



Activity report of the ComCom 2025



Schweizerische Eidgenossenschaft
Confédération suisse
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Confederaziun svizra

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CONTENT

EDITORIAL	3
I. AN OVERVIEW OF THE TELECOMS MARKET	4
1. DEVELOPMENT OF MOBILE NETWORKS	4
2. DEVELOPMENT OF FIXED NETWORKS	10
2.1. ACCESS NETWORKS	10
2.2. FIXED NETWORK TELEPHONY	10
2.3. BROADBAND OVER THE FIXED NETWORK	10
II. COMMISSION AND SECRETARIAT	16
1. COMMISSION	16
2. SECRETARIAT	17
III. ACTIVITIES OF THE COMMISSION	19
1. ACCESS CASES	19
1.1. INTERCONNECTION AND OTHER FORMS OF ACCESS PURSUANT TO ART. 11 TCA	19
1.2. INTERCONNECT PEERING	20
1.3. ACCESS TO THE BUILDING ENTRY POINT AND INSTALLATIONS WITHIN BUILDINGS	20
2. LICENCES	21
2.1. UNIVERSAL SERVICE	21
2.2. MOBILE RADIO COMMUNICATIONS LICENSES	22
3. RESPONSES TO CONSULTATIONS	23
4. INTERNATIONAL RELATIONS	24
5. OUTLOOK FOR 2026	24
IV. FINANCES	25
ABBREVIATIONS	26
SOURCES	28

Telecommunications has undergone a fundamental transformation over the past 25 years. While it was once used primarily for mobile voice communication, it is now the backbone of digital society. Mobile and fibre-optic networks no longer connect only people, but increasingly also machines, infrastructures and entire economic systems. While this development creates enormous potential for innovation, it also poses new challenges in terms of regulation, security and the political framework.

Even the language we use illustrates this shift. The term ‘telecommunications’, once commonplace, now seems almost nostalgic. It dates from a time when communication consisted mainly of telephony, telegraphy and, later, fax. In the face of cloud services, data-driven platforms, artificial intelligence and globally networked infrastructures, this term seems almost like a relic from a different technological era.

In parallel with technological developments, the regulatory framework for telecommunications has also changed significantly. In Europe, the market has been gradually liberalised over recent decades to promote competition and enable innovation.

Regulators face a challenging task in this respect. On the one hand, a framework must be created that enables sustainable investment in network infrastructure. On the other hand, competition must be maintained to ensure innovation and fair prices.

For countries outside the European Union, such as Switzerland, this raises an additional question: to what extent should they adopt EU regulatory developments? National regulations are often closely aligned with European requirements. However, Switzerland has traditionally applied an additional ‘Swiss finish’ – a specially adapted national interpretation of European regulations. Given the speed of technological developments, it is questionable whether additional regulatory complexity is actually beneficial or whether it might instead hinder innovation and investment.

Current developments in the telecommunications industry are showcased every year at the Mobile World Congress (MWC) in Barcelona, which is regarded as the sector’s most important global platform. In 2026, the event once again focused on several key trends.

A dominant theme was the growing use of artificial intelligence in networks and digital services. AI is increasingly becoming an integral part of modern network architectures, enabling automated, more efficient control of complex infrastructures.

There was also increased discussion of hybrid network architectures, which combine terrestrial mobile networks with satellite communications. The aim is to achieve virtually global network coverage, even in remote regions or areas lacking traditional infrastructure.

Finally, research into 6G technologies received greater attention. Many companies and research institutions presented initial concepts for intelligent, AI-supported next-generation networks.

The future of telecommunications will not be determined solely by technological advances, however. Equally crucial will be regulation that is flexible enough to absorb new developments such as artificial intelligence, cybersecurity or future generations of mobile communications without losing sight of the bigger picture.

‘As much regulation as necessary, as little regulation as possible’ remains our guiding principle.

Martin Bürki, President

March 2026

I. AN OVERVIEW OF THE TELECOMS MARKET

The first section of this report provides a selection of data giving an overview of how the Swiss and international telecommunications markets are developing.

For its statistical data, ComCom relies primarily on the figures released by the major telecommunications providers, as well as on publications by the Organisation for Economic Co-operation and Development (OECD), the European Union (EU) and professional bodies or specialised research institutes such as Gartner and IDC. It also draws on a range of data sets and analyses from the Federal Office of Communications (OFCOM)¹ and uses estimates where appropriate.

Further information on the latest developments in the Swiss fixed network and mobile telephony market is available on the ComCom website under 'Facts and figures' (www.comcom.admin.ch).

OFCOM is required by law to compile official telecommunications statistics every year. However, the time required for the annual collection and subsequent processing of providers' data precludes publication of the results within the same year.

Unless otherwise stated, therefore, the official statistical figures provided below are not from the current reporting year. For further information, please consult the OFCOM website (www.bakom.admin.ch).

1. DEVELOPMENT OF MOBILE NETWORKS

The following data for 2025 do not include figures from cable network operators, as these were not yet available at the time of writing. The comparative analysis of customer numbers is limited to the three major network operators (Swisscom, Sunrise and Salt), whose figures also encompass many secondary and tertiary brands active in Switzerland and who cover virtually the entire market. The market shares stated reflect the situation at the end of 2024.

The mobile telephony market, which is now saturated, has remained more or less stable for several years. With a mobile penetration rate of 131.7% at the end of 2024, growth in customer numbers is slowing down (+3.2% between 2023 and 2024).

At the end of 2025, Swisscom had 6,438,000 mobile customers in Switzerland, up 1.7% or +107,000 year-on-year. It gained 185,000 new contract customers (postpaid plans) but lost 78,000 prepaid customers. Sunrise also recorded slight growth of 0.9% over the same period. This operator had 3,159,000 mobile customers at the end of 2025, gaining 82,000 customers in the postpaid segment while losing 55,000 in the prepaid segment. Salt, meanwhile, recorded a significant increase in customer numbers, now standing at 2,254,000 customers (+6.3%). It added around 110,000 postpaid contracts during the year, plus 24,000 customers in the prepaid segment. The figures

from OFCOM's Statistical observatory indicate that Swisscom had a market share of around 53.1% at the end of 2024, while Sunrise had 23.6% and Salt 17.7%. The market share for other operators was 5.5% (see Fig. 1).

For over ten years now, the market dynamic has been driven largely by the contract segment. Users of prepaid offers have increasingly been switching to postpaid contracts, with the proportion of contract customers thus increasing from 62.9% in 2015 to over 84.5% in 2024. The proportion of contract customers has continued to rise at each of the three network operators in recent months, and now stands at 90% at Sunrise, 86% at Swisscom and 82% at Salt.

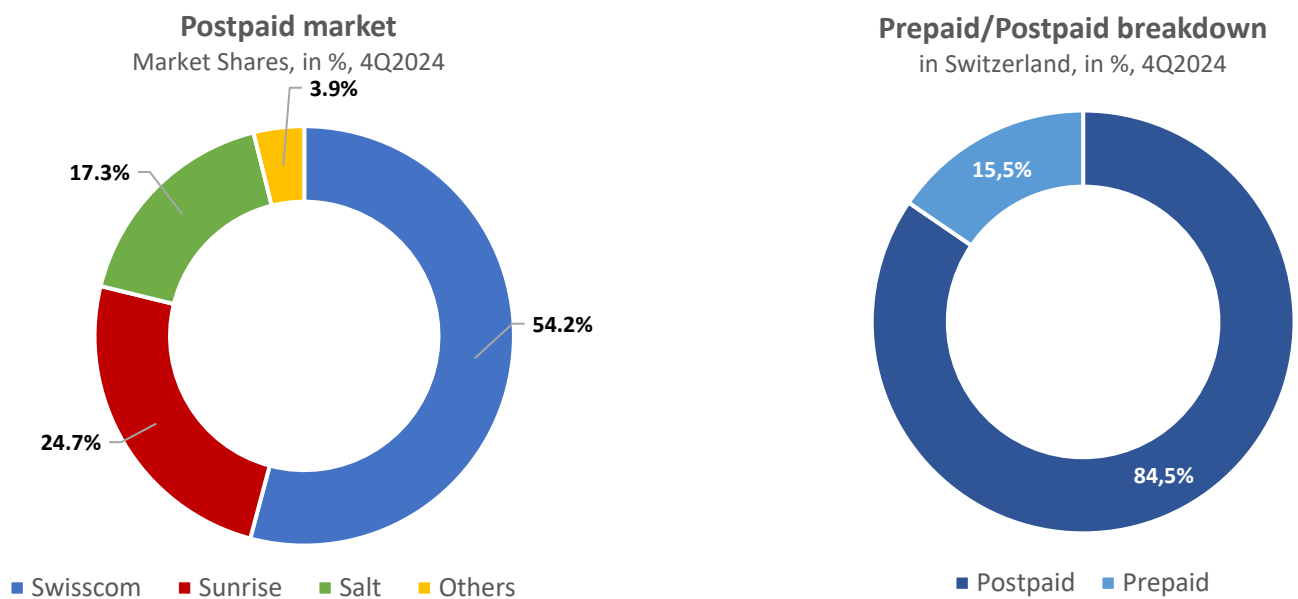
In this segment, at the end of 2024, Swisscom held some 54.2% of the market, Sunrise 24.7%, Salt 17.3% and other operators 3.9%.

Development of the smartphone market

There were more than 8.8 billion mobile contracts worldwide at the end of 2025, according to the Ericsson Mobility Report published in November 2025. This is a year-on-year increase of 2%.

Likewise, the number of smartphone contracts continues to grow. At the end of 2025, they accounted for around 84% of all mobile contracts, amounting to more than 7.4 billion – an increase of 3.9% compared to the previous year. According to estimates in the

¹ All sources used are listed at the end of the report.

Fig. 1: Market shares of mobile telephony providers in Switzerland, 2024

Source: OFCOM, Statistical Observatory

Ericsson Mobility Report, this number is expected to increase by a further 2% annually over the coming years, reaching 8.5 billion smartphone contracts by 2031.

In an environment of economic uncertainty dominated by trade tensions between the US and China, volatile tariff rates and continued reliance on partially unreliable supply chains, global smartphone sales still rose by 1.9% to 1.26 billion devices in 2025, according to data published in mid-January 2026 by the market research firm International Data Corporation (IDC).

In a previous report from early December 2025, IDC had already noted that global smartphone sales in 2025 were mixed, fluctuating between declining demand – particularly in the more price-sensitive low-end segment – and recovery. The upturn was particularly evident in the premium segment, where the latest models persuaded consumers to make a purchase, partly thanks to the integration of AI and foldable devices.

Global sales figures for foldable smartphones are expected to have risen by 10% to 20.6 million devices in 2025. It is anticipated that several new product launches could even boost this growth to 30% in 2026. Overall, while foldable smartphones remain a niche segment in terms of sales volumes, average annual growth of 17% is expected by 2029.

Although short-term forecasts have improved, IDC has revised its growth forecast for 2026 downwards from 1.2% to 0.9%. This is due to a combination of component shortages and changes in product life cycles.

In autumn 2025, Gartner estimated that global spending on smartphones with generative artificial intelligence (GenAI) was expected to reach USD 298.2 billion by the end of 2025, representing 20% of total end-user spending on AI in 2025. Spending on GenAI smartphones is expected to rise by 32% to USD 393.3 billion by 2026, as all manufacturers increasingly integrate AI into their devices and users adopt it more widely. Gartner forecasts that all high-end smartphones will be equipped with GenAI capabilities by 2029.

Growth in mobile data traffic

According to the Mobility Report published by Ericsson at the end of November 2025, global mobile data traffic continues to grow. Annual growth between the third quarter of 2024 and the third quarter of 2025 stood at 20%, slightly exceeding expectations.

Excluding traffic generated by fixed wireless access (FWA), this figure stood at 143 exabytes (EB) per month (143 billion bytes) at the end of 2025. Global mobile data traffic is set to increase 2.2 times by 2031, reaching 310 EB per month. If the traffic generated by FWA is included, the global monthly data volume

at the end of 2025 was 197 EB and is expected to increase 2.4 times to 482 EB by 2031. In the third quarter of 2025, this volume was 188 EB, an increase of 5% over the previous quarter (see Fig. 2).

The volume of mobile data traffic is also continuing to rise in Switzerland. According to figures published by OFCOM, it reached a total of 2.36 billion gigabytes in 2024 (+12.7% compared to 2023).

According to Ericsson, the growth in mobile data traffic is driven by the rising number of mobile contracts linked to smartphones and an increase in the data volumes included in those contracts, which is mainly due to growing consumption of video content. Ericsson estimates that, by the end of 2025, video consumption accounted for 76% of mobile data traffic worldwide. The report also highlights the dominance of short video formats ('shorts') distributed via social media platforms: these account for 70 to 80% of the total data traffic generated by watching videos on smartphones.

The majority of mobile data traffic still uses earlier-generation networks, but the number of 3G and 4G subscriptions continues to fall, and 2G and 3G

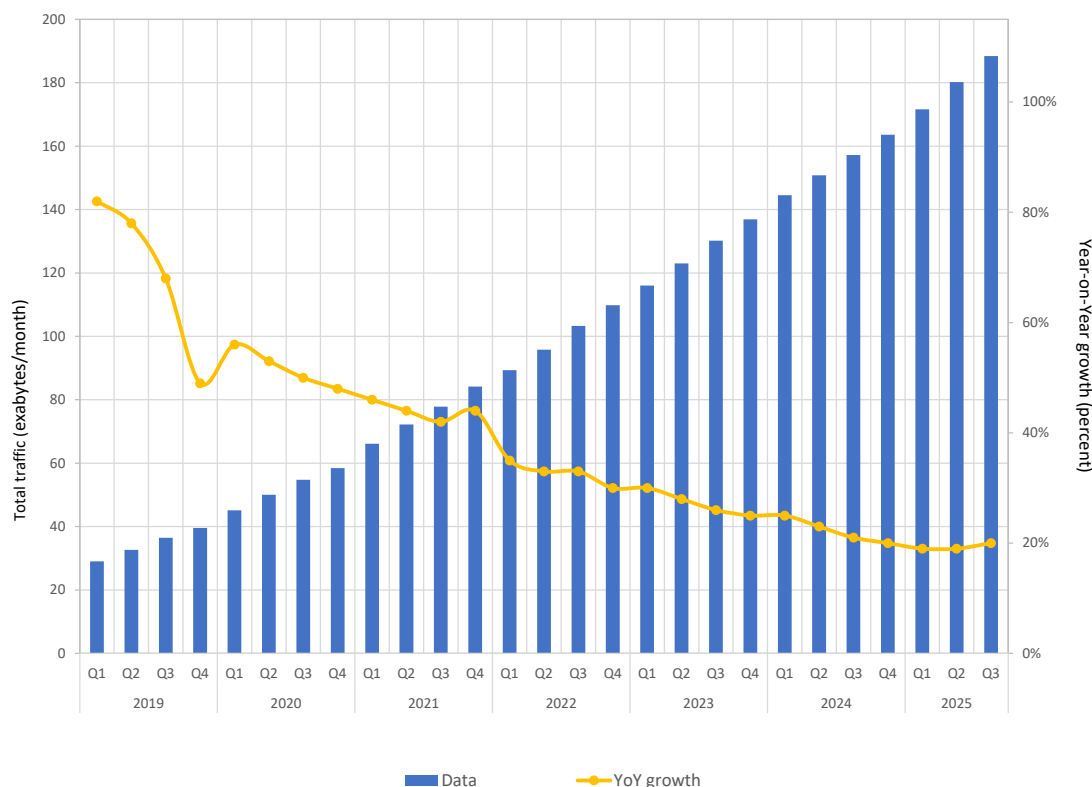
network shutdowns are progressing worldwide. Meanwhile, the share of 5G in mobile data traffic is increasing steadily. By the end of 2025, it was estimated at 43% (compared with 34% at the end of 2024). By 2031, this figure is expected to rise to 83% of global mobile data traffic.

The number of 5G subscriptions is also rising rapidly worldwide: by the end of 2025, there were around 2.9 billion, representing one third of all mobile contracts. This growth is expected to continue, meaning that 5G subscriptions are likely to account for two thirds of all contracts, or a total of 6.4 billion, by 2031.

It is expected that 5G will overtake 4G by the end of 2027, thereby becoming the dominant technology (see Fig. 3).

At the same time, the rollout of 5G Standalone (5G SA) is also gaining momentum. In a report published in November 2025, the Global Mobile Suppliers Association (GSA) lists 181 operators in 73 countries and territories worldwide that have invested in public 5G SA networks, whether in the form of trials, planned rollouts or already completed rollouts.

Fig. 2: Mobile data traffic worldwide, 2019-2025



Data traffic also includes traffic generated by fixed wireless access (FWA) services

Source: Ericsson traffic measurements, February 2026

According to Ericsson, major service providers will continue rolling out 5G SA, and the number of 5G SA subscriptions is expected to exceed 4.1 billion by 2031, covering around 65% of all 5G subscriptions.

In spring 2025, Sunrise became the first network operator in Switzerland to offer 5G SA. The timetable for other operators to launch this technology is not yet known.

Ericsson's Mobility Report also confirms the growth in FWA services, use of which continues to rise worldwide. More than 80% of mobile operators now offer FWA products, and 65% of them provide FWA services over 5G.

Network coverage

Switzerland enjoys almost complete mobile coverage with state-of-the-art 4G and 5G technologies.

Operators are gradually phasing out the less efficient and increasingly obsolete 2G and 3G technologies. This is a global trend.

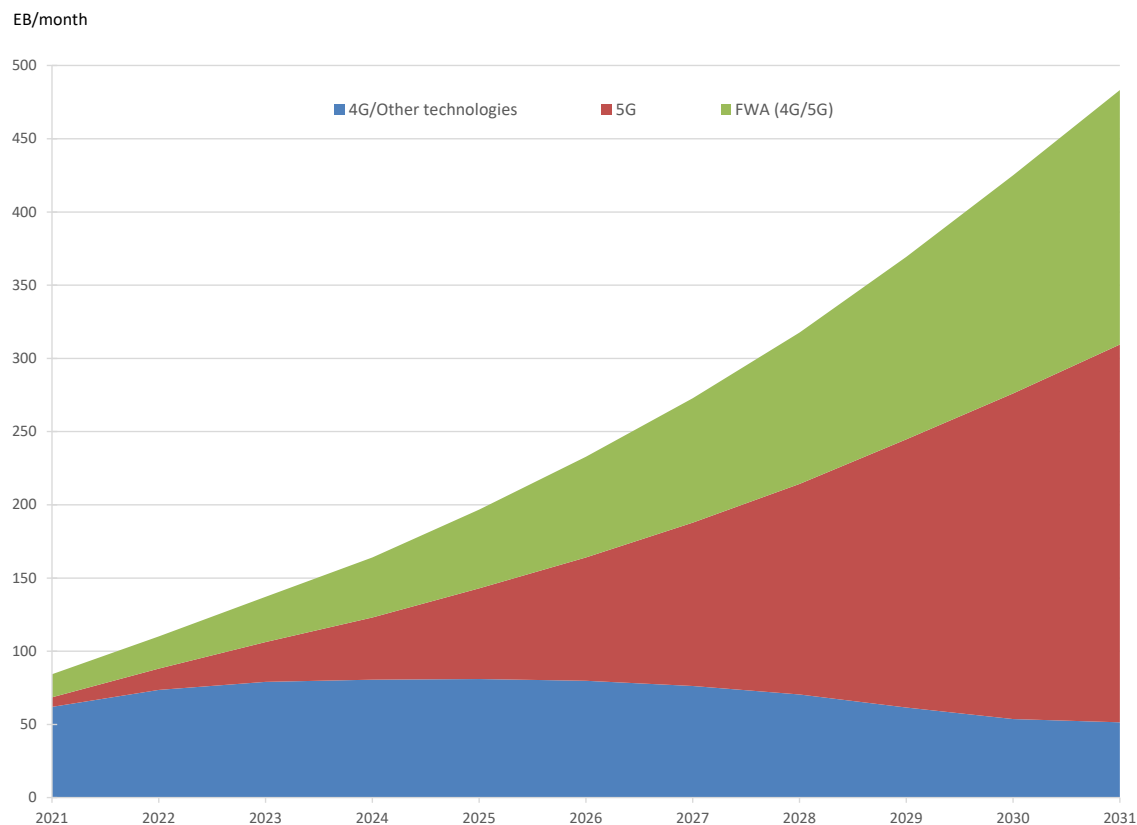
According to a report published in December 2025, the GSA found that 303 operators in 88 countries and regions had either already decommissioned their 2G and 3G networks, were in the process of doing so, or had announced plans to do so by the end of 2025. Of these, 80 operators in 40 countries had already shut down their 3G networks.

Network operators in Switzerland gradually deactivated their 2G networks between 2019 and 2023, and Sunrise also switched off its 3G network in mid-2025. For its part, Swisscom ceased operations of its 3G network at the end of 2025 as announced in spring 2022. Salt has not yet announced a date for switching off its 3G network but is expected to maintain operations until the end of 2026.

The frequencies that this will free up can be used for the latest-generation 4G and 5G. ComCom awarded these mobile communications frequencies as technology-neutral. In other words, the licensee is free to decide which technologies to use with their frequencies.

At the end of 2025, almost 100% of the population was covered by LTE (4G), which was launched in Switzerland over ten years ago.

Fig. 3: Mobile data traffic worldwide, by technologie, 2021-2031



Source: Ericsson traffic measurements, February 2026

If all network generations are included, Salt claims to cover 99.9% of the population. By aggregating 3G, 4G and 5G signals, the Salt network offers transfer rates of up to 750 Mbps when 4G+ and 5G services are available, and up to 1.7 Gbps in regions with 5G+ coverage.

By the end of 2025, Swisscom reached 99% of the population with 5G and transfer rates of up to 1 Gbps, and 88% with 5G+ and transfer rates of up to 2 Gbps. Sunrise covered over 99% with 5G (basic and standalone) and transfer rates of up to 1 Gbps, and 79% with 5G broadband and transfer rates of up to 2 Gbps.

Network quality

Thanks to operators' ongoing investment in modernising their networks, users in Switzerland benefit from increasingly powerful and highly reliable mobile networks. The 2026 edition of the independent test by the German trade journal 'Connect', published at the end of November 2025, compared mobile networks in Germany, Austria and Switzerland, and concluded: 'Despite the already very high performance level, all three Swiss network operators improved once again.'

Swisscom, Sunrise and Salt all received the rating 'outstanding', with the differences between them becoming ever smaller.

Swisscom came out on top in the German-speaking region. With an improvement of six points, the operator achieved its highest ever rating. While this marked its eighth consecutive year as best in test, the magazine also highlighted the remarkable progress made by Salt, which improved by 20 points compared to the previous year. Sunrise, meanwhile, increased its score by two points.

In the 'Voice' category, all three operators received the same total score, albeit with some minimal differences between the individual metrics. Whether in large cities or small towns, on roads or railways, Swiss mobile networks perform to an exceptionally high standard.

The differences between the operators are also negligible in the 'Data' category. Sunrise is slightly ahead of Swisscom in the major cities, while Swisscom performs marginally better in smaller towns. Salt keeps pace with equally impressive performance. As in the 'Voice' category, all three Swiss networks performed well on roads and railways in the 'Data' sector.

'Connect' also highlights the overall high quality of the 5G rollout in Switzerland. Again, the differences between the operators are minimal. Swisscom

achieved the best score and the highest download rates. Sunrise follows a close second, offering its customers a top-rated service. Salt – as is well known launched its 5G network later – lags somewhat behind, but has made great progress in rural areas and also offers an excellent level of service.

Crowdsourced surveys initiated by the magazine – in other words, measurements collected by the users themselves – confirm the test results and emphasise the high quality of Swiss mobile networks with regard to telephony, coverage and download speeds.

Data transfer rates

Mobile communications users in Switzerland benefit from high and ever-faster transmission speeds.

Ookla's Speedtest Connectivity Report for Switzerland, which was published in early summer 2025, analyses network bandwidths and quality based on user measurements collected in the first half of 2025 and confirms the high performance of Swiss mobile operators.

According to this report, Swisscom was the fastest mobile operator in Switzerland with technology-independent download speeds of 133.8 Mbps, followed by Salt with 98.9 Mbps and Sunrise with 85.75 Mbps. On 5G networks specifically, Swisscom achieved average download speeds of 178.25 Mbps, while Salt and Sunrise recorded 120.1 Mbps and 111.3 Mbps respectively.

According to Ookla's latest Speedtest Global Index, a ranking of the speed of mobile phone connections that was published in December 2025, Switzerland comes 36th by international comparison, with average speeds rising significantly over the last twelve months, reaching 126.25 Mbps in November 2025 compared to 97.7 Mbps in December 2024. The top position in the ranking of 103 countries is held by the United Arab Emirates, where users enjoy average download speeds of over 672 Mbps, whereas the global average stands at 103 Mbps. In the ranking of the major cities, Zurich is in 45th place with a transfer rate of 158 Mbps, making it the highest-ranked Swiss city ahead of Geneva, which claims 76th place with 111.5 Mbps.

Switzerland also performs well in Opensignal's Global Network Excellence Index. To compile this ranking, 137 markets were also analysed based on user experience, with the availability, quality and speed of 4G and 5G downloads assessed.

In the latest edition of this ranking, published in October 2025 and dominated by South Korea and the

Nordic countries (Norway in 2nd place, Denmark in 3rd and Sweden in 5th), Switzerland comes in 16th place. The availability of 4G/5G, which measures the proportion of time users are connected to these networks, reaches 96.5%. The average 4G and 5G speeds are 59.2 Mbps and 195 Mbps respectively, which means that Switzerland is ranked 15th and 37th respectively in these two specific categories.

Mobile communications pricing

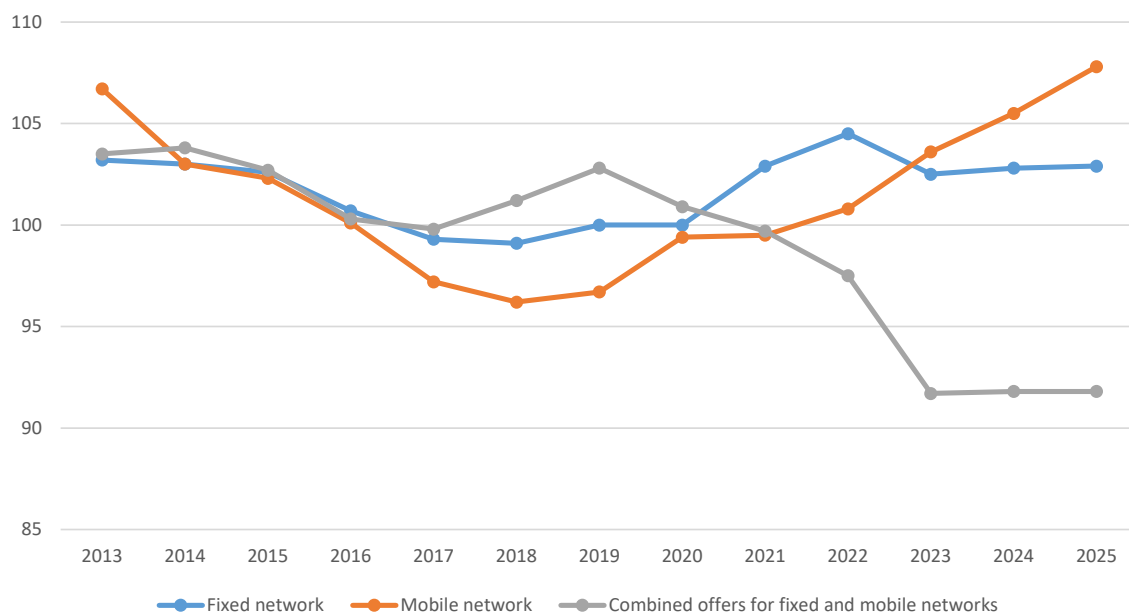
According to the National Consumer Price Index issued by the Federal Statistical Office (FSO), which measures price trends based on a basket of the principal consumer goods and services purchased by Swiss households, the overall index for telecommunications services rose by 0.9% between 2024 and 2025. This figure is significantly higher than the average inflation rate of +0.2% in 2025. The increase is primarily due to higher prices for mobile communications, whose index rose by 2.2% last year (see Fig. 4). After several years of sharp decline, prices for combined fixed and mobile services, which are becoming increasingly popular with customers, have remained stable over the last two years (+0.1% in 2024 and 0% in 2025).

The mobile telephony prices covered by OFCOM's Statistical Observatory, which are based on the lowest rates offered by providers on the Swiss market, reveal considerable differences.

Regardless of the basket under consideration, the cheapest offer can be two to almost three times less than the most expensive.

The best offer for light phone users in 2025 (30 calls, 500 MB) was CHF 11.90 per month at M-Budget, which was about half the cost of the most expensive monthly offer, from Swisscom at CHF 23. For medium usage consumers, the cheapest Salt offer (100 calls and 2 GB of data) at CHF 14.90 is almost 2.7 times cheaper than the equivalent Swisscom offer at CHF 39.90. For customers with high usage needs (unlimited calls, 20 GB), despite a narrowing of the price gap since 2024, there is still a difference of almost CHF 27 between Salt's cheapest offer at CHF 23 and Swisscom's offer of CHF 50, which is more than twice as expensive.

Fig. 4 : Consumer Price Index for Fixed and Mobile Networks Communications, 2013-2025



Base December 2020 = 100

Source : Federal Statistical Office

2. DEVELOPMENT OF FIXED NETWORKS

2.1. ACCESS NETWORKS

Switzerland has several backbone networks and high-quality access networks. Swisscom's access network is available nationwide.

The cable television (CATV) networks are well developed and offer fixed network connections in much of the country. A little over 80% of Swiss households have a CATV network connection.

Several market players have also been constructing fibre-optic networks for over 15 years. In addition to Swisscom and the CATV operators, these are also the public utility companies that use these networks for themselves or make them available to other providers so that they can market their own telecom services.

2.2. FIXED NETWORK TELEPHONY

At the beginning of 2020, Swisscom's last fixed network connections were switched to All-IP – a technology that uses Internet Protocol (IP). The replacement of traditional fixed network telephony with IP technology is a global trend.

As a result of the continued boom in mobile telephony, the downward trend in the number of fixed-network telephone connections in Switzerland continues. The number of these connections fell from 4.2 million to 2.8 million between 2015 and 2024, representing a decline of 30% over 10 years.

The number and duration of calls over the fixed network also declined during the same period. According to figures from OFCOM's Statistical observatory for 2024, the number of calls made fell by 67% over 10 years, from 2.5 billion calls in 2015 to fewer than 850 million in 2024. At the same time, call duration fell by almost 64%, from 10.5 billion minutes to 3.7 billion minutes.

According to OFCOM, just 13% of all calls in Switzerland were made from fixed-network telephones.

2.3. BROADBAND OVER THE FIXED NETWORK

Switzerland has a very high-performance broadband infrastructure. Thanks to competition between different infrastructure providers and services, the population benefits from a wide range of products.

Penetration rates

Switzerland has a high number of broadband contracts for connections over the fixed network. At the end of 2024, 46.4% of the Swiss population had broadband internet access (regardless of the technology used). This makes Switzerland one of the best-connected countries in the OECD, ranking fourth behind South Korea (47.9%), France (47.5%) and Norway (46.5%). The average for OECD countries at that time was 36.5% (see Fig. 5).

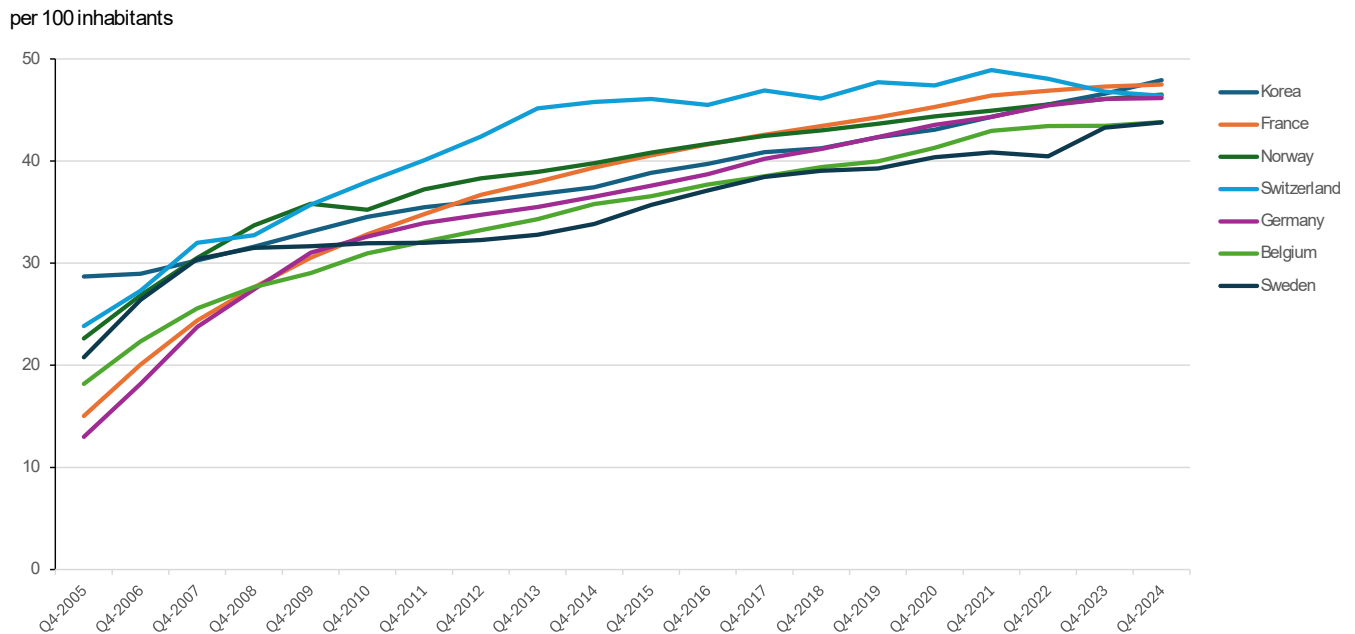
By contrast, Switzerland cannot currently claim to be a world leader in fibre to the home/building (FTTH/B) connections. According to OECD data from late 2024, only 16.4% of the Swiss population had a fibre-optic subscription. This puts Switzerland right in the middle of the pack – slightly below the OECD average (17.1% of the population), but a long way below countries such as South Korea, which has a fibre-optic penetration rate of 43.4% of the population, France or Iceland (35.6%).

Data transfer rates

The German trade magazine 'Connect' has also been investigating the quality and performance of fixed networks in Switzerland for five years. In October 2025, the magazine published a test of fixed networks in Germany, Austria and Switzerland, modelled on its mobile network test. Based on the standardised crowdsourcing method developed by its testing partner 'umlaut', this new evaluation makes it possible to assess the performance levels of network providers in each individual country and also make cross-border comparisons.

'Connect' divides the operators into two categories: nationwide, such as Swisscom and Sunrise, and regional, such as Salt, Quickline and Netplus.

In the category of nationwide operators, Swisscom and Sunrise receive the rarely awarded rating of 'outstanding', attaining scores well above those of operators in Germany and Austria. Sunrise achieves average download rates of 398.8 Mbps and Swisscom 389.9 Mbps. In terms of maximum speed, Sunrise reaches 703.2 Mbps, Swisscom 637.4 Mbps.

Fig. 5: Broadband penetration, top OECD countries, 2005-2024

Source: Broadband Portal - OECD

Among regional operators, Salt significantly outperforms all others and is also awarded the rating of 'outstanding'. Due to their similarly high performance level, Quickline and Netplus receive the rating of 'very good', taking second and fourth place respectively in the ranking. Average download rates are 399.3 Mbps for Salt, 396 Mbps for Netplus and 395.5 Mbps for Quickline. Their respective maximum rates are 807.9 Mbps, 436.3 Mbps and 412.7 Mbps.

Unlike in Germany and Austria, connections with a nominal data rate of 10 Gbps are widespread in the Swiss fibre-optic network. This partly explains the high performance level.

Switzerland's performance by international comparison is relatively good, varying according to the tool or method used. According to data collected by Ookla in December 2025 based on user tests, Switzerland ranks ninth in its classification, with data transfer rates of 278.5 Mbps. The average (median transfer rates in 151 countries) is 115.4 Mbps.

Among Switzerland's neighbouring countries, only France, in fourth place, performs somewhat better with average data transfer rates of 346 Mbps. Austria, Italy and Germany lag far behind, ranking 57th with 114.5 Mbps, 59th with 110.1 Mbps and 64th with 102 Mbps respectively.

It is worth noting that the major providers in Switzerland have since September 2021 provided customers with a standardised instrument for measuring the quality of their own internet access. This is available at www.networktest.ch and in the app stores for mobile devices.

Pricing

According to the National Consumer Price Index issued by the Federal Statistical Office (FSO), prices for fixed-line communication services remained stable in 2025 (+0.1%).

Prices for broadband services from the major providers generally rose, with the exception of Sunrise (–10%, regardless of the basket) and Quickline (–17% for the larger baskets). The difference between the highest and lowest offers is often considerable, as confirmed by the communications price monitoring in OFCOM's Statistical observatory.

Across all price baskets, the least expensive offers are all provided by Sunrise (CHF 52.60 per month), while Swisscom's offers are consistently the most expensive. For small and medium baskets, Swisscom products are 23% more expensive and cost CHF 64.90 in both cases. Swisscom is also the most expensive provider for a large basket, costing CHF 79.90 or 52% more than that of Sunrise.

OFCOM has since 2020 published the survey of prices of product bundles on fixed and mobile networks on its Statistical Observatory website. These products meet the needs of a growing number of consumers who want to purchase all telecommunications services from the same provider. Further information can be found on the OFCOM website.

Structure of the broadband market

Looking at broadband providers as a whole (CATV, DSL and FTTx), figures from OFCOM's Statistical observatory show that Swisscom remains far ahead of its closest competitors, with a market share of around 47% at the end of 2024.

At the end of 2024, Sunrise's market share stood at 28%, Salt's at 6% and Quickline's at 4.5%. The OFCOM data also includes iWay with a 1.9% market share and Green with 1%, as well as 144 other providers which together account for 11.4% of the market.

The number of domestic fibre-optic contracts (FTTH/B) in Switzerland is gradually increasing, with the broadband market almost saturated at around 4.2 million connections at the end of 2024. Growth of the fibre-optic segment is primarily the result of DSL subscribers switching to this technology. At the end of 2024, the estimated number of fibre-optic connections amounted to just over 35% of total broadband connections in Switzerland, or around 1.5 million.

In international comparison, the growth in fibre-optic contracts in Switzerland (+11% between December 2023 and December 2024) is slightly below the average for the OECD (+12.9%) and France (+13.6%). The gap is particularly evident when compared with Austria (+22%), Germany (+23.3%) and Italy (+26.6%).

In terms of fibre-optic usage, Switzerland still lags behind in international comparisons with a figure of 35.2%: in the OECD countries, average fibre-optic penetration in broadband was over 46.9% at the end of 2024. Switzerland is in a better position than most of its neighbours, with 31.1% FTTH/B reach in Italy, 13.7% in Germany and 13.6% in Austria. Only France has a relatively high share of fibre-optic contracts (74.9%) and is thus among the dozen or so OECD countries where this figure exceeds 70% (see Fig. 6).

For OECD countries, it should be noted that fibre-optic connections (46.9% at the end of 2024) have outperformed cable connections since 2022 (27.8%) and that fibre optics has become the most important technology for fixed broadband connections. Copper-based DSL technology, which is steadily losing importance, accounted for just 16.9% of broadband

contracts at the end of 2024. In Switzerland, too, the share of fibre-optic lines (35.5%) is higher than that of CATV (23.9%), although DSL (40.5%) remains the dominant technology.

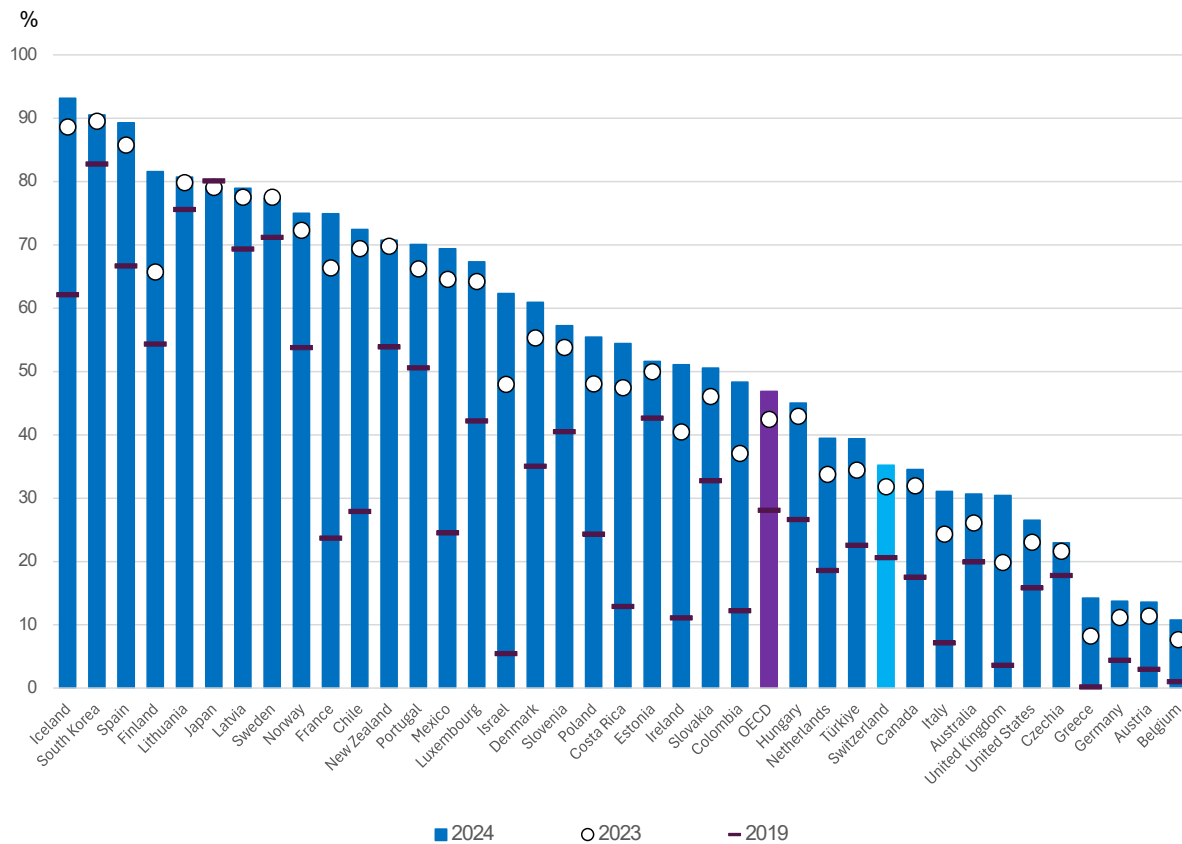
Expansion of ultra-high-speed broadband networks

In contrast to its superior ranking in the provision of broadband services via hybrid fixed networks, Switzerland is not a world leader when it comes to fibre to the home (FTTH).

Most EU countries have a state ultra-fast broadband strategy; the expansion of fibre optics is therefore continuously supported by the state. The EU itself has set the target of 2030 – the end of the 'digital decade' – as the date by which all households in Europe should have gigabit connectivity. In its 'State of the Digital Decade 2025' report, the EU states that overall coverage with fibre to the premises stands at 69.2% and notes that it is lagging behind its target (100% by 2030). In May 2024, the EU's new Gigabit Infrastructure Act also came into force. The Act updates the regulations to make the rollout of gigabit networks faster, cheaper and easier. Measures for this include coordinating construction work, sharing infrastructure and simplifying administrative procedures with the aim of reducing development costs.

For the last 15 years, various players in Switzerland have also been investing considerable sums of money in rolling out the use of fibre optics in the access network. Since 2008, over CHF 1 billion a year on average has been invested in the renewal of the fixed network infrastructure (see OFCOM's telecommunications statistics). Exact figures on the nationwide investments in the FTTH rollout are not yet available. Swisscom, for example, mentions in its 2025 Annual Report investments totalling CHF 723 million in the fixed-line network, considerably more than its investments of CHF 259 million in the mobile network or CHF 121 million in backbone and infrastructure (Annual Report 2025, p. 47). Swisscom last provided specific details on the fibre-optic expansion for 2023: at that time, investment in FTTH stood at CHF 466 million. According to the FTTH Council Europe, around 72% of households will have a fibre-optic connection by the end of 2025.

Infrastructure competition has also played a key role in fibre-optic expansion over the last 15 years: CATV operators have continuously modernised their networks based on various DOCSIS standards, and fibre-optic cables have also been laid ever closer to buildings within CATV networks. This has enabled them to offer high-speed internet access similar to pure fibre-optic networks (1 Gpbs), which has in-

Fig. 6: Fibre optic connections relative to all fixed broadband contracts, 2019-2024

Source: Broadband Portal - OECD

creased competitive pressure. In addition, more and more CATV companies have decided to invest in a comprehensive FTTH network.

For more than 15 years, fibre-optic lines have been built to the customer's homes in numerous cities and regions by local energy supply companies (distribution network operators, DNOs) – often in cooperation with Swisscom (FTTH). As part of these cooperative ventures, the partners work together to build a local FTTH network and each then generally has a P2P optical fibre right into the homes.

Many of the cooperations started since 2008 have now been completed, while others are likely to be in their final stage. The larger cities, as well as many smaller towns and communes, have been connected based on cooperative ventures such as these. However, there appear to be more communes where Swisscom is investing in fibre-optic expansion on its own. Unfortunately, no general overview of the current partnerships is available; however, Swisscom has published a map on its website featuring an interactive tool that allows users to check the fibre-optic rollout status for all communes in Switzerland (see

www.swisscom.ch). According to the Federal Council's evaluation report (p. 11), Swisscom entered into a total of 24 new partnerships between 2019 and 2022. As of 2022, 1.34 million or two thirds of FTTH connections available for Swisscom to market had been installed through a total of 72 partnerships.

There are other market participants in Switzerland who are investing in new fibre optic infrastructure and stimulating competition in the fibre-optic sector:

Swiss4net independently invests in local fibre-optic networks. It plans, builds and finances FTTH networks in P2P architectures (P2P) in locations where it can share use of the necessary piping systems of the commune or the DNO over the long term (see www.swiss4net.ch). Swiss4net is investing in at least eight local fibre-optic networks in all parts of the country. Various telecom providers deliver their services via the networks operated by Swiss4net.

In contrast, Swiss Fibre Net AG (SFN) is an association of energy suppliers that cooperate in marketing their local fibre-optic networks. It comprises five shareholders – the utility providers for the cities of

Bern, Lucerne and St Gallen, plus the network carriers Danet (Upper Valais) and Didico (Meilen-Herrliberg). The SFN association is growing continuously and currently includes 66 network partners.

SFN offers service providers that do not have their own access networks (e.g. Init7, iWay, GGA Maur, Salt, Sunrise and VTX) the opportunity to use a shared platform to source standardised FTTH products from partner networks for resale. It also offers mobile operators fibre-optic connections for mobile communications antennas.

SFN has also modified its strategy somewhat in recent years: it no longer focuses solely on marketing partner networks' FTTH connections via the 'Alex' ordering platform. Instead, it is now increasingly engaged in planning, implementing and operating FTTH networks within regional partnerships. To this end, SFN founded Swiss FibreCo AG (SFC) in 2022, a subsidiary involved in constructing fibre-optic networks and thus helping to increase the number of connections available for SFN to market. Examples of such projects include Davos, where SFC supports EW Davos in cooperation with Swisscom, and the comprehensive rollout project by Elektrizitätswerk Nidwalden (see www.swissfibreco.ch).

FTTH proceedings at COMCO

In many places, however, Swisscom is investing in the modernisation of its fixed network even without a collaborating partner. For a long time, it primarily relied on a technology mix of copper cable and fibre (FTTC or FTTS). Since about 2020, Swisscom has increasingly been routing fibre directly into households. In doing so, it has, at least in part, used Point-to-Multipoint (P2MP) network architecture.

In December 2020, the Swiss Competition Commission (COMCO) opened an investigation into whether this network architecture favoured by Swisscom was permissible under competition law. By way of precautionary measures, COMCO prohibited Swisscom 'from denying competitors access to continuous lines when expanding the fibre-optic network' (COMCO press release dated 17 December 2020). Swisscom was no longer allowed to market the connections that it had already built using P2MP architecture.

During the ongoing COMCO process, Swisscom announced in October 2022 that it intends to 'largely implement new connections in point-to-point architecture (P2P) and partially convert existing P2MP connections to P2P' (Swisscom media release dated 27 October 2022).

On 25 April 2024, COMCO published its decision on Swisscom's FTTH network construction strategy. According to COMCO's press release, Swisscom had, in places where it had used P2MP network architecture, deprived competitors of the opportunity to lease end-to-end fibre-optic connections to end customers and 'created a de facto monopoly for itself' (COMCO press release dated 25 April 2024). COMCO fined Swisscom around CHF 18 million and set it targets for expanding the fibre-optic network. This notably includes an obligation for Swisscom to expand the fibre-optic network in such a way that its competitors can lease dark fibre and provide their own services ('layer 1 access'). This decision by COMCO is not yet legally binding at the end of 2025, as Swisscom has filed an appeal.

By the end of 2025, Swisscom had connected 56% of homes in Switzerland to the fibre-optic network. According to its 2025 Annual Report, Swisscom also plans to connect 75 to 80% of households and businesses with FTTH by 2030. Swisscom states that its ultimate goal is that 'virtually the entire population should have internet access with bandwidths in the gigabit range by 2035' (see Swisscom Annual Report 2024, p. 81).

This network expansion is also of great importance to Swisscom because it plans to gradually decommission the old copper telephone network in the coming years, 'before taking it completely out of service after 2035' (see Swisscom Annual Report 2025, p. 27). According to Swisscom, decommissioning the copper network will reduce the complexity of the networks and systems and lead to energy savings of around 100 GWh, which is equivalent to the annual electricity consumption of a town with 20,000 inhabitants (see Swisscom website).

The Federal Council's Gigabit strategy

So far, FTTH expansion in Switzerland has largely been market-driven, without financial support from the federal government. To date, there have been no politically defined provision targets and no financial support models in Switzerland. This is unlike EU countries, which have been promoting broadband development for some time under national strategies.

Despite all the rollout targets set by private companies, a certain proportion of households – typically in peripheral areas – can never be connected to fibre-optic networks in a commercially viable manner.

Against this backdrop, the Federal Council presented a report in June 2023 containing proposals for a Swiss very high-speed broadband strategy and subse-

quently announced its 'gigabit strategy' in December 2023. The aim is to achieve nationwide coverage of at least 1 Gbps. From ComCom's point of view, this is an important target that will allow both businesses and the general public throughout Switzerland to benefit from digitalisation.

On 14 March 2025, the Federal Council opened the consultation procedure on the new Broadband Promotion Act (BPA), which further details the gigabit strategy. The subsidy programme stipulates that the initiative for the development projects to be supported must come from the local authorities. The cantons should also play an important role in this process by examining whether the expansion projects are eligible for funding. According to the consultation draft, the cantons and the federal government would each contribute half of the required funding. In addition, the federal government intends to cover a maximum of 25% of the eligible costs incurred as a result of the network expansion and the operation of the passive infrastructure (Art. 6 D-BPA).

Communes are eligible for funding if they include areas in which no expansion is planned for the coming years and in which network expansion is demonstrably financially unviable. The funding programme has a limited duration (proposal in the consultation draft: seven years) and may be extended once by a period of three years. The funding is to be capped at CHF 730 million, of which the federal government will pay up to CHF 365 million. As communicated in December 2023, these federal funds are to be covered through revenues from mobile frequency allocations. ComCom welcomes this funding programme and the proposed financing (see also below).

According to the estimates in the draft bill, up to 10% of homes and businesses in around 700 communes could be affected by this funding programme. The focus is on fibre-optic connectivity, but a small number of locations where fibre-optic expansion would be particularly costly could also be connected via FWA. The Federal Council's dispatch to Parliament is expected in 2026.

II. COMMISSION AND SECRETARIAT

1. COMMISSION

ComCom is an independent, extra-parliamentary commission tasked with licensing and market regulation in the telecommunications sector.

Under the Swiss Telecommunications Act (TCA), ComCom's main tasks are:

- ♦ Granting licences for the use of radiocommunications frequencies (Art. 22a TCA)
- ♦ Awarding the universal service licence (Art. 14 TCA)
- ♦ Determining access prices and conditions when service providers fail to agree among themselves (Art. 11a TCA)
- ♦ Determining conditions of access to the building entry point and the joint use of installations within buildings in the event of disputes between telecommunications service providers (Art. 35b TCA)
- ♦ Imposing measures and sanctions in the event of violations of applicable law in connection with a licence granted by ComCom (Art. 58 TCA).

The Commission comprises seven independent experts appointed by the Federal Council.

In 2025, it comprised the following members:

- ♦ **Christian Martin**, President (until March 2025), Electrical Engineer (School of Engineering), Managing Director and Owner of Martin Engineering AG
- ♦ **Martin Bürki**, President (since August 2025), Sports Scientist and Historian (University of Bern), Executive MBA from Bern University of Applied Sciences, CEO of Ericsson Switzerland AG from 2011 to 2025
- ♦ **Stephanie Teufel**, Vice-President, Ph.D in Computer Science, independent scientific consultant, Emeritus Professor at the International Institute of Management in Technology at the University of Fribourg
- ♦ **Christine Benesch**, Dr. oec., Product and Project Manager at frentix GmbH in Zurich, lecturer on the Bachelor's degree programme in Business Administration at the Zurich University of Applied Sciences (HWZ)
- ♦ **Matthias Grossglauser**, Doctor of Information Technology, Professor at the Swiss Federal Institute of Technology Lausanne (EPFL)
- ♦ **Patrick Krauskopf**, Doctor of Laws, lawyer, professor at the Eastern Switzerland University of Applied Sciences (OST) in St Gallen and at the Zurich University of Applied Sciences (ZHAW)
- ♦ **Jean Christophe Schwaab**, Dr. iur., Member of the Communal Council of Bourg-en-Lavaux
- ♦ **Flavia Verzasconi**, Lawyer and Notary, President of the Administrative Court of the Canton of Ticino

At its meeting on 30 April 2025, the Federal Council elected Martin Bürki as president of the Commission. He succeeded Christian Martin, who stepped down from the role for personal reasons at the end of March 2025. The Commission extends its sincere thanks to Mr Martin, who has been a member since 2018 and president since 2024, for his dedication and significant contribution to ComCom's work.

Martin Bürki began his term as president on 1 August 2025. From April to July 2025, Vice-President Stephanie Teufel led the Commission on an interim basis.

The Commission generally holds meetings once a month. In addition, ComCom regularly makes decisions by written procedure. In the summer of 2025, the Commission also met extra muros at a retreat to prepare for the upcoming mobile frequency allocation.

2. SECRETARIAT

The Commission is assisted by its own Secretariat, which is responsible for management and public relations. The Secretariat coordinates the Commission's activities with OFCOM, which prepares ComCom business and generally implements its decisions.

The Secretariat consists of a Commission secretary (90%), a scientific collaborator and webmaster (80%), and an administrative assistant (70%).

After ten years in the Secretariat, Jacqueline Fischer Pulfer retired at the end of 2025. The Commission and the Secretariat would like to thank her warmly for her valuable contribution and her dedication. The Commission appointed Karin Haag as her successor, and she took up her post at the beginning of December 2025.

The Members of the Secretariat will be happy to provide you with any information you might require:

- ♦ **Peter Baer**, Secretary of the Commission
- ♦ **Pierre Zinck**, Scientific Collaborator and Webmaster
- ♦ **Karin Haag**, Administrative Assistant.



The 2025 Commission (from left to right): Flavia Verzasconi, Christine Benesch, Matthias Grossglauser, Martin Bürki (President), Patrick Krauskopf, Stephanie Teufel (Vice-President) and Jean Christophe Schwaab (*Photo: Sandra Stampfli*)

III. ACTIVITIES OF THE COMMISSION

The following sections provide an overview of ComCom's activities in 2025.

1. ACCESS CASES

To facilitate competition in the telecoms market, the Telecommunications Act (TCA) requires dominant telecoms service providers to provide other operators with access to their infrastructure and services in certain areas in a transparent and non-discriminatory manner at cost-based prices.

The four areas remaining since the last revision of the Act in 2019 in which such access must be granted if a provider is dominant are listed in Article 11 paragraph 1 TCA:

1. Full local loop unbundling (only applies to copper lines)
2. Interconnection
3. Leased lines
4. Access to cable ducts, provided these have sufficient capacity.

In the 2019 revision of the TCA, parliament decided not to introduce technology-neutral network access regulation. However, the new Article 3a TCA requires the Federal Council to present an evaluation report on the development of the telecoms market every three years and submit proposals to promote effective competition where necessary.

In March 2024, the Federal Council submitted its first evaluation report to Parliament. In this report, the Federal Council stated that Switzerland has a reliable and affordable universal service and that the overall competitive situation is stable.

Only in the area of fibre-optic connections to homes (FTTH) has the situation become more dynamic.

However, the evaluation report also states that the expansion of fibre optics is mainly confined to profitable parts of the country. Supply gaps in rural areas continue to exist. To ensure that very high bandwidths become available nationwide for fixed network connections in the longer term, the Federal Council mandated the development of a gigabit strategy in

December 2023. Ultimately, the Federal Council has decided not to propose any legislative amendments to promote competition pursuant to Article 3a TCA at this time.

The following section briefly describes the access cases involving ComCom in 2025.

1.1. INTERCONNECTION AND OTHER FORMS OF ACCESS PURSUANT TO ART. 11 TCA

In February 2019, ComCom issued partial decisions on disputed access prices in the following cases:

- Sunrise vs Swisscom concerning prices for interconnection, unbundling, leased lines and cable ducts for the years 2013–2016
- Salt vs Swisscom concerning the prices for interconnections and leased lines for the years 2014–2016

In two judgments of 16 July 2021 on the appeals filed by the parties, the Federal Administrative Court confirmed the approach taken by ComCom on many points, but it also referred a number of points of contention back to ComCom for reassessment (A-1286/2019 and A-1496/2019; cf. www.bvger.ch).

The points raised by the court were addressed as part of the instruction by OFCOM. This involved in particular re-examining certain aspects relevant to price calculations in greater depth or providing more detailed justifications for individual decisions.

In April 2023, ComCom once again ruled on the disputed access prices for the years 2013 to 2016. As one of the parties has again contested these decisions, two appeals have been pending before the Federal Administrative Court since 2023. ComCom expects the relevant rulings to be handed down in 2026, thereby creating a stable foundation for continuing the proceedings, which have spanned many years.

1.2. INTERCONNECT PEERING

In the access case between Init7 and Swisscom regarding peering, ComCom rejected Init7's application in July 2018. ComCom had assumed that competition in the field of peering was functioning properly (see 2018 ComCom Activity Report).

However, Init7's appeal against this decision was upheld by the Federal Administrative Court on key points and referred back to ComCom for a reassessment (Federal Administrative Court judgment of 22 April 2020, A-5235/2018). With regard to the period from 2013 to January 2016, the court judged Swisscom to be a dominant undertaking in terms of Article 4 paragraph 2 Cartel Act. The court called for the question of market dominance in the period thereafter to be clarified.

The Competition Commission (COMCO) was subsequently invited to prepare an expert opinion on the question of market dominance from 2016 onwards. In its expert opinion of 25 October 2021, COMCO concluded that 'because of the non-customary combination of two standard market contract types (peering and transit) with DTAG' (Deutsche Telekom AG), Swisscom held a dominant position over those providers who are not in a position to enter into a peering agreement with DTAG (see COMCO's publication series RPW, 2022-2, p. 545ff.).

OFCOM then resumed the proceedings and, following extensive clarifications and complex correspondence spanning several years, submitted a draft decision to ComCom in autumn 2024.

Ultimately, in December 2024, ComCom concluded that a 'zero settlement peering' arrangement exists between Init7 and Swisscom. In a 'zero settlement peering' arrangement, both contracting parties bear their own costs, irrespective of the amount of data transferred in either direction.

ComCom noted that peering traffic – for example, from a content provider to the end customers of an internet service provider (ISP) – occurs when the end customers retrieve specific content via the internet.

End customers pay the ISP a subscription fee for their internet connections and, in return, receive worldwide access to websites and content providers. According to the ComCom decision, this internet subscription also covers transport of the data requested by end customers via their ISP's network (in this case, Swisscom).

Any additional costs incurred in the ISP's network by providing end customers with access to the internet are assigned to the ISP's internet subscription service.

ComCom concluded that the peering between Init7 and Swisscom therefore does not result in any relevant additional economic costs for the ISP that are not already covered by the fees paid by end customers for their internet connections. Accordingly, a fee for peering is not justified.

As Swisscom was classified as having a dominant market position in relation to peering, it must offer Init7 peering in a non-discriminatory manner at a price of CHF 0.00 ('zero settlement peering').

After one of the parties contested this ComCom decision before the Federal Administrative Court, an initial exchange of written submissions took place in 2025.

1.3. ACCESS TO THE BUILDING ENTRY POINT AND INSTALLATIONS WITHIN BUILDINGS

During the latest revision of the Telecommunications Act, a new provision, Article 35b, was inserted. It reads as follows: 'Every telecommunications service provider shall have a right of access to the building entry point and of joint use of the installations within the building intended for telecommunications transmission provided this is technically justifiable and there is no other good cause for refusal' (Art. 35b para. 1 TCA). This provision has been in force since 1 January 2021.

In February 2023, a telecommunications service provider made a request for access to the building entry point and to the inhouse installations built by a fibre-optic network operator. The latter considered that it was not subject to the provision of Art. 35b TCA because it did not offer any telecommunications services itself.

For reasons of procedural economy, OFCOM proposed to ComCom that the fundamental question of the obligation to offer access be clarified first, before any complex price calculation was undertaken.

In interpreting the law, OFCOM and ComCom concluded that there was a legal loophole in Article 35b paragraph 2 TCA regarding the scope of those subject to the obligation to offer access. Although the respondent was not a provider of telecommunications services, it nevertheless fell within the scope of Article 35b TCA due to the identified loophole in the law. A finding of 'qualified silence' was rejected.

Accordingly, in December 2023, ComCom ruled that the respondent was subject to the obligation to offer access and must grant the applicant access to the building entry point and shared use of the building's installations (see ComCom decision of 20 December 2023, online: <https://www.comcom.admin.ch>).

This ComCom decision was challenged by one of the parties in early 2024, and the Federal Administrative Court dismissed this appeal in its judgment of 13 October 2025. The Federal Administrative Court also concluded that there is a genuine loophole in Article 35b paragraph 2 TCA and that 'dark fibre providers also fall within the scope of this provision' (see Federal Administrative Court A-702/2024 of 13 October 2025, para. 6.7). The Federal Administrative Court's judgment in these proceedings has been published in its decision database (<https://www.bvger.ch>).

The party that was unsuccessful before both ComCom and the Federal Administrative Court has lodged an appeal with the Federal Supreme Court (as the second appeal authority in these proceedings).

2. LICENCES

Under the Telecommunications Act, ComCom is responsible for granting radio communications licences for the provision of telecommunications services (Art. 22a TCA) and the universal service licence (Art. 14 TCA).

ComCom has permanently delegated to OFCOM the task of awarding radiocommunications licences that do not use a scarce frequency spectrum and are therefore not subject to a public tender (e.g. licences for private companies' radio networks). Information concerning licences awarded by OFCOM can be found at www.bakom.admin.ch.

The following overview deals only with licences awarded by ComCom itself.

2.1. UNIVERSAL SERVICE

The universal service comprises a basic range of telecoms services of a good standard which must be offered throughout the country at an affordable price to all sections of the population. These services are designed to allow all sections of the population to participate in society and the economy. The universal service also includes special services that ensure that those with disabilities have various communications options.

The provisions that are part of the universal service are periodically adjusted by the Federal Council to meet social and economic needs as well as the state of the art. The services included in the universal service and the price ceilings were last redefined by the Federal Council in the Ordinance on Telecommunications Services, with effect from the start of 2024 (see Art. 15 and Art. 22 OTS).

Since the beginning of 2024, the universal service licensee has had to offer the following telecom services throughout Switzerland (Art. 15 OTS):

- ♦ Services for people with disabilities:
 - For the hearing impaired, a round-the-clock transcription service, which also covers emergency calls, and a text message intermediary service. Moreover, since 2018, there has been a daytime relay service for sign language users via video telephony.
 - For the visually impaired and people with reduced mobility, there is a round-the-clock directory enquiries and operator service which guarantees access to the directory data of customers of all providers at all times, using the 1145 number.
- ♦ A telephone line with a telephone number (at the price of CHF 23.45 per month excl. VAT).
- ♦ A directory entry (each household may request a second entry free of charge).
- ♦ An internet connection in two variants:
 - a) with a transfer rate of 10 Mbps download and 1 Mbps upload (for CHF 45 per month excl. VAT),
 - b) with a transfer rate of 80 Mbps download and 8 Mbps upload (for CHF 60 per month excl. VAT).

The new broadband internet access option providing 80 Mbps, available as part of the universal service since the beginning of 2024, is unique within Europe. Implementation is technology-neutral, meaning the universal service licensee can provide customer access either via a physical line or, if required, using mobile or satellite-based solutions. The licensee may also refuse to install or upgrade a connection if the cost of doing so exceeds CHF 12,700 and the customer does not pay the costs in excess of this amount.

A subsidiarity principle also now applies to the universal service: if an equivalent alternative is already available on the market, the universal service obliga-

tion is deemed to be fulfilled in that location and the licensee is not required to provide a universal service. This protects investments already made and prevents duplication of coverage at unprofitable locations.

Universal service licence

The universal service licence is awarded by ComCom by means of an invitation to tender and a criteria-based competition if there are two or more interested parties (Art. 14 TCA and Art. 12 OTS). However, if no – or only one – interested party comes forward, ComCom designates the licensee (in accordance with Art. 14 para. 4 TCA).

In May 2023, ComCom awarded Swisscom the universal service licence for eight years. This new licence runs from 1 January 2024 to 31 December 2031.

The Federal Council has defined quality criteria for universal service provision in Article 21 OTS, which the licensee must fulfil. As the market supervisory authority, OFCOM checks annually (based on reports from Swisscom) whether the licensee is providing the universal service to the required standard. Swisscom has consistently fulfilled these quality criteria, including in 2025. Furthermore, ComCom did not receive any complaints from consumers relating to the universal service in 2025.

2.2. MOBILE RADIO COMMUNICATIONS LICENSES

In the 2012 auction, the mobile frequencies from the GSM and UMTS licences (900, 1800 and 2100MHz bands) and the new spectrum (800 and 2600MHz bands) were auctioned. Demand for both the new and existing frequencies in the 2012 auction was high, resulting in substantial proceeds of CHF 996 million.

In 2019, new frequencies in the 700MHz, 1400MHz and 3500–3800MHz bands were also allocated for mobile radio communications use at a cost of CHF 380 million (see the 2012 and 2019 Activity Reports for more information on these auctions). As a result, the three mobile network operators each hold two licences; those from 2012 will expire at the end of 2028 and those from 2019 in April 2034, after a 15-year term.

ComCom awarded these frequencies on a technology-neutral basis. This means that operators can decide for themselves which internationally recognised technologies they want to use. Similarly, network operators are independently responsible for deciding when they want to decommission older, less efficient technologies (such as 2G or 3G) and for informing

their customers in good time (for more on the 3G shutdown, see section I.1 above on p. 7).

OFCOM and ComCom monitor compliance with the rights and obligations set out in the licences. It should be noted that the network operators have complied with their licences in recent years. For instance, Salt, Sunrise and Swisscom have more than fulfilled the coverage obligations specified in the licences. Due to competitive pressure among network operators, Salt, Sunrise and Swisscom offer high-quality mobile services across almost the entire country (for more on this, see section I.1, p. 8).

Preparations for the reallocation of mobile frequencies

The mobile telephony licences from 2012 cover the key frequency bands of 800MHz, 900MHz, 1800MHz, 2100MHz und 2600MHz and thus the ‘core’ of the mobile spectrum. The licences expire at the end of 2028, and it is ComCom’s responsibility to reallocate these frequencies in good time.

The preparation and implementation of a frequency allocation procedure take several years. OFCOM therefore launched a public consultation on behalf of ComCom at the end of 2023 to identify the needs of the mobile communications sector and other stakeholders in these frequency ranges. This firstly related to the frequency bands that are due to be reallocated. Secondly, it also included questions on frequencies in the new 6GHz, 26GHz and 40GHz ranges, which until now have been used for applications other than public mobile communications.

OFCOM received 33 comments on this from network operators, industry and trade associations, blue light organisations, private individuals, and federal and cantonal authorities. A detailed summary of the submissions and all the comments were published on the OFCOM website on 8 July 2024 (see www.bakom.admin.ch, ‘Consultations’, and the brief summary in ComCom’s 2024 Activity Report).

Only existing frequencies from 2012 to be allocated

After evaluating the comments, ComCom decided in June 2024 that only the frequency bands allocated in 2012 will be included in the next mobile frequency allocation. The allocation of new spectrum in the ranges 6GHz, 26GHz or 40GHz will not go ahead, as there is currently only limited interest in these frequencies and they are still partly in use for other purposes (see www.comcom.admin.ch, press release of 9 July 2024). In addition, the Federal Council would first have to approve the use of these frequencies for mobile

communications in the National Frequency Allocation Plan (NFAP).

Allocation by invitation to tender

In July 2024, ComCom announced that it would invite tenders for the mobile frequencies in a transparent and open procedure for all interested parties. One of ComCom's aims for the allocation is to ensure an efficient and competitive allocation of scarce frequency resources and to maintain the high quality of the mobile communication networks. As frequencies are a scarce public resource and are granted to licence holders for exclusive use for many years, a fair price must be paid for them.

In the consultation held at the end of 2023, the existing mobile network operators proposed an extension of their licences. However, a direct extension of the existing licences would make it impossible for a new competitor to enter the market for many years to come. In the interests of competition, ComCom therefore decided in 2024 to conduct a public tender, as this is the only way to definitively ascertain whether there are any new interested parties wishing to provide mobile services using their own terrestrial infrastructure.

In an invitation to tender, all interested companies may apply to participate in the award procedure. All companies that meet the eligibility criteria set out in the tender documents will be admitted by ComCom to the award procedure.

Second consultation on a specific proposal for action

In autumn 2025, OFCOM conducted a second public consultation on a specific proposal for action on behalf of ComCom.

The consultation proposed that, in the event of a spectrum shortage – as in 2019 – a two-stage auction should be held, consisting of a simple clock auction (CA) and an allocation phase involving a single bidding round. If, during the bidder admission process, it becomes apparent that demand for spectrum does not exceed the available supply, then only the allocation phase – a single-round auction with sealed bids – would be carried out.

This approach, as well as the allocation via a clock auction (CA), proved successful in 2019. A CA is a simple auction format that allows simultaneous bidding on all the frequency categories. The current operators and any interested companies can take part under identical conditions.

In the consultation in autumn 2025, ComCom put forward a possible change to the allocation design for discussion. In order to maintain the current level of competition among operators, 'spectrum portfolios' could be offered in addition to 'bidding restrictions' (as in 2012 and 2019). By selecting such a portfolio, bidders could acquire a minimum allocation of spectrum even before the auction.

Four comments were submitted during the consultation, and these were published on the OFCOM website in December 2025 (see www.bakom.admin.ch, 'Consultations'). OFCOM and ComCom have begun evaluating these comments. ComCom will decide on the structure of the allocation procedure and the exact timetable in the course of 2026. ComCom is planning to launch the public tender for these frequencies, likely in 2026. The auction is scheduled to take place in 2027.

3. RESPONSES TO CONSULTATIONS

ComCom responded to three consultations launched by the Federal Council in 2025:

1) Broadband Promotion Act

Fibre-optic connections have been available in homes and businesses (FTTH) in Switzerland for over 15 years. This network expansion is market-driven and has so far been carried out without financial support from the federal government; this is in contrast to many EU countries, which have been providing financial support for broadband expansion for some time.

It makes sense that the communes, which are most familiar with local conditions, should initiate the expansion projects, while the cantons review and approve them. In ComCom's view, communes should be supported by an advisory body during the planning and implementation phases.

ComCom also supports the following key points. Federal subsidies should be covered by the proceeds from spectrum allocations. Naturally, in the interests of customers, all telecoms providers must be able to offer services via the subsidised networks; unfortunately, this is not always the case with commercial rollout today.

2) Proposed act on communication platforms and search engines

Today, very large communication platforms play a central role in public communication and in shaping political opinion. ComCom welcomes the draft bill's objective of strengthening the rights of users of very large platforms and search engines and promoting transparency and trust in digital spaces.

However, ComCom considers it institutionally unsatisfactory that both enforcement and supervision of the law would be concentrated within the Federal Office of Communications (OFCOM). As with the EU's Digital Services Act, on which the new legislation is modelled, an independent supervisory authority would be more robust from a democratic perspective and more future-proof.

ComCom proposes a two-tier model, as also provided for in the Telecommunications Act: OFCOM could carry out operational supervision and investigations, while ComCom, as an independent authority, would impose regulatory measures and sanctions.

3) Revision of the TCA regarding mobile communications

ComCom welcomes the Federal Council's proposal to decouple existing radiation protection requirements – which remains unchanged – from the building permit procedure. Mobile networks are a critical infrastructure, and it is therefore important that the regularly required upgrades of network components are not hindered by unnecessary bureaucratic hurdles and that coverage gaps are avoided.

By clarifying this through specific legislation, the competent cantonal authorities will be relieved of a large volume of unnecessary bureaucratic procedures, and further development of dynamic mobile networks will be simplified.

ComCom also supports the proposal to impose fines for failure to comply with the reporting obligation. To improve transparency, ComCom supports the proposal for network operators to implement a quality assurance system and for OFCOM's antenna database and site data sheets to be made publicly available.

4. INTERNATIONAL RELATIONS

Article 64 of the Telecommunications Act, which came into force in 2021, states that ComCom 'shall carry out the tasks within the scope of its responsibilities at an international level and shall represent Switzerland in the related international organisations'.

Accordingly, ComCom represents Switzerland in meetings of the 'Réseau francophone de la régulation des télécommunications' (FRATEL), the Independent Regulators' Group (IRG) and the European Union's Body of European Regulators for Electronic Communications (BEREC).

At BEREC, ComCom and OFCOM have unfortunately not been able to participate in all activities for several years, as they no longer have observer status. However, OFCOM and ComCom were again authorised, in consultation with the BEREC Chair, to participate in various expert groups and on specific topics in 2025.

At the IRG, which includes the independent regulators of all European countries, ComCom is a founding member and can therefore participate in all events.

5. OUTLOOK FOR 2026

The following activities will form the focus of ComCom's activities in 2026:

1. **Mobile frequencies:** Regarding the reallocation of the mobile frequencies auctioned in 2012, ComCom will set out the specific procedure in 2026 and may also launch the tender process at that time.
2. **Access cases:** In 2026, the focus will be on an exchange of written submissions relating to an appeal before the Federal Supreme Court (FSC).
3. **International affairs:** ComCom and OFCOM will continue to contribute to the Independent Regulators Group (IRG) and to selected working groups under the aegis of the Body of European Regulators for Electronic Communications (BEREC). Alongside OFCOM, ComCom will also take part in events organised by FRATEL and meetings of German-speaking regulatory authorities.

IV. FINANCES

Regulators from various infrastructure sectors report for administrative purposes to the Federal Department of the Environment, Transport, Energy and Communications (DETEC). Since 2012, ComCom has formed part of the Infrastructure Regulatory Authorities (RegInfra) administrative unit alongside the Federal Electricity Commission (ElCom), the Postal Services Commission (PostCom), the Rail Transport Commission (RailCom) and the Independent Complaints Authority for Radio and Television (ICA). DETEC's general secretariat provides services to RegInfra in various administrative areas. In particular, it supports ComCom with regard to budget and accounting. This does not compromise ComCom's abilities to conduct its activities independently.

ComCom collaborates very closely with OFCOM, which prepares most of ComCom's business and instructs it on legal proceedings. Costs incurred by OFCOM for ComCom are also given below to permit an overview of the overall income and expenditure of the telecoms regulator.

OFCOM's costs in connection with its activities for ComCom totalled CHF 3.128 million in 2025. The additional expenditure compared to the previous year is due to preparations for the next mobile frequency allocation. On the revenue side, OFCOM invoiced administrative fees totalling CHF 200,000 in 2025. Administrative fees connected with ongoing legal proceedings and invitations to tender cannot be billed until the decisions or judgments are legally binding.

The expenditure of the Commission and its Secretariat amounted to CHF 1.025 million in 2025 (information on RegInfra is published in the budgets and state financial statements of the federal government; see www.efv.admin.ch).

ABBREVIATIONS

5G = Fifth generation mobile radio

BEREC = Body of European Regulators for Electronic Communications

CATV = Cable television

COMCO = Competition Commission

ComCom = Federal Communications Commission

DETEC = Federal Department of the Environment, Transport, Energy and Communications

DOCSIS = Data Over Cable Service Interface Specification (technology for high bandwidths on coaxial cable)

DSL = Digital Subscriber Line

ESC = Energy supply companies

FAC = Federal Administrative Court

FDD = Frequency Division Duplex (two radio channels are needed for one connection)

FTTB = Fibre to the Building

FTTC = Fibre to the Cabinet

FTTH = Fibre to the Home

FTTS = Fibre to the Street

FWA = Fixed Wireless Access

G.fast = Gigabit fast access to subscriber terminals (technology for bandwidths up to 500 Mbps on copper cable)

HFC = Hybrid Fibre Coaxial

IC = Interconnection

IP = Internet Protocol

IRG = Independent Regulatory Group

ISP = Internet Service Provider

LTE = Long Term Evolution (standard for fourth-generation mobile radio networks/3.9G standard)

LTE-A = LTE-Advanced (standard for fourth-generation mobile radio networks)

MEA = Modern Equivalent Asset

NFC = Near Field Communication

NGA = Next Generation Access Network

OECD = Organisation for Economic Co-operation and Development

OFCOM = Federal Office of Communications

TCA = Telecommunications Act (CC 784.10)

TDD = Time Division Duplex (bidirectional communication on only one radio channel)

TSO = Telecommunications Services Ordinance (CC 784.101.1)

VoIP = Voice over IP

VoLTE = Voice over LTE

WLAN = Wireless Local Area Network

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