected increase in traffic volume by 2022. Concretely, the purpose is to assess if there is a risk for the operators' spectrum, on average, to be saturated, everything else being equal (radiation standards, number of operators, entry of 5G, etc.). The study shows that of the three cities, Brussels shows the highest saturation risk. In Liège, the situation could be difficult in certain parts of the city. And only a few neighbourhoods of Antwerp show a medium risk of saturation.

2.3.5. 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, the BIPT may act as a "police of the radio waves" to put a stop to any form of harmful interference.

Defining the technical requirements

Radio equipment. The BIPT is in charge of defining technical regulations for the use of radio communication equipment. In this context, the BIPT published a Decision on 25 February 2020, on radio interfaces concerning short-range devices³⁴. These radio interfaces lay down the technical requirements the equipment has to meet. They enable the efficient use of the frequency bands and avoid harmful interferences. They include the technical characteristics the equipment has to meet and the frequency bands for different types of equipment³⁵. A similar Decision was published on 29 July 2020 and relates to short-range devices and PRM-446 devices³⁶.

GSM-R. GSM-R (or "GSM-Rail") is a system for railway radio communications used to ensure the mobile

telephone traffic among the railway staff. To avoid interference between GSM-R and the public mobile networks, the BIPT first adopted measures through a Decision of 30 June 2015. Given the coexistence of the public mobile networks and the GSM-R network in the 900 MHz band, the Decision of 28 July 2020 extends the validity of the Decision of 30 June 2015 until 31 December 2020, for certain railway lines. A first extension, authorised by the Decision of 29 July 2019, ran until 31 July 2020.

Ensuring access
to very high
capacity networks
for all citizens
and undertakings

34. This concerns devices with a low radiated power, which limits the range of the device. These devices operator on collective frequencies. Most of these devices may be used without any authorisation.

35. www.bipt.be/operators/radio-interface-specifications

36. www.bipt.be/operators/cb-pmr446-amateur

2.3. Scarce resources

5G. To avoid harmful interference caused by the 5G roll-out, the BIPT adopted the Decision of 29 September 2020 on the technical and operational conditions for the avoidance of harmful interference in the 3400-3600 MHz band. This Decision complies with Decision 2008/411/EC, as amended by Decisions 2014/276/EU and 2019/235/EU.

Resolve interferences

The BIPT has been assigned the task of monitoring the electromagnetic spectrum. There are 2 types of monitoring actions:

1. inspections, whether or not announced, to verify whether the spectrum is used according to the applicable rules;
2. locating interference, reported and otherwise.

These 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. The Anderlecht centre moved by the end of 2020 to a new location in the Coca-Cola building³⁷. Following the decision of liquidation and dissolution of the "Centre de contrôle des radiocommunications des services mobiles" (Monitoring Centre of the radio communications of mobile services - CCRM), of which the BIPT was a member, the latter will resume direct management of the radio spectrum monitoring.

To carry out its monitoring actions, the BIPT uses state-of-the-art equipment. Sometimes, manual measuring devices suffice to check the interference. In other cases, we use measuring vehicles or monitoring stations located in the regional technical centres of the BIPT.

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 in the licence (see 3.1.4.). The objective is twofold: avoid interference and ensure that the network operator receives a correct invoice.

In 2020, this type of monitoring could not be conducted due to the pandemic. In total, 605 preventive inspections were carried out, versus 1,010 in 2019.

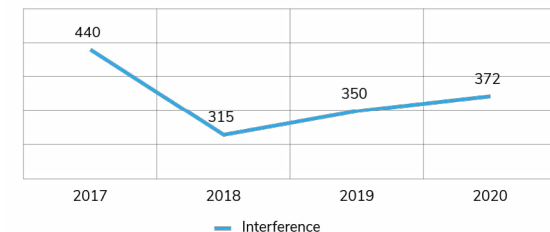
In order to be able to take measures immediately when the radio legislation is breached, the BIPT technicians have the power of a criminal investigation officer. In 2020, 27 reports were drafted in the context of the spectrum monitoring and 16 interfering transmitters were seized.

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 2020, numerous events were cancelled due to the Covid-19 crisis. However, the BIPT intervened in several major events.

Resolving interferences. Governed from its headquarters Brussels, the BIPT has four regional centres resolving interferences across the entire national territory. The total number of interferences in 2020 amounts to 372, namely a 6.29% increase compared to the previous year and an 18.10% increase compared to 2018.

Evolution of interferences



37. The staff of the control centre of Seneffe joined their colleagues of Brussels in the new control centre in Brussels.

2.3. Scarce resources

The victims and sources of interference were very diverse in 2020 as well:

Over 40% (137) of interference victims belong to the category “Land Mobile”³⁸, within which a large majority of the interferences (82%) are caused by the use of repeaters active in the 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 “Short-Range Devices”³⁹ (76 - 24%), maritime services (55 - 17%) and broadcast (30 - 9%). Aeronautical interference makes up 4% (14) of the total interferences;

Decreasing the risks of interference to a minimum and solving harmful interference for an efficient use of the spectrum

Source \ Victims	To fill in...	Aeronautical	Broadcasting	Defence Systems	Fixed Links	Land Mobile	Maritime	Meteorology	Radio Astronomy	Satellite Systems (Civil)	Short Range Devices	Non Radio	Other	Vanished	Unknown	Totals
To fill in...	-	-	-	-	-	-	-	-	-	-	-	-	-	1	1	2
Aeronautical	-	2	5	-	-	-	-	-	-	-	-	2	1	3	1	14
Broadcasting	2	-	9	-	2	-	-	-	-	-	-	1	1	12	3	30
Defence Systems	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
Fixed Links	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	1
Land Mobile	2	-	8	-	-	56	-	-	-	1	11	14	10	20	15	137
Maritime	-	-	-	-	-	-	45	-	-	-	-	1	-	6	3	55
Meteorology	-	-	-	-	-	-	-	-	-	-	4	-	1	5	-	10
Short Range Devices	-	-	1	-	-	-	-	-	-	-	29	2	5	24	15	76
Radio Astronomy	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
Satellite Systems (Civil)	-	-	-	-	-	1	-	-	-	1	-	-	-	-	1	3
Non Radio	1	-	-	-	-	-	-	-	-	-	-	1	1	1	2	6
Other	1	-	-	-	-	-	-	-	-	-	4	17	6	4	4	36
Vanished	-	-	-	-	-	-	-	-	-	-	-	-	-	1	1	2
Totals	6	2	23	0	3	57	45	0	0	2	48	38	25	77	46	372

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

39. Garage door remote controls, baby monitors, wireless doorbells, etc.

2.4. Efficient functioning

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

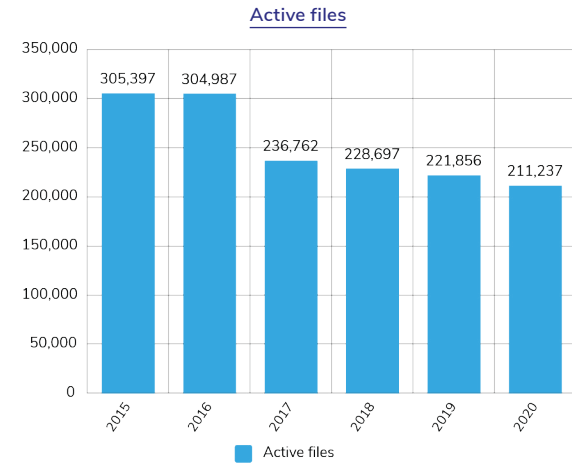
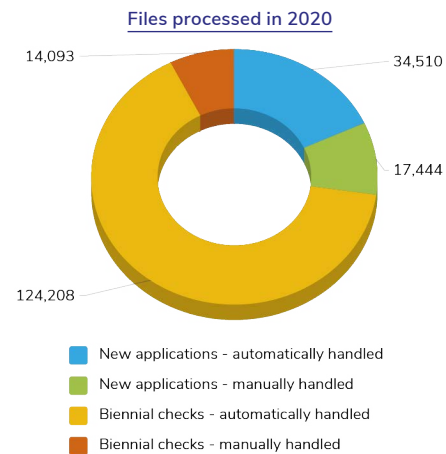
2.4.1. An accessible regulator

Simplified administrative file handling

Examinations. Following the public tender launched in November 2019, the BIPT awarded the contract for the creation of a web application to organise examinations for operator certificates, both for shipping and for radio amateurs. The contract includes the creation of an examination website, a registration counter, online payment and a link to the BIPT customer database. This project should be completed by the end of 2021.

Social tariffs. As regards the monitoring of the granting conditions for the electronic communications social tariff, the BIPT uses a beneficiary database called "STTS", which enables an automated (partial) check of the granting conditions. The BIPT does not only carry out this verification upon the request with the operator but can also verify whether the applicant in question still meets the terms and conditions two years after the allocation.

In 2020, about 52,000 new requests and more than 138,000 two-yearly verifications were processed in this manner. This was mostly done automatically.



In 2017, the verification automation project was completed. This explains why the number of active files has been constantly decreasing over the past few years. By the end of 2020, 221,856 persons benefited from the social tariff. The limits for the automatic verification have hereby been reached, considering the complexity of the current granting conditions. The security of the STTS platform has been attuned to the requirements of the General Data Protection Regulation.

Minimising the administrative burden to increase accessibility

2.4. Efficient functioning

Handling of complaints regarding the functioning of the BIPT

The BIPT attaches great importance to the quality of its work and appointed a complaint coordinator to provide an appropriate response to possible complaints and, if possible, to draw lessons at the organisational level.

In 2020, the complaint coordinator handled 23 admissible complaints, over a total of 59 messages. The number of complaints, although rising compared to the previous years (2019: 13, 2018: 15, 2017: 20, 2016: 15), remains very low, considering the large number of interactions (e-mails, letters, phone calls, visits...) between the BIPT and its "clients". Through close collaboration with the departments concerned, each message or complaint received a detailed response. Let us add that the federal Ombudsman (which may be called upon to examine a case pursuant to a cooperation agreement) intervened twice in 2020: a claim could be closed during the second semester, as a second case, following a lack of additional information from the claimant.

2.4.2. New website

The BIPT launched the new version of its website on 31 March 2020. This was the last step in a long journey, which started by a reflection on the purpose of the website. The BIPT questioned and listened to the stakeholders and questioned itself, the purpose being

to create a reference website for its target audiences. Experts in ergonomics first exposed the weaknesses of the previous website, launched in 2013. Accessibility specialists then pointed out the errors made. Different user categories were consulted to structure the section intended for consumers. The expectations of professional users were then taken into account for the section dedicated to operators.

The BIPT now has a new site, the modern and clean look of which adapts to all screen sizes (desktop, tablet, smartphone). Its homepages present recently published content and the most searched subjects. In addition to the structures which deploy in two clicks, a powerful search engine quickly finds the information you need. A large part of the content has been rewritten and simplified. The market analyses have been organised into folders regrouping the documents composing them. The site has been updated on a day-to-day basis, and will continue to evolve in order to present more interesting content and bring more satisfaction to its various visitors.

2.4.3. Competent staff

As an introduction to this section, the members of the BIPT Council would like to express their appreciation to the IT department which, from the start of the lockdown, quickly deployed all the tools needed to telework and to congratulate all the personnel which rapidly and efficiently got to grips with them.

Personnel. By the end of 2020, the BIPT had 250 staff members: 233 statutory agents and 17 contractual agents. This number represents 240.4 full-time equivalents. Among them, 15 staff members (14.8 FTE) were put at the disposal of the Office of the ombudsman for the postal sector and 17 staff members (16.6 FTE) were put at the disposal of the Office of the ombudsman for telecommunications. Their duty is to assist the ombudsmen in handling of complaints of consumers in their respective sector.

In 2020, the BIPT hired 16 new staff members at different levels and with various profiles: 3 civil engineers, 1 legal expert, 9 administrative collaborators (of which 4 for the offices of the ombudsman) and 3 technical collaborators.



2.4. Efficient functioning

Also this year, four statutory staff members were promoted from level C to level B: one promotion to the position of Administrative Head of Department and three promotions to Technical Head of Department.

Training. In 2020, the Training Department continued its mission of continuous staff training and adapted to the pandemic crisis: trainings which could not be organised in face-to-face sessions were then organised virtually.

In total, 544 training days were organised for the staff, or the equivalent of 2.5 training days per FTE.

Specific attention is drawn to:

- The conclusion of an important training file: training all the staff members who have or should have the status of investigating officer regarding the required competences in that framework. A comprehensive syllabus on the competences of investigating officers was drafted before the training. The latter was then organised virtually during the fourth quarter. In total, about 70 staff members were trained and the training received an average overall score of 8.4.
- A PowerPoint training in the context of the continuation of the internal policy of office automation training. This training was organised in face-to-face, during the first quarter, and received an average overall score of 8.6.

- The follow-up of specific online training courses provided by the ITU for certain profiles (engineers, economists).

Numerous other trainings were organised to meet the personnel's needs. These needs can be identified for one person, for a department or for the BIPT.

The objective of the Training Department is to always provide the most appropriate response to them.

BIPT working rules. In 2020, the informal consultation with the trade unions ended with a new text for the BIPT working rules. The text has yet to be formalised by a communication to the staff and presenting it to the Sector committee VIII. Then, the update of the BIPT working rules will only come into force in 2021.

Well-being. In execution of the action plan that was drafted based on the results of the psychosocial risk analysis, focus groups were created in collaboration with Cohezio in a number of departments with a higher risk profile according to the analysis. The recommendations which were made within these groups were translated into specific actions which were then effectively implemented. Furthermore, the role of the "person of confidence" and the existence of the "Register of acts of third parties" were explicitly brought to the attention of the staff.

In the context of the Covid-19 pandemic, teleworking within our organisation was extended to all positions lending themselves to it. To that end, a protocol was concluded with each staff member. The federal regulation which was adopted during that period, such as the corona parental leave and the compensatory allowance for home-workplace commute, was also implemented by the BIPT.

A modern
and efficient
work environment



3



CHAPTER 3

2020 IN NUMBERS

3.1. Electronic communications

3.1.1. 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 chapter presents the major trends in 2020.

The widespread use of teleworking slowed the growth in mobile data traffic

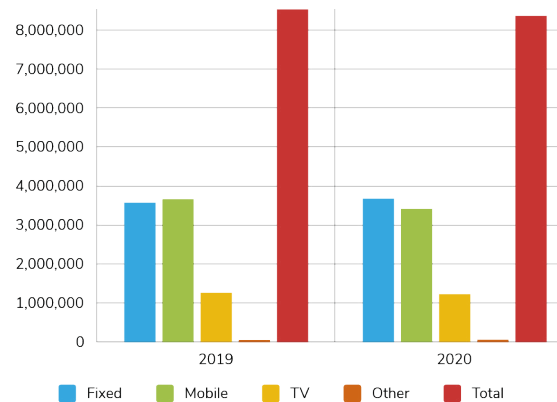
Turnover and investment

In 2020, the electronic communications and TV market yielded a turnover of € 8.36 billion, or a 2% decrease compared to 2019. The financial impact of Covid-19 on the overall turnover is thus relatively limited. While the turnover of the mobile (-6%) and television (-2.9%) segments declined, the turnover of the fixed segment increased compared to 2019: +2.9 %.

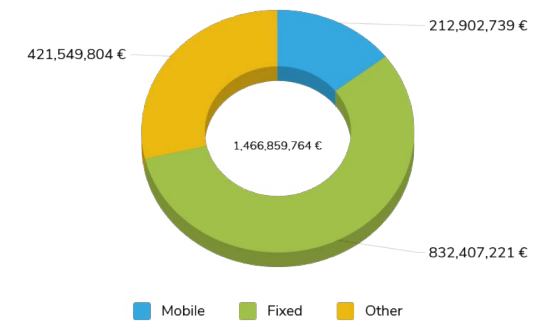
The level of investment in the fixed and mobile electronic communications (licences not included) remains, with €1.47 billion, 4.5% lower than in 2019. In proportion to the turnover, capital expenditure represents 20.9% of the turnover, vs. 21.5% in 2019.

to the postponement of the 5G auction, the choice of a provider for the radio access network at Proximus and the completion of the mobile network improvement programme at Telenet also resulted in a delay in mobile investments.

Turnover distribution



Investment distribution



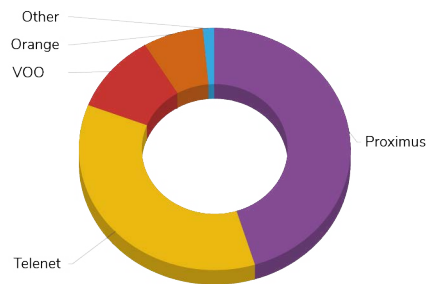
The decline in investment is mainly due to the mobile segment. Mobile investments decreased by €49.35 million (-19%) to €212.9 million in 2020. The reason is both general and specific to each operator: in addition

3.1. Electronic communications

Players

Orange’s market share in volume in the fixed market is constantly increasing. Thanks to the opening up of the cable networks, imposed by the PSM regime of 2010 and extended in 2018, Orange is closing the gap with Proximus and Telenet on the domestic fixed broadband market. Both competitors are losing market shares to Orange (+1.9 percentage point). On the residential bundle market, Telenet (-2.3 percentage points) and VOO (-0.3 percentage point) are also being pressured by Orange, which increased its market share by 1.8 percentage point. Proximus makes however small profits: +0,5 percentage point of market share. In the mobile segment, Orange lost 0.2 percentage point of market share in 2020. With a market share between [20-30]%, Orange is, however, ahead of Telenet, which lost 1.7 percentage point. Proximus’ market share rose by 0.3 percentage point, but the

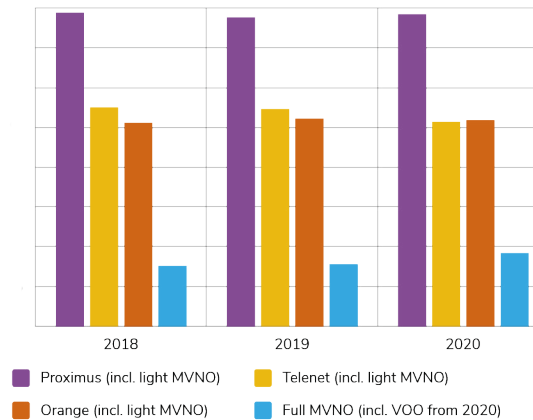
Market shares in terms of fixed broadband lines



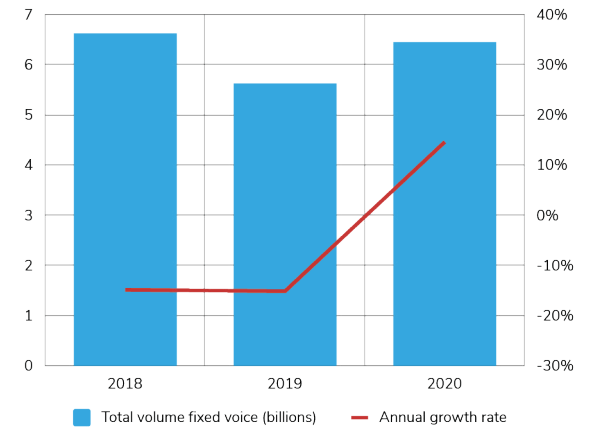
strongest growth was reported by the full MVNOs (+1.4 percentage point to 9.2%), thanks to Voo’s transition from light to full MVNO.

Fixed services (voice – broadband)

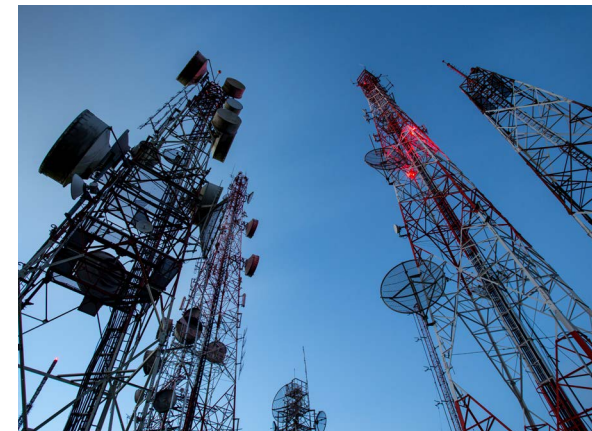
Market shares in terms of active SIM cards



Call minutes over fixed networks in 2018, 2019, 2020



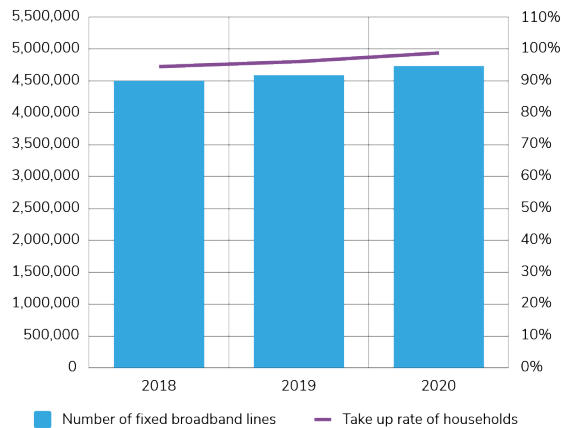
While the number of accesses to the fixed telephony network is still declining (-7,5% to 3,64 million access channels), we notice an increase in the use of fixed telephony in 2020: the total volume of fixed voice in 2020 was 14.7% higher than in 2019. This shows an evolution of the usage patterns due to the Covid-19 pandemic.



3.1. Electronic communications

The shift towards online activities leads to an increase in the number of fixed broadband lines of 3.1% to 4.73 million, representing a take-up rate of 98.9% among Belgian households.

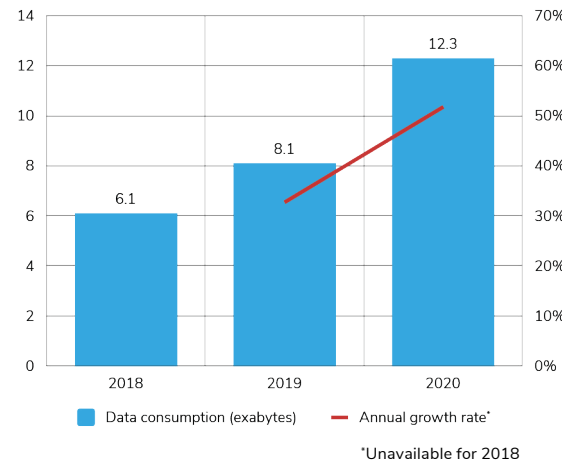
Number of fixed broadband lines and take up rate of households



The increased need for a quick and reliable Internet and the adaptation of the fixed Internet limits (so that customers can temporarily use an unlimited download volume with no extra charge) during the lockdown periods stimulated the fixed broadband traffic, which rose by 52% to 12.3 exabytes⁴⁰. The year before, we noted a growth of 33%.

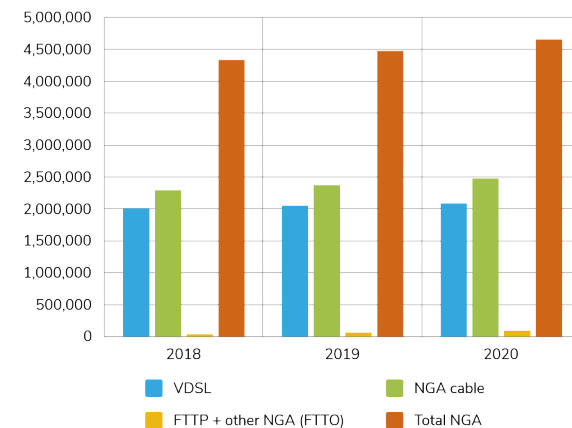
The fixed Internet profiles have been upgraded to speed up the transfer of the increased data traffic and allow multiple users to use the fixed Internet connection simultaneously. These increased upload and download speeds encouraged Belgian Internet users to choose faster broadband plans: by the end of 2020, 66% of the broadband fixed lines sold on the retail markets were based on an advertised download speed of 100 Mbps, vs. 63% in 2019.

Traffic on the fixed broadband in exabytes in 2018, 2019, 2020



The number of VDSL lines on the copper and fibre networks rose by 1.9%, whereas the number of broadband lines on the fibre and coaxial networks (cable >= 30 Mbps) grew by 4,6%. The number of fixed broadband lines entirely based on optical fibre grew by 51% in 2020, but its share in the total number of fixed broadband lines remains low (1.9%).

New generation fixed lines (NGA) per technology



Proximus made progress in the deployment of fibre (about 153,000 new connections were made available to dwellings and undertakings, for a total of 460,000). However, the pace will pick up in the years to come. Thanks to cooperation agreements with Eurofiber (for Wallonia) and EQT Infrastructure (for Flanders),

40. One exabyte equals 1 billion gigabytes (GB)

3.1. Electronic communications

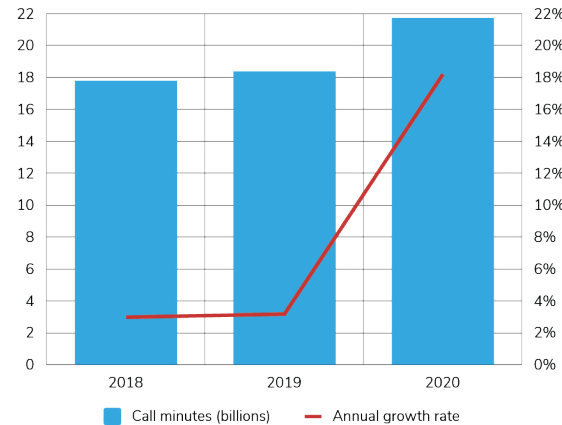
Proximus expects to reach 4.2 million fibre connections by the end of 2028, which correspond to a fibre coverage of about 70%. This will contribute to reaching the European connectivity objectives which provide that, by 2030, all European households should have effective access to a Gigabit network.

Mobile services

The number of active SIM cards (excluding M2M) by the end of 2020 amounted to 11.99 million, i.e. 0.3% more than one year before. The number of M2M SIM cards broke the symbolic 4 million units barrier with 0.99 million additional SIM cards (+32%).

During the same period, the number of mobile data SIM cards increased by 0.3 million (+3%) to 10.34 million. The total number of call minutes of Belgian mobile subscribers rose by 3.3 million (+18%) to 21.7 billion minutes in 2020. In the two previous years, the growth amounted to 3% only.

Call minutes over mobile networks in 2018, 2019, 2020

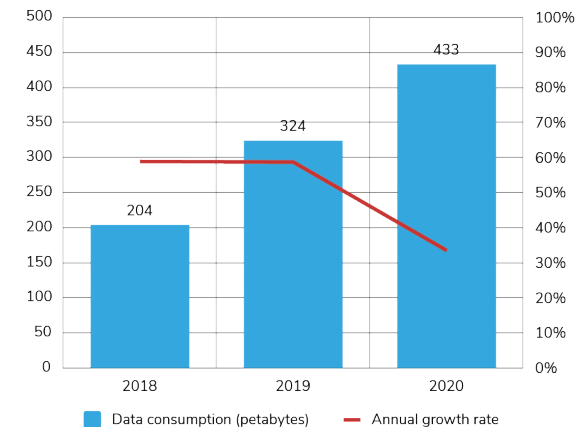


However, the travel restrictions to prevent the spread of Covid-19 led to a decrease in the number of Belgian subscribers abroad and the number of foreigners using Belgian mobile networks. Compared to 2019, this resulted in a decrease by 27% of the volume of roaming voice, to 0.9 billion minutes for Belgian subscribers, and a decrease by 9% to 1.03 billion minutes for visitors on the Belgian mobile networks.

The number of text messages sent by Belgian mobile subscribers continued its decline, by 3.3 billion messages (-19%) to 14.5 billion.

The use of data by Belgian mobile subscribers grew more slowly than in 2019, increasing by 109 PB⁴² (+34%) on an annual basis to 433 PB. The year before, we noted a growth of 120 PB (+59%). The weaker growth of national data traffic is attributable to the fact that more people worked from home and chose the Wi-Fi network.

Mobile data traffic in petabytes in 2018, 2019, 2020



The average monthly mobile call volume per active SIM card grew by 23 minutes to 151 minutes, whereas the number of text messages decreased by 23 messages to 101. Per active data SIM card, 3.7 GB mobile data were used, i.e. 0.8 GB more than in 2019.

41. Un pétaoctet (Po) équivaut à un million de gigaoctets (Go)

3.1. Electronic communications

64% of residential customers choose a bundle

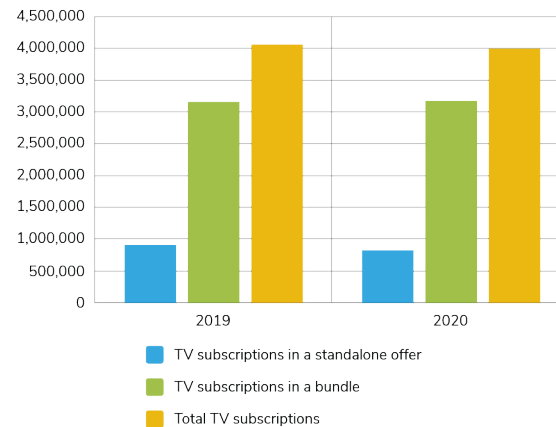
Television

In 2020, the number of TV connections of Belgian telecommunications operators (excluding satellite, including OTT TV) slightly decreased by 21,000 or 0.5% on an annual basis. Access to digital television grew to reach a 95% share of the total television access: +1 percentage point on an annual basis.

On the residential market, the number of TV customer relationships decreased by 0.06 million (-1.6%) to 4 million. Unlike the number of customers with standalone TV, which shows a downward trend (-0.08 million, -19%), the number of bundles including television is still slightly increasing (+0.02 million to 3.18 million). OTT television is the growth driver in

that area: The rise in the number of bundles including OTT television (+25,230) offsets the decrease in the number of bundles including traditional television (-6,884).

Number of TV subscriptions and distribution according to the type of offer

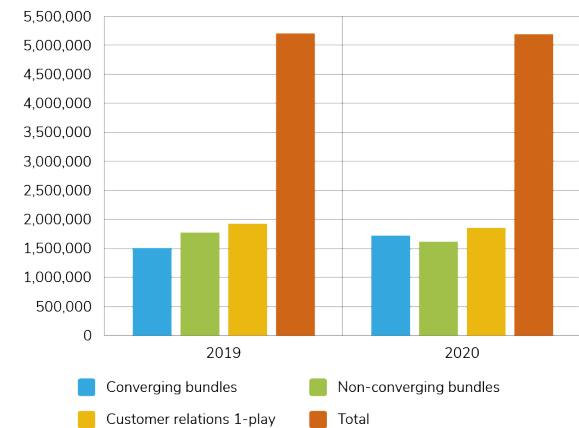


Bundles

Belgium is still a market characterised by convergence: 64% of all residential customer relationships are based on a bundle (+1 percentage point). Converging offers combining fixed and mobile services constitute a strategy of retention and conquest of residential customers: they rose by 0.2 million to 1.72 million

(+14%) and represented 52% of the residential bundle market by the end of 2020. On the converging residential submarket, the 3-play bundle (fixed broadband + mobile + TV) is the one experiencing the greatest growth (+0.14 million to 0.5 million). 4-play shows a weaker growth rate (+0,04 million to 1,12 million), but remains nevertheless the most popular bundle on the residential bundle market (33% of all bundle combinations).

Distribution of bundles



3.1. Electronic communications

3.1.2. Notifications

Access to the electronic communications market is free. A newcomer on the market can start its activities after a simple notification to the BIPT. A vade mecum was published to facilitate market entry (see point 2.1.4).

By the end of 2020, there were 388 notifications concerning the following services:

A vade mecum
to facilitate
market access

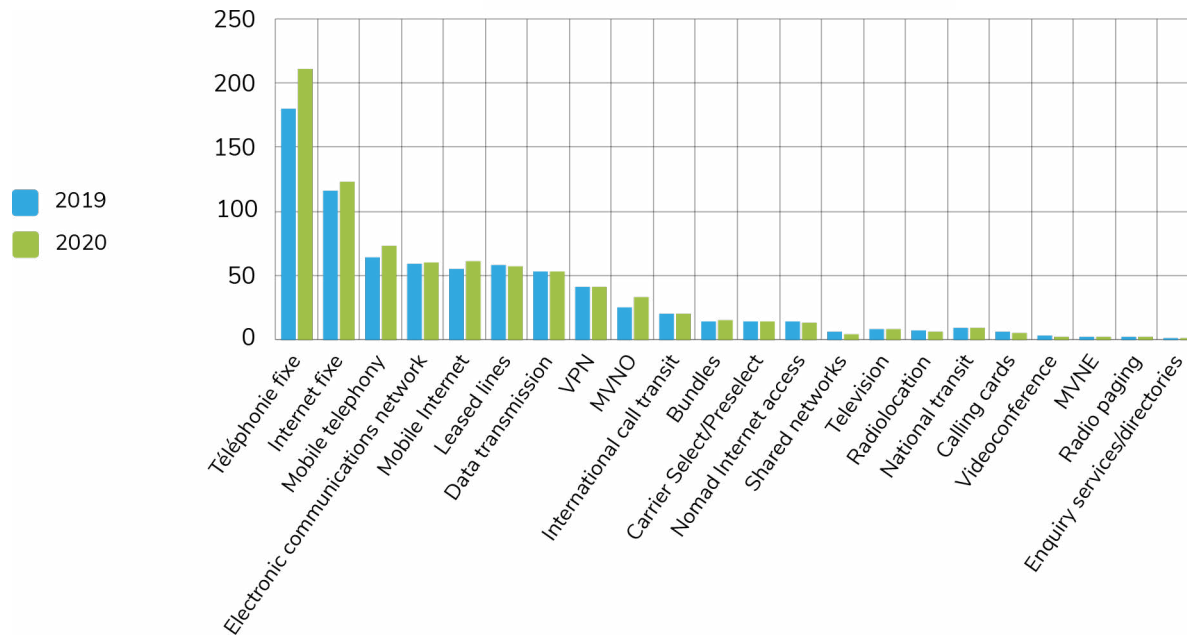
3.1.3. Networks

Fixed. Because of the density of their infrastructure, Proximus, Telenet and Brutélé/Nethys (Voo) are the operators with the largest coverage of the country in terms of fixed networks. They provide their services to the main public and undertakings. Their tariff plans for the residential market can be consulted in the tariff simulator besttariff.be (see 2.2.1.).

The operators with a more limited network coverage can use the infrastructure of the bigger operators to provide their services to their own customers, both private and business. This is “wholesale” access. Examples are Orange, which uses Telenet’s and VOO’s cable to launch its own fixed Internet/digital TV tariff plans on the residential market, and EDPnet and Destiny, which have access to Proximus’ fibre network to provide cloud communication solutions to residential and business customers. The BIPT plays a crucial role in such wholesale access. In this context, in 2020, it adopted a decision on the draft decision regarding the monthly tariffs for wholesale access to the cable operator’s networks and consulted the market on the tariffs for access to Proximus’ FTTH network (see 2.1.1.).

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.

Distribution of electronic communications networks and services



3.1. Electronic communications

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. The Belgian market only has a few full MVNOs. The largest are Lycamobile and VOO (both active on the Telenet Group network), and Mobile Vikings⁴² which uses Orange's network. There are also "light MVNOs" which have their own customer management and invoicing system. Examples in this category are Carrefour and EDPnet.



3.1.4. Licences, examinations and certificates

The BIPT is responsible for the management and monitoring of the radio spectrum in Belgium. The BIPT assigns the frequencies and issues licences for

the "radio users", either the "operators" who have obtained user rights for public radio communications, or licences for private radio communications.

As regards the use of private radio communications stations, the BIPT's activities comprise:

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 and the manner in which they operate⁴³:

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 links⁴⁴;

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 aims at a similar 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;

6th 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:

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

42. In December 2020, Proximus announced its intention to acquire Mobile Vikings; this acquisition must receive the Belgian Competition Authority's approval.

43. 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.

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

3.1. Electronic communications

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 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 2020 are detailed in Annexe E.

Examinations to obtain operator certificates to use certain stations

Under normal circumstances, the BIPT organises maritime radio and radio amateur examinations each month. Due to the pandemic measures, the BIPT was forced to cancel the examinations.

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"): mainly intended for professional use at sea.

For radio amateurs 2 types of examinations are organised:

- C examination: examination for the introduction licence. This examination is simple and, when passed, gives access to the use of a limited number of radio amateur bands with a limited transmitting power.
- HAREC examination: extensive examination giving access, when passed, to all radio amateur bands with a high transmitting power.

The exams organised in 2020 are detailed in Annexe E.

The Directorate-General for Air Transport of the FPS Mobility and Transport organises the examination for the certificate of aircraft station radio operator. The certificate is, however, issued to the successful candidates by the BIPT.

The number of operator certificates issued in 2020 is significantly lower than in the previous years. This is naturally due to the fact that fewer people took the examination because of the pandemic.

The certificates issued by the BIPT are detailed in Annexe E.

3.2. Postal services

3.2.1. Postal market indicators

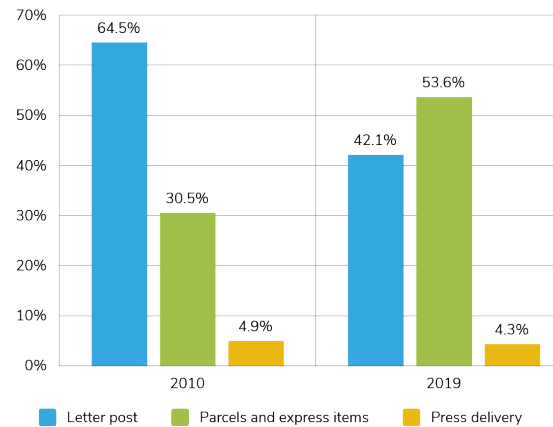
In addition to bpost and both postal licence holders, another some 700 companies are active on the Belgian postal market. To follow the developments in the market, each year the BIPT conducts a survey among the major postal operators. In 2020, the data of 23 companies were processed for the year 2019. 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 in the BIPT web pages on the postal observatory. In the second semester of 2021, the data shall be completed with the 2020 figures. You will find below the main findings regarding the 2019 figures.

Services

The 2019 figures indicate an accelerated growth of the postal market. The growth rate has been steadily increasing since 2015, up to 4,7% in 2019, vs. 3.5% in 2018. The total revenue from the postal sector amounted to €2.69 billion in 2019. This acceleration is linked to the following trends:

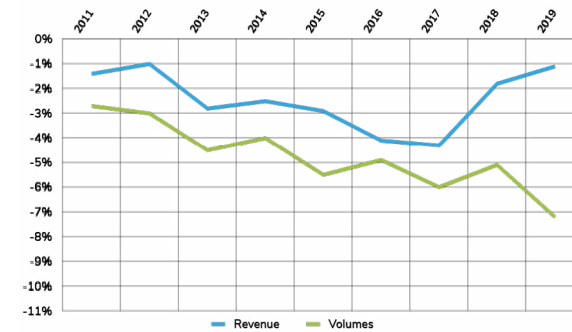
1. The dynamic growth of the parcel and express segment, which makes up a growing share of the postal market.

Composition of the postal market



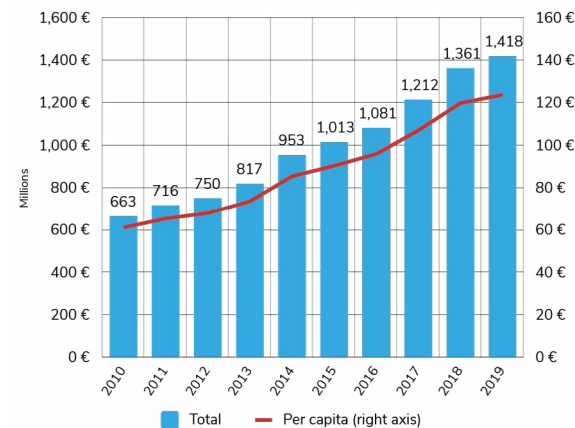
In one year's time the parcel turnover increased by more than 10.6%.

Volumes and revenue of letter post



2. Despite the strong volume drop (-7.2%), letter post revenue only slightly decreased (-1.1%) due to the sharp price increase.

Turnover of the parcel and express segment



700 postal companies

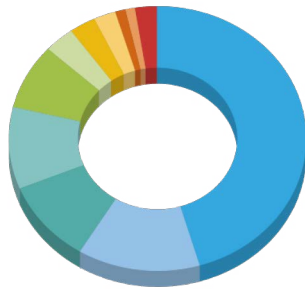
Parcel lockers
in 375 locations

3.2. Postal services

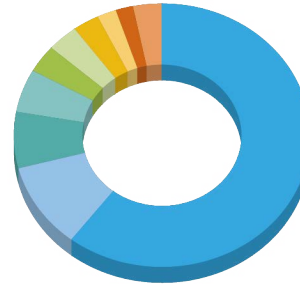
Market players

As shown by both charts above, bpost maintains its dominant position on the letter post market and is the leader in the parcel and express market.

Market share based on the parcel and express volume in 2019



Market share based on the overall turnover in 2019



Increase in the parcel turnover of more than 10%

Decrease in letter post volume of 7.2%



3.2. Postal services

3.2.2. Universal service providers - licences

Any person wishing to provide a service of letter post, 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 the granting of SPAN Diffusion's licence in September 2019, there are now three providers of the universal postal service: SPAN Diffusion in the 19 municipalities of the Brussels-Capital Region, bpost which is designated to provide the whole of the universal service across the entire territory and Glejor BVBA which wants to deliver letter post services (with the exception of registered items) in the 3650 postal code area.

3.2.3. Postal points

Since 2017, the BIPT has been gathering data of all available postal operators' postal points on the Belgian territory on the website postalpoint.be, subdivided as follows:

- letterbox for sending letter post;
- staffed point for sending and/or receiving letters and parcels;
- staffed point for sending and/or receiving parcels and/or express items;

- Parcel lockers for sending and/or receiving.

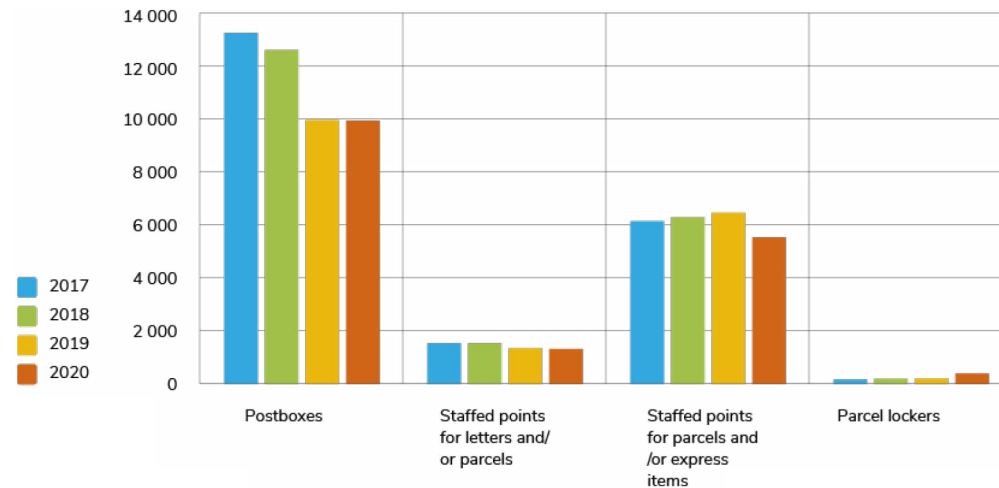
Postalpoint.be is fed by data coming from the operators and reflects the developments in the postal points network.

Until TBC-Post was declared bankrupt at the end of 2019, letterboxes for dispatching were made available for the users by both the universal service provider bpost (red letterboxes) and licence holder TBC-Post

(blue boxes). These past few years, the number of letterboxes has gradually decreased. Compared to the previous year, more than 2,000 red letterboxes disappeared from the streets.

We also notice a drop in the number of staffed points for letters and/or parcels after 2018 because of the disappearing of TBC-Post and its approx. 190 points. bpost's number of staffed points with, on the one hand, postal points and, on the other, postal offices,

Evolution of postal points



3.2. Postal services



remained fairly stable between 2017 and 2019, but is slightly decreasing in 2020.

Concerning the staffed points of other operators, in terms of parcels and/or express items, we notice an increase until 2019. In 2020, we see the impact of the disappearance of Kariboo which has been absorbed by bpost. It should also be noted that the same locations may appear multiple times. It so happens that certain staffed points, such as bookshops or petrol stations, work for more than one operator.

A new trend of recent years are parcel lockers. Those machines, equipped with a number of secured lockers, are usually installed at busy locations and can mostly be used 24/7 for sending and/or receiving parcels. In Belgium, bpost started to roll out a network of parcel machines in 2014, both for sending and collecting parcels. Moreover, this 'Cubee' network became an open network that can be used by other operators as well, such as GLS and DHL Parcel. At the end of 2020, we had already noticed a significant increase in the parcel locker network, up to 375 locations in Belgium. Outside of the scope of the postal networks and postalpoint.be, there are also operator-independent initiatives such as BringMe, Facility Lockers and ParcelHome, which offer the possibility of having a parcel delivered in a parcel locker, at home or at work.

3.3. Media

On the territory of the bilingual Brussels-Capital Region, the BIPT is responsible for the regulation of the network operators and of the radio and television broadcasting companies, barring the operators and broadcasting bodies that exclusively broadcast/make Dutch-speaking or French-speaking programmes.

Providers of audiovisual media services in the bilingual Brussels-Capital Region have to register with the BIPT for each audiovisual media service they intend to provide.

In 2020, no new audiovisual media service provider was registered. There are still thus five audiovisual media service providers acknowledged by the BIPT in the bilingual Brussels-Capital Region⁴⁵.



45. Maghreb TV, Arabia TV, Canal Maroc 1, Smithsonian Networks (SNI/SI Networks L.L.C.) and Eleven Sports Network.

4



CHAPTER 4
ANNEXES

A. Financial report and annual accounts of the funds

Article 34, subparagraph 3, of the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors (hereinafter “the Status Act”), stipulates that the annual report should comprise, among other things, a financial report and the annual accounts of the funds for the universal service regarding postal and telecommunications services respectively.

Below you will find 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. 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 2020, no universal service funds were activated.

Accounting of the BIPT - 2020

REVENUES	euros	EXPENDITURE	euros
Repayments	7,913	Staff	24,894,342
Licence and monitoring fees for private radio communications	18,586,588	Operation	9,475,413
Public licence fees	45,256,283	Investment expenditure	2,016,133
Post	2,907,206	Umbrella organisations	1,378,530
Miscellaneous	121,184	Treasury	21,138,113
Services performed for third parties	13,578	CF/RT	1,635,526
TOTAL	66,892,752	TOTAL	60,538,057

Accounting of the Office of the Ombudsman for the Postal Sector - 2020

REVENUES	euros	EXPENDITURE	euros
Repayments	--	Staff	1,776,960
Services performed for third parties (sector participation)	1,941,012	Operation	149,774
		Investment expenditure	40,404
		Umbrella organisations	300
TOTAL	1,941,012	TOTAL	1,967,438

Accounting of the Office of the Ombudsman for Telecommunications - 2020

REVENUES	euros	EXPENDITURE	euros
Repayments	24,310	Staff	1,699,858
Services performed for third parties (sector participation)	2,966,854	Operation	263,471
		Investment expenditure	28,530
		Umbrella organisations	300
TOTAL	2,991,164	TOTAL	1,992,159

B. Report on the monitoring referred to in Article 21 of the Status Act

Article 34, subparagraph 3, of the Status Act requires that the annual report contains a report of the monitoring referred to in Article 21 as well.

Article 21 of the Status Act lays down the provisions for the infringement proceedings that can be initiated when the Council has a series of indications that could point to a violation of the legislation or regulation, the compliance of which the BIPT monitors, or of the BIPT decisions adopted in implementation of that legislation or regulation.

In 2020, the BIPT imposed a fine on Telenet and a fine on Proximus (see point 2.2.5. below) for non-compliance with the rules on the prior identification of end-users of prepaid cards, via the two following decisions:

- (i) Decision of 14 January 2020 regarding the non-compliance by Telenet with the rules on the identification of end-users of prepaid cards
- (ii) Decision of 14 January 2020 regarding the non-compliance by Proximus with the rules on the identification of end-users of prepaid cards

According to the legislation which came into force on 17 December 2016 in the fight against terrorism, i.e. Article 127 of the Act of 13 June 2015 on electronic communications and the Royal Decree of 27 November 2016 on the identification of the end-user of mobile public electronic communications services provided

by means of a prepaid card (hereafter “the Royal Decree of 27 November 2016”)⁴⁶, prepaid card end-users must be correctly identified before these cards are activated.

Several inspections carried out by the BIPT revealed that certain points of sale of Proximus and Telenet did not always properly identify end-users.

When foreign customers wish to purchase a prepaid SIM card, they can, for instance, submit their international passport for identification purposes. To be able to check later if the data which the vendor entered in the programme indeed correspond to the ones on the passport, the legislation lays down that the point of sale must make a copy of the passport (Article 127, §1, subparagraph 7 of the Act of 13 June 2015 on electronic communications). However, during these inspections, it appeared that neither Proximus nor Telenet complied with that requirement.

In addition to the lack of a copy of an international passport, inspections carried out at Proximus revealed another breach, i.e. a breach of Articles 11, §§ 1 and 20, of the Royal Decree of 27 November 2016 as the operator did not use checkdoc.be⁴⁷ to register eID cards. As a matter of fact, the legislation also lays down that points of sales must verify if the eID card that is submitted for identification was not declared stolen or lost. To that end, they must use a website. The inspections revealed that Proximus did not comply

with this requirement as points of sales did not carry out this verification in practice.

In response to the findings of the BIPT, Proximus and Telenet launched a regularisation campaign to identify again the customers who had been incorrectly identified. The customers who were not identified again were deactivated. These operators also took measures to avoid committing new breaches.

Based on its findings, the BIPT decided on 14 January 2020 to impose a €150,000 fine on Proximus and a €88,782 fine on Telenet. The BIPT accepted attenuating circumstances in favour of these two operators, given the actions they took after being informed of the breaches found by the BIPT.

46. Article 127, §3, of the Act of 13 June 2005 on electronic communications provides that: “Until the measures referred to in §1 come into force, the prohibition referred to in §2 does not apply to mobile public electronic communications services provided by means of a prepaid card” (free translation). The Royal Decree of 27 November 2016 implements Article 127, §1, of 13 June 2005 on electronic communications, particular regarding the identification of users of prepaid cards for mobile electronic communications services. This decree came into force on 17 December 2016.

47. checkdoc.be is the website to verify Belgian identity documents (passport, identity card, residence permit with a chip), which allows to detect if an eID card has been stolen or lost.

C. Situation of the 2020 Operational Plan

Strategic axis “Competition” Promoting sustainable competition and investments

C/1/2020/01 Situation of the electronic communications and television market	Card carried out
C/1/2020/02 Publication of a 2019 postal observatory	Card carried out
C/1/2020/03 Drafting of a decision regarding the cable operators' reference offers	Card carried out
C/1/2020/04 Drafting of a decision regarding Proximus' reference offers for VULA, multicast, and bitstream through fibre	Card carried out
C/1/2020/05 Drafting of a decision regarding Proximus' reference offers for local unbundling and bitstream through copper network	Card carried out
C/1/2020/06 Drafting of a decision regarding one-time fees for cable, copper and fibre	Card carried out
C/1/2020/07 Drafting of a decision regarding the rental fees for cable	Card carried out
C/1/2020/08 Drafting of a decision regarding the rental fees for FTTH	Card carried out
C/1/2020/09 Drafting of a decision regarding the reference offer Proximus VoIP interconnection	Card carried out
C/1/2020/10 Monitoring of the implementation of the broadband and broadcasting market analysis	Card carried out
C/1/2020/11 Monitoring of the implementation of the market analysis on the market for wholesale high-quality access	Card carried out
C/1/2020/12 Drafting of a decision regarding the review of the SLAs and the calculation of the compensation in the reference offers for copper and fibre	Card in progress – project spread over several years
C/1/2020/13 Drafting of a vade mecum for new operators	Card carried out
C/1/2020/14 Modernisation of the secondary postal regulation	Card carried out

Strategic axis “Competition” Spurring innovation

C/2/2020/01 Report on the monitoring of the Net Neutrality Regulation in Belgium	Card carried out
C/2/2020/02 Dialogue with the e-commerce stakeholders	Card not carried out due to the health crisis

C. Situation of the 2020 Operational Plan

Strategic axis “Users” Contributing to providing transparent information to consumers and promoting social inclusion

G/1/2020/01 National price comparison of electronic communications services	Card carried out
G/1/2020/02 Tariff simulator	Card carried out
G/1/2020/03 Quality barometer of the electronic communications services	Card carried out
G/1/2020/04 Survey on perception of consumers on the functioning of the market	Card carried out
G/1/2020/05 Postal market consumer study	Card carried out
G/1/2020/06 Transparency of the postal market	Card carried out
G/1/2020/07 Implementation of Regulation 2018/644 on cross-border parcel delivery services	Card carried out
G/1/2020/08 Monitoring of the universal service	Card carried out
G/1/2020/09 Geographical element of the universal service – adequate Internet access	Card in progress - awaiting a political decision
G/1/2020/10 Review of the BIPT Council Decision of 15 July 2015 regarding the quality of service indicators	Card in progress - awaiting a political decision
G/1/2020/11 Reform of the social tariffs	Card in progress - awaiting a political decision
G/1/2020/12 Review of the quality standards regarding the universal service	Card in progress - awaiting a political decision
G/1/2020/13 Monitoring of the compliance with the Ministerial Order establishing the register referred to in Article 116/1, §1, ECA	Card in progress – project spread over several years
G/1/2020/14 Monitoring of the observance of the postal regulatory framework	Card carried out
G/1/2020/15 Monitoring of the net cost of the universal service obligations submitted by bpost	Card in progress – no compensation request for 2019 and finalisation of the ongoing study on the intangible benefits
G/1/2020/16 Monitoring the price of products included in the universal postal service	Card carried out

Strategic axis “Users” Ensuring a reliable environment

G/2/2020/01 Transparency regarding the quality of fixed and mobile networks	Card in progress - certain subprojects have been modified in the data portal
G/2/2020/02 Monitoring and information of online vendors	Card carried out
G/2/2020/03 Monitoring and information of manufacturers and importers	Card carried out
G/2/2020/04 Notification of security incidents	Card carried out
G/2/2020/05 Inspection of critical infrastructures	Card in progress – project spread over several years

Strategic axis “Scarce resources” Managing scarce resources

S/1/2020/01 Adaptation of the numbering plan to the long-term changes in the market	Card carried out
S/1/2020/02 Multiband auction - Auction of the 2G, 3G, 700 MHz and 3400-3800 MHz frequency bands	Card not carried out – awaiting a political decision
S/1/2020/03 Extension of the 2G and 3G mobile licences	Card in progress – awaiting a political decision
S/1/2020/04 Network saturation map	Card in progress – project spread over several years
S/1/2020/05 Innovation tables in support of 5G verticals	Replaced by the project “knowledge and learning platform” in progress - project spread over several years
S/1/2020/06 Use of drones for detection and measurements	Card not carried out – awaiting certification of the drones by the DGAT

C. Situation of the 2020 Operational Plan

Strategic axis “Efficient functioning” Ensuring an accessible functioning

E/1/2020/01 Media campaign Besttariff.be	Card carried out
E/1/2020/02 BIPT website	Card in progress – project spread over several years
E/1/2020/03 Participation in national and international consultation bodies	Card carried out

Strategic axis “Efficient functioning” Being an attractive employer

E/2/2020/01 Internal operational plan	Card carried out
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D. List of the documents published in 2020

Decisions	
17/01/2020	Decision regarding the composition of the board mentioned in the Royal Decree of 5 May 2006 laying down a reconciliation procedure before the BIPT for 2020
17/01/2020	Decision of 23 December 2019 regarding the composition of the board referred to in the Royal Decree of 5 May 2006 laying down a conciliation procedure before the Belgian Institute for Postal Services and Telecommunications for the year 2020
21/01/2020	Decision of 14 January 2020 regarding the non-compliance by Telenet with the rules on the identification of end-users of prepaid cards
21/01/2020	Decision of 14 January 2020 regarding the non-compliance by Proximus with the rules on the identification of end-users of prepaid cards
25/02/2020	Decision of 28 July on the radio interfaces for short-range devices
31/03/2020	Decision of 25 March 2020 regarding the withdrawal of the decision of 17 September 2019 regarding the request to extend the user rights of Citymesh with the municipality of Kortrijk in the 3.5 GHz frequency band
16/04/2020	Decision of 25 March 2020 regarding the reference offer of Proximus for unbundled and bitstream access to the local copper loop
05/05/2020	Decision of 28 April 2020 on the Bitstream GPON reference offer of Proximus
27/05/2020	Decision of the CRC of 26 May 2020 on the monthly prices for wholesale access to the cable operators' networks for television broadcasting on the territory of the bilingual Brussels-Capital Region and broadband
25/06/2020	Decision of 23 June 2020 on the extension of the user rights of Citymesh with the municipalities of Kortrijk and Zaventem in the 3.5 GHz frequency band
14/07/2020	Decision of 30 June 2020 on the revision of the "one-time fees" and the monthly rent "ISLA Repair" of the reference offers BRUO and Bitstream xDSL of Proximus
15/07/2020	Decision of 14 July 2020 on the granting of temporary user rights in the 3600-3800 MHz frequency band to Entropia
15/07/2020	Decision of 14 July 2020 on the granting of temporary user rights in the 3600-3800 MHz frequency band to Cegeka
15/07/2020	Decision of 14 July 2020 on the granting of temporary user rights in the 3600-3800 MHz frequency band to Telenet
15/07/2020	Decision of 14 July 2020 on the granting of temporary user rights in the 3600-3800 MHz frequency band to Orange
15/07/2020	Decision of 14 July 2020 on the granting of temporary user rights in the 3600-3800 MHz frequency band to Proximus
29/07/2020	Decision on the radio interfaces for short-range devices and PMR-446 devices

Decisions	
29/07/2020	Decision of 28 July 2020 on the coexistence of public mobile networks with the GSM-R network in the 900 MHz band
04/09/2020	Decision of 1 September 2020 on the reference offer of Proximus regarding IP interconnection (PRIO)
11/09/2020	Decision on the monitoring of mail delivery times for the year 2019
17/09/2020	Registration of Eleven Sports Pro League 1-2-3
23/09/2020	Decision of 1 September 2020 on the reference offer of Proximus regarding IP interconnection (PRIO) – Coordinated version taking account of the corrigendum of 22 September 2020
23/09/2020	Corrigendum of 22 September 2020 – Decision of 1 September 2020 on the reference offer of Proximus regarding IP interconnection (PRIO)
01/10/2020	Decision of 22 September 2020 on the granting to Citymesh of rights of use in the frequency band 2520-2535/2640-2655 MHz for the provision of electronic communications services on the Belgian territory
02/10/2020	Decision regarding the analysis of tariff increases for bpost's single-piece rates for the year 2021
13/10/2020	Decision of 29 September 2020 on the technical and operational conditions for the avoidance of harmful interference in the 3400-3600 MHz band
15/10/2020	Decision of 13 October 2020 regarding the reorganisation of the temporary user rights for the 3600-3800 MHz band
15/10/2020	Decision of 13 October 2020 on the extension of the rights of use of Gridmax
29/10/2020	Decision of 27 October 2020 on the granting to Citymesh of temporary user rights for the band 3410-3510 MHz for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea

D. List of the documents published in 2020

Consultations

13/01/2020	Consultation on the radio interfaces for short-range devices
15/01/2020	Consultation on the draft of the operational plan 2020
22/01/2020	Prior consultation: Proximus reference offer PRODA – Duct Access in GPON Underground Deployments
03/02/2020	Prior consultation: Proximus reference offer PRIO – VoIP Interconnection offer
24/03/2020	Consultation on the draft decisions regarding the granting of temporary user rights for the 3600-3800 MHz band
26/03/2020	Consultation on the radio interfaces for short-range devices and PMR-446 devices
01/04/2020	Consultation of 31 March 2020 regarding the extension of the user rights of Citymesh with the cities of Courtrai and Zaventem in the 3.5 GHz frequency band for the provision of electronic communications services on the Belgian territory
02/04/2020	Draft decision of 1 April 2020 on granting exclusive frequency bands for the use of radio relay links
14/04/2020	Consultation about the draft decision on the approval of the reference offers of Brutélé for the access to the television offer in the bilingual Brussels-Capital Region and for the access to the broadband offer
14/04/2020	Consultation about the draft decision on the approval of the reference offers of VOO SA for the access to the broadband offer
14/04/2020	Consultation about the draft decision on the approval of the reference offers of Telenet for the access to the television offer in the bilingual Brussels-Capital Region and for the access to the broadband offer
08/06/2020	Prior consultation: Telenet Group Mobile IP Reference Interconnect Offer
12/06/2020	Consultation of 10 June 2020 regarding the draft decision on the extension of the user rights of Gridmax
16/06/2020	Consultation of 9 June 2020 regarding the CLI guidelines (Calling Line Identification)
16/06/2020	Consultation of 15 June 2020 regarding the draft decision on the coexistence of public mobile networks with the GSM-R network in the 900 MHz band
07/07/2020	Consultation regarding the rules on the stations and call signs of radio amateurs
07/07/2020	Consultation regarding the tests and examinations for radio amateurs
22/07/2020	Consultation on the communication project on the risk analyses regarding the security of networks and information systems

Consultations

18/08/2020	Draft Decision on the granting to Citymesh of temporary user rights in the 3410-3510 MHz band for the establishment and operation of a transmission installation in the Belgian exclusive economic zone in the North Sea
30/09/2020	Draft decision on the wholesale FTTH tariffs of Proximus (Bitstream Fiber GPON reference offer)
08/10/2020	"One-time fees" and monthly rental price "SLA Repair" of the reference offers of the cable operators for access to the television offer in the bilingual area of Brussels Capital and for access to the broadband offer
02/12/2020	Consultation on the bill and draft Royal Decree introducing additional security measures for the provision of mobile 5G services
18/12/2020	Consultation on the draft decision on the extension of the 2G and 3G licences
22/12/2020	Consultation on the draft of the operational plan 2021

D. List of the documents published in 2020

Communications

22/01/2020	Communication regarding the monitoring of the universal telecommunications service 2019
29/01/2020	Communication on the list of postal services providers holding an individual licence
31/01/2020	Communication of 28 January 2020 regarding the granting of temporary user rights for the establishment and operation of a transmission installation in the 3600-3800 MHz band
13/03/2020	Communication on the Covid-19 virus
19/03/2020	Communication on the Covid-19 virus following the communication of the Belgian government of 17 March 2020
02/04/2020	Communication on the guidelines regarding the calculation of the amount of the administrative fines imposed by BIPT
07/04/2020	Communication on the possibility of making telecommunications points of sale available to customers under certain conditions
18/04/2020	Communication on the report of Caggemini Invent concerning the evolution of mobile data associated with licensed spectrum in Belgium and the impact of the presence of media
21/04/2020	Communication of 21 April 2020 regarding the extension of the answer period to the consultation of 23 March 2020 regarding the assignment of temporary rights of use in the 3600-3800 MHz band
05/05/2020	Covid-19: Suspension measures for private radio licences
12/05/2020	Communication on call numbers used for the tracing of Covid-19 contacts in Belgium
20/05/2020	Communication on the availability of electronic communications networks for remote evaluations by Belgian educational establishments
30/06/2020	Report on the monitoring of net neutrality in Belgium 2019-2020
15/07/2020	Communication regarding the granting of temporary user rights in the 3600-3800 MHz frequency band following the public consultation
04/09/2020	Communication of 1 September 2020 on IP interconnection with mobile operators
24/09/2020	Communication regarding the assessment of the bpost tariffs considered within the framework of the European regulation on cross-border parcel delivery services
23/10/2020	Communication of 16 October 2020 regarding the Belgian postal services observatory for 2019

Communications

28/10/2020	Communication on the platform SERIMA.be (risk analyses regarding the security of networks and information systems)
18/11/2020	Communication on the conformity of Proximus's cost accounting system for 2013-2018
18/11/2020	Communication on the conformity of Proximus's accounting separation for 2013-2018
24/11/2020	National benchmarking of the telecommunications services rates in Belgium [Tariffs applied on 11 September 2020]
11/12/2020	Guidelines Calling Line Identification (CLI) of 4 December 2020

D. List of the documents published in 2020

Opinions

23/03/2020	Opinion of 11 March 2020 regarding the draft Resolution of the Chamber of Representatives of 16 January 2020 on the social role of the postman
06/04/2020	Opinion of 6 April 2020 on the bill of 3 December 2019 amending the Act of 26 January 2018 on postal services as regards delivery times
07/08/2020	Opinion of 4 August 2020 on the legislative proposal No 1033 and the corresponding amendments, amending the Act of 13 June 2005 as regards the portability of e-mail addresses
09/09/2020	Opinion on the bill No. 900 amending the Act of 13 June 2005 on electronic communications, with a view to tackling bill shock situations following the use of certain telecommunications services and the amendment thereto
17/09/2020	Opinion on the application for the benefit of the mandatory distribution right for the audiovisual media service "BX1"
21/09/2020	Opinion on the bill No. 0642/001 of 17 October 2019 on the reform of social tariffs for electronic communications
22/12/2020	Opinion of 25 March 2020 on a draft Royal Decree amending the Royal Decree of 7 March 1995 on the establishment and operation of GSM mobile telephone networks
24/12/2020	Opinion on the draft Royal Decree regarding sailors

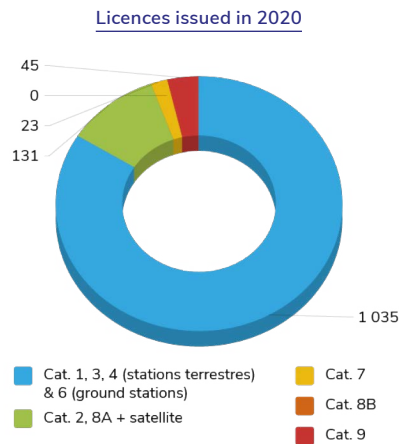
Press releases

21/01/2020	The BIPT imposes a fine on Telenet and Proximus for non-compliance with the rules on the identification of prepaid users
31/01/2020	The BIPT suggests a temporary solution allowing the introduction of 5G and ensuring the continuity of 2G and 3G rights
20/02/2020	BIPT makes additional spectrum available for 4G
19/03/2020	BIPT extends the deadline for applications for the assignment of additional 4G spectrum
24/03/2020	Five operators are taken into account by BIPT for the granting of temporary rights of use for the introduction of 5G
18/04/2020	The share of media in mobile data
20/04/2020	BIPT outlines the consequences of the destruction of GSM masts
11/05/2020	European Commission greenlights new wholesale tariffs for access to cable operators' networks
19/05/2020	Citymesh: sole candidate for the remaining 4G radio frequencies in the 2.6 GHz frequency band
27/05/2020	New tariffs for access to the cable networks
01/07/2020	The economic statistical report of BIPT shows once again a sharp increase in mobile data consumption
08/07/2020	The economic statistical report of BIPT shows a strong increase in the use of fixed Internet and a shift towards quadruple-play offers
15/07/2020	BIPT grants temporary 5G user rights to five operators
22/09/2020	The BIPT has published the results of its annual survey of the consumers' perception of the electronic communications market
30/09/2020	The BIPT consults the market regarding the tariffs for access to the fibre network of Proximus
01/10/2020	The BIPT assigns the remaining 4G radio frequencies

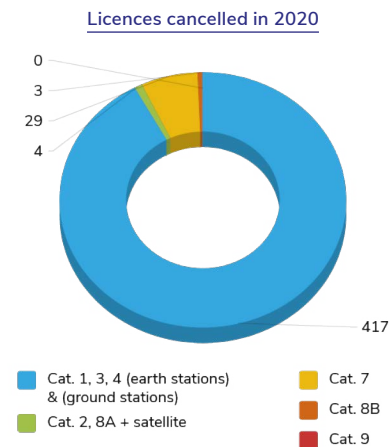
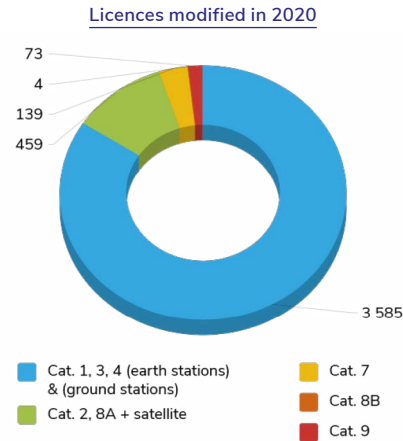
E. Licences, examinations and certificates issued in 2020

Licence granting

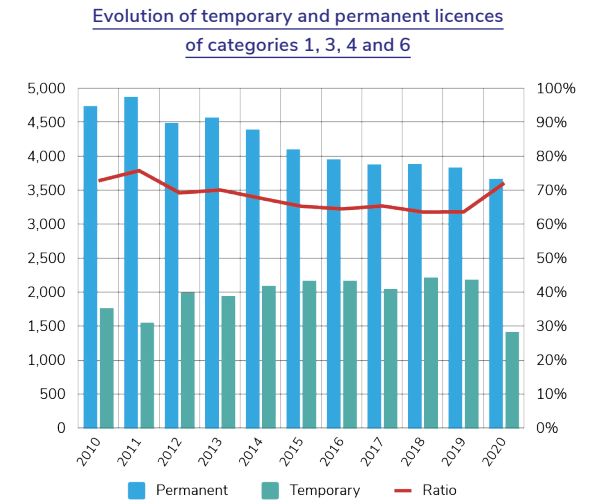
In 2020, 1,234 new licences were issued, 4,260 were modified and 453 were cancelled, for a total of 5,947 files handled that year.



The chart “Licences issued in 2020” gives an overview of the changes made in previously granted licences. There are numerous modifications, e.g. adding/removing radio stations or frequencies, changes in addresses, changes in the contact person’s details, etc.



Licences of the 1st, 3rd, 4th and 6th category can also be represented over time. The chart below gives an overview of the evolution of the temporary and permanent licences throughout the years.

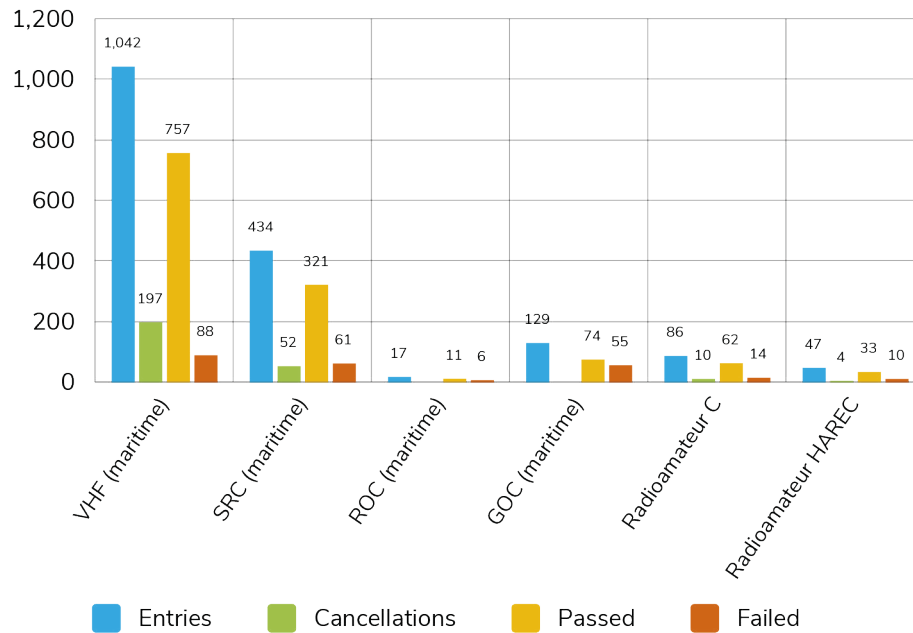


E. Licences, examinations and certificates issued in 2020

Examinations to obtain operator certificates to use certain stations

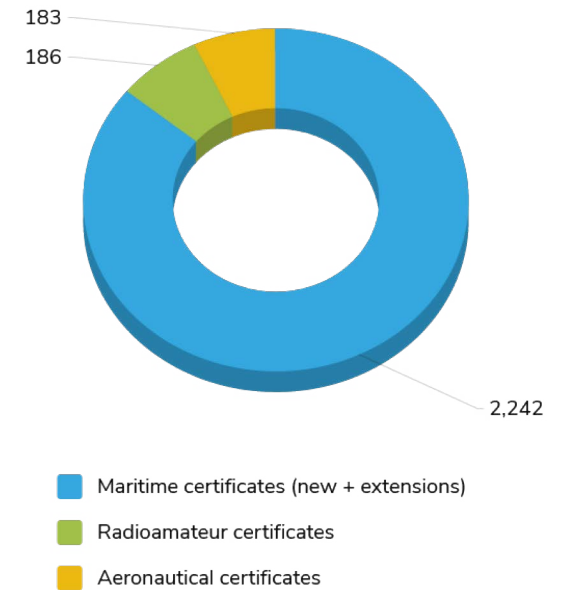
The various examinations organised by the BIPT in 2020 are detailed in the following chart:

BIPT examinations in 2020



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

Certificates issued in 2020



F. Useful addresses

Belgian Competition Authority

City Atrium
Rue du Progrès 50
1210 Brussels
Tel 02 277 52 72
Fax 02 277 53 23
info@bma-abc.be
www.bma-abc.be

FPS Economy, SMEs, Self-Employed and Energy

City Atrium C
Rue du Progrès 50
1210 Brussels
Tel 0800 120 33
Fax 0800 120 57
info.eco@economie.fgov.be
www.economie.fgov.be

Office of the Ombudsman for the postal sector

Boulevard du Roi Albert II, 8 boîte 4
1000 Brussels
Tel 02 221 02 30
info@smspo.be
www.smspo.be

Office of the Ombudsman for Telecommunications

Boulevard du Roi Albert II, 8 boîte 3
1000 Brussels
Tel 02 223 06 06
Fax: 02 219 77 88
plaintes@mediateurtelecom.be
www.mediateurtelecom.be

Consultative Committee on Postal Services

Ellipse Building C
Boulevard du Roi Albert II, 35 boîte 1
1030 Brussels
Tel. 02 226 87 31
Fax: 02 223 88 77
comconspost@bipt.be
www.ccsp-rcp.be

Consultative Committee on Telecommunications

Ellipse Building C
Boulevard du Roi Albert II, 35, boîte 1
1030 Brussels
Tel. 02 226 87 58
Fax: 02 223 88 77
sg@ibpt.be
www.cct-rct.be

Medienrat der Deutschsprachigen Gemeinschaft Belgiens im Ministerium der Deutschsprachigen Gemeinschaft Belgiens

Gospertstraße 42
4700 Eupen - Belgien
Tel 087 59 63 00
Fax: 087 55 28 91
info@medienrat.be
www.medienrat.be

Conseil supérieur de l'audiovisuel

Rue Royale 89
1000 Brussels
Tel. 02 349 58 80
info@csa.be
www.csa.be

Vlaamse Regulator voor de Media

Boulevard du Roi Albert II, 20 – boîte 21
1000 Brussels
Tel. 02 553 45 04
vrm@vlaanderen.be
www.vlaamseregulatormedia.be



Belgian Institute for Postal Services
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