



Brussels, 5.5.2026
COM(2026) 180 final

**REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE
COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE
COMMITTEE OF THE REGIONS**

Report on Competition Policy 2025

{SWD(2026) 125 final}

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1. INTRODUCTION

Europe is currently experiencing a period of profound uncertainty, driven by climate change, sudden geopolitical shifts, and the rapid evolution of digital markets. The EU – and in particular its economy – is confronted with major challenges requiring swift reactions from policymakers and lawmakers. EU competition policy exists to ensure our well-being in the EU by protecting us against distortions of competition that harm the public interest. This is a reminder of the breadth of the competition mandate.

President von der Leyen's Political Guidelines¹ set out the Commission's vision for responding to the multiple challenges facing the EU. Central to the Commission's 2025-2029 mandate is the Competitiveness Compass², a framework designed to allow the EU to regain competitiveness and ensure sustainable prosperity. The Clean Industrial Deal (CID)³ implements the Competitiveness Compass. Among other things, the CID focuses on closing the innovation gap⁴, securing vital supply chains, leveraging decarbonisation, and enhancing economic resilience.

From the start of the new Commission, Executive Vice-President Teresa Ribera took charge of the competition portfolio with a mandate focusing on modernisation, simplification, robust enforcement, and ensuring a clean, just and competitive transition. The Directorate-General for Competition (DG Competition) implements this mandate in the competition field. When enforcing the EU competition rules, the Commission continues to make dynamic assessments of consumer welfare to protect competition and the innovative capacity of EU companies, while contributing to EU resilience and meeting the objectives of the green and digital transitions.

Throughout 2025, the Commission undertook substantial work aligned with its mandate. A major step was the adoption of the Clean Industrial Deal State Aid Framework (CISAF)⁵, which ensures swift and targeted support for the clean and green transition while avoiding fragmenting the Single Market. Moreover, the Commission launched a review of the Horizontal and Non-Horizontal Merger Guidelines to provide a comprehensive, predictable, and lasting framework for all types of mergers and all economic sectors reflecting multiple transformational changes in the economy, ranging from digitalisation to globalisation. Concurrently, the Commission continued to vigorously enforce the antitrust rules against abuses of dominant market positions and other anti-competitive practices that stifle effective competition on price, choice, quality, and innovation. In this context, the Commission is finalising its Guidelines on exclusionary abuses under Article 102 TFEU. The Foreign Subsidies Regulation (FSR)⁶ contributed to countering anti-competitive and market-distortive activities by firms active in the EU that receive subsidies from outside the EU. Moreover,

¹ Europe's choice - Political Guidelines for the next European Commission 2024–2029 - Ursula von der Leyen - Candidate for the European Commission President, 18.7.2024.

² Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the European Committee of the Regions - A Competitiveness Compass for the EU, (COM/2025/30 final), 29.1.2025

³ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - The Clean Industrial Deal: A joint roadmap for competitiveness and decarbonisation (COM/2025/85 final), 26.2.2025.

⁴ As compared to other major economies in the world.

⁵ Communication from the Commission - Framework for State Aid measures to support the Clean Industrial Deal (Clean Industrial Deal State Aid Framework (C/20025/3602), 25.6.2025.

⁶ Regulation (EU) 2022/2560 of the European Parliament and of the Council of 14 December 2022 on foreign subsidies distorting the internal market, OJ L 330, 23.12.2022, p. 1.

the Digital Markets Act (DMA)⁷ was enforced to unlock digital competitiveness by addressing unfair behaviour of gatekeepers and ensuring market contestability.

The Commission's competition enforcement in 2025 transformed key EU values into tangible market realities. This work ensured that competition could take place on fair and equal terms, reinforced legal certainty for businesses, and promoted cohesion in the Single Market. It also supported EU competitiveness in strategic sectors, drove sustainable and inclusive growth, and enabled consumers and companies to benefit more from the economic advantages of the Single Market.

The 2025 Report on Competition Policy (ACR) provides a succinct overview of how the Commission has translated political priorities into concrete action⁸. The ACR is accompanied by a Staff Working Document (SWD), which provides a comprehensive account of policy developments, enforcement, and key EU case-law in the competition field. These documents are addressed by the Commission to the European Parliament, the Council of the European Union (the Council), the European Economic and Social Committee (EESC), and the European Committee of the Regions (CoR).

2. A MODERN AND SIMPLIFIED COMPETITION POLICY ENABLES COMPETITIVENESS AND SUSTAINABLE AND INCLUSIVE GROWTH

The 2024-2029 Commission mandate calls for EU policies to shift from reactive regulation to proactive strategic action. To meet this objective and guarantee sustainable prosperity and competitiveness, the Commission aims to ensure that the EU competition rules are modern, streamlined, and aligned with other EU policies so that they contribute more to the clean and digital transition.

In 2025, the Commission continued modernising key competition rules to support broader EU policy goals. Rules have been and are being reviewed and simplified to reduce regulatory burdens and compliance costs, improve guidance, ensure predictability, and increase legal certainty. These efforts aim to incentivising and accelerate critical investments across the EU.

As a world-leading competition enforcer, the Commission must ensure that its competition rules are modern and reflect market changes. This is key for the review agenda of the 2024-2029 Commission. To ensure that the competition framework remains effective, the Commission is reviewing and, where appropriate, revising its regulations, notices, guidelines, and communications. In doing so, the Commission is preserving the fundamental rules that have stood the test of time, while responding to today's complex technological, economic, and geopolitical challenges. To ensure that competition policy contributes to promoting prosperity, innovation and consumer choice, the Commission sought public feedback on multiple files in public consultations in 2025.

⁷ Regulation (EU) 2022/1925 of the European Parliament and of the Council of 14 September 2022 on contestable and fair markets in the digital sector and amending Directives (EU) 2019/1937 and (EU) 2020/1828 (Digital Markets Act), OJ L 265, 12.10.2022, p. 1.

⁸ See also Directorate-General for Competition Infograph '2025 at a glance' of 6.1.2026. This one-page infograph summarises main events during the 'competition policy year 2025' for the Commission. https://competition-policy.ec.europa.eu/document/download/43bc2a9e-7172-4163-bc7c-d4b1afadd150_en?filename=2025_at_a_glance.pdf

Modernising and simplifying State aid rules and guidance.

The adoption of the **Clean Industrial Deal State Aid Framework (CISAF)** was a strategic priority in 2025. CISAF is designed to facilitate the EU's clean transition at the necessary speed and scale with the objective of making the EU a key global player in state-of-the-art clean technologies. The new framework goes further than just simplifying and speeding up support for decarbonisation - it recognises the State as a strategic investor in our net-zero future. CISAF is a tool to drive climate ambitions, strengthen the resilience of the Single Market, and ensure that the EU industry remains globally competitive. The EU achieves this while defending the integrity of the Single Market, avoiding undue distortions to competition, making energy systems more stable, affordable, and fair, while promoting equitable labour market outcomes such as fair wages, decent working conditions, training, and transition to fair jobs.

Clean Industrial Deal State Aid Framework adopted

The framework sets out the conditions under which Member States can grant support for investments and objectives in clean industry in line with EU State aid rules. The rules are intended to accelerate the roll-out of renewable energy, speed up industrial decarbonisation, and stimulate clean tech manufacturing in the EU. These objectives should be fulfilled without undue distortion of competition in the Single Market while safeguarding economic cohesion.

CISAF gives Member States the appropriate tools to accelerate the transition to a net-zero economy by enabling them to notify schemes that the Commission will assess and, if appropriate, authorise. On this basis, Member States can then swiftly grant State aid to individual projects. By the end of 2025, the Commission had adopted eight decisions approving nine national measures notified by five Member States with a total amount of EUR 18.4 billion.

CISAF remains in force until the end of 2030. It complements other State aid instruments, not only the General Block Exemption Regulation (GBER)⁹ but also the Climate, Environmental protection and Energy Aid Guidelines (CEEAG)¹⁰, and the Regional Aid Guidelines (RAG)¹¹.

CISAF simplifies the State aid rules across seven main areas: (i.) roll-out of clean energy and low-carbon fuels; (ii.) temporary electricity price relief for energy-intensive users; (iii.) decarbonisation of existing production facilities; (iv.) development of clean tech manufacturing capacity in the EU; (v.) measures to stimulate demand for clean technology products; (vi.) facilitation of Innovation Fund projects; and (vii.) de-risking of investments related to Clean Industrial Deal objectives.

The Commission encourages Member States to design State aid measures so that resilience objectives are fully addressed and to consider wider social and environmental policy objectives during the implementation of the projects.

To support and accelerate the scaling up of key industries and build strategic autonomy - as required by the Clean Industrial Deal Communication - the Commission launched in April 2025 a **Design Support Hub** in the context of the **Joint European Forum for Important Projects of Common European Interest (JEF-IPCEI)**¹². The Design Support Hub works closely with Member States to streamline and accelerate the development of IPCEI candidate projects from start to finish. At the end of 2025, four IPCEI candidate projects were in development in the Design Support Hub¹³. Since it was launched, the JEF-IPCEI has published 12 recommendations, helping Member States to streamline, simplify and speed up the set-up and the implementation of IPCEIs.

⁹ Commission Regulation (EU) No 651/2014 of 17 June 2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty, OJ L 187 26.6.2014, p. 1.

¹⁰ Communication from the Commission – Guidelines on State aid for climate, environmental protection and energy 2022, C/2022/481, OJ C 80, 18.2.2022, p. 1.

¹¹ Communication from the Commission - Guidelines on regional State aid 2021/C 153/01, OJ C 153, 29.4.2021, p. 1.

¹² https://competition-policy.ec.europa.eu/state-aid/ipcei/design-support-hub_en

¹³ https://competition-policy.ec.europa.eu/state-aid/ipcei/joint-european-forum-ipcei_en

To tackle the housing crisis, new State aid rules for **Services of General Economic Interest (SGEI) concerning affordable housing**¹⁴ were adopted in 2025, directly supporting social objectives for an inclusive and just transition. The new rules facilitate Member States' **support to affordable and energy-efficient housing**. The revised and clearer rules simplify procedures and give more flexibility for Member States to finance support for social and affordable housing initiatives. The revision is a key component of the Commission's European Affordable Housing Plan adopted in December 2025¹⁵.

In a just and inclusive social market economy, all EU citizens should have access to critical medicines. In 2025, the Commission provided **guidance to Member States on how EU State aid rules apply to public support for critical medicines**¹⁶ in the context of the proposed Critical Medicines Act¹⁷. The proposed Act would incentivise EU pharmaceutical companies to diversify their supply chains and boost pharmaceutical manufacturing in the EU. The guidance informs Member States how to apply EU State aid rules to support the supply of critical medicines.

In 2025, the Commission started a major revision of the **General Block Exemption Regulation (GBER)**¹⁸ in line with the Competitiveness Compass and the CID. The GBER is an important simplification tool because it reduces the regulatory burden for Member States and companies and allows aid to be granted expediently without prior Commission approval if specific conditions are met and the distortion of competition in the Single Market is minimal.

An **efficient and sustainable EU transport system** is key for a clean, just and competitive transition, increasing the coherence between essential infrastructure and decarbonisation goals. The Commission's commitment to green logistics and efficient networks is a direct implementation of the CID and the Commission's Sustainable and Smart Mobility Strategy¹⁹. To this end, the Commission continued its work on **the Transport Block Exemption Regulation (TBER) and Guidelines on State aid for land and multimodal transport**. The TBER and Guidelines are intended to encourage a shift from road to rail and incentivising multimodal transport such as combining rail and inland waterways.

The current **Emissions Trading Scheme (ETS) State aid Guidelines**²⁰ allow Member States to give State aid to certain electricity-intensive users to compensate them for a part of high electricity costs. The Guidelines, which apply until 2030, ensure that the Commission's climate goals, and competitive market principles work in concert to drive **decarbonisation**. In 2025, the Commission

¹⁴ https://competition-policy.ec.europa.eu/state-aid/legislation/sgei_en

¹⁵ https://single-market-economy.ec.europa.eu/sectors/proximity-and-social-economy/social-economy-eu/affordable-housing-initiative_en

¹⁶ Guidance on the application of State aid rules in the context of the Critical Medicines Act, 11.3.2025.

¹⁷ Proposal for a Regulation of the European Parliament and of the Council laying a framework for strengthening the availability and security of supply of critical medicinal products as well as the availability of, and accessibility of, medicinal products of common interest, and amending Regulation (EU) 2024/795, COM(2025) 102 final, 11.3.2025.

¹⁸ Commission Regulation (EU) No 651/2014 of 17 June 2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty, OJ L 187, 26.6.2014, p. 1.

¹⁹ Communication from the Commission to the European parliament, the Council, the European economic and social committee and the Committee of the regions sustainable and smart mobility strategy – putting European transport on track for the future, COM/2020/789 final, 9.12.2020. The Sustainable and Smart Mobility Strategy is the Commission's roadmap to transform the EU transport system into a greener, smarter, and more resilient sector, aiming for a 90% reduction in transport emissions by 2050.

²⁰ Communication from the Commission guidelines on certain State aid measures in the context of the system for greenhouse gas emission allowance trading post-2021, C/2020/6400, OJ C 317, 25.9.2020, p. 5.

launched a review²¹ of the ETS State aid Guidelines and adopted, based on the most recent data available, technical updates²² relating, among other things, to CO₂ emission factors, geographic areas and included additional industrial sectors eligible for compensation. The State aid rules contribute to the restructuring and modernisation of EU industries and their production capacities.

Modernising and simplifying the Merger Guidelines

Since its inception, EU merger control has been instrumental in shaping the Single Market, operating as a streamlined ‘one-stop-shop’ that successfully facilitates company expansions, investment, and market predictability across the EU. This framework has ensured effective merger control where approximately 90% of proposed mergers are handled in a simplified manner year on year, promoting economic growth. In 2025, the Commission received 384 merger notifications. 325 decisions were adopted, of which 97% were approved without conditions. Of all decisions, 88% were adopted by simplified procedure. The Commission authorised nine notified mergers subject to commitments. No proposed merger was prohibited in 2025, and no transaction was withdrawn by the notifying parties during the second-phase investigation. To ensure that this robust framework remains an effective tool in a rapidly transforming economy, the Commission launched a **major revision of its Merger Guidelines** in 2025. This essential update covers the Horizontal Merger Guidelines²³ (covering mergers among competitors) and the Non-Horizontal Merger Guidelines²⁴ (covering mergers in the supply chain and closely related markets). This revision is aligned with the Commission’s mandate to enhance global competitiveness and effectively address current and future geopolitical challenges.

The revision reflects transformational market developments that impact competitive dynamics in many markets. These new market realities include rapid digitalisation, the competitive advantages of controlling massive amounts of digital data about customers and competitors, and Artificial Intelligence (AI). Other factors include globalisation and decarbonising the EU economy. The comprehensive review began with a public consultation²⁵. In close collaboration with the EU national competition authorities (NCAs), the Commission identified multiple relevant factors such as innovation, investments, resilience, and global competitive capacity. The revised Guidelines are expected in 2026 and will reflect evolving Commission practice and case-law of the EU courts.

Modernising and simplifying antitrust rules and guidance.

The antitrust rules are equally important when tackling market-distorting conduct in a rapidly changing economy. To ensure that the antitrust rules remain effective in the future, the Commission is currently reviewing its core **antitrust procedural framework** (Regulations 1/2003 and 773/2004). The aim is to improve the effectiveness of the antitrust procedural framework, notably simplify procedures, accelerate investigations, and more generally ensure that the Commission’s enforcement tools fit the fast pace of change in new and evolving markets. In 2025, the Commission

²¹ https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14801-Technical-updates-of-the-Emissions-Trading-Scheme-ETS-State-aid-guidelines_en?G-RB4EH5DG40=

²² Communication from the Commission amending the guidelines on certain State aid measures in the context of the system for greenhouse gas emission allowance trading post-2021, OJ C, C/2026/196, 5.1.2026.

²³ Guidelines on the assessment of horizontal mergers under the Council Regulation on the control of concentrations between undertakings, OJ C 31, 5.2.2004, pp. 5–18.

²⁴ Guidelines on the assessment of non-horizontal mergers under the Council Regulation on the control of concentrations between undertakings, OJ C 265, 18.10.2008, pp. 6–25.

²⁵ https://competition-policy.ec.europa.eu/mergers/review-merger-guidelines_en

launched a call for evidence and a public consultation questionnaire to gather feedback from stakeholders on options for revising the rules. This was complemented by a ‘reality check’ workshop²⁶ in December 2025 to engage further with stakeholders on their perspectives on the various policy options outlined in the call for evidence.

Work continued in 2025 on the new **Article 102 Guidelines on exclusionary abuses**. The Commission is currently revising the draft Guidelines, incorporating the feedback received from a public consultation, a workshop as well as conclusions to be drawn from the EU Court judgments that were issued following the publication of the draft Guidelines in 2024. The Commission aims to adopt the Guidelines in 2026, ensuring that the final text reflects the latest EU court judgments delivered during the drafting process.

The Commission continued its review of the **Technology Transfer Block Exemption Regulation (TTBER) and its accompanying Guidelines** in 2025. The Commission is revising this framework to ensure that companies have clear, simple and up-to-date rules for pro-competitive technology licensing agreements. The revised TTBER framework, expected in 2026, will facilitate technology dissemination, incentivise early-stage R&D&I while simultaneously reducing compliance costs and associated administrative burdens for businesses.

Foreign Subsidies Regulation Guidelines and Review report

The FSR²⁷ seeks to ensure competition on fair and equal terms by **tackling competition-distortive subsidies granted by third countries to companies active in the Single Market**.²⁸

In 2025, the Commission consulted stakeholders on the draft FSR Guidelines. Among other things, the new Guidelines would provide guidance on the determination of a distortion caused by a foreign subsidy and the criteria applied, and the application of the ‘balancing test’ (that is to say weighing positive effects of foreign subsidies against their distortive effects). Moreover, the Guidelines would cover the Commission’s power to call in ‘below notification threshold’ mergers, public tenders, and the criteria considered. The Guidelines would provide clarity on the application of the FSR for companies engaged in concentrations and public procurement procedures in the EU.

The FSR stipulates that the Commission must submit a report to the European Parliament and Council by July 2026. To this end, the Commission carried out a public consultation and call for evidence in 2025²⁹ to assess the implementation and enforcement of the FSR. Feedback was sought on critical operational issues, including the costs the FSR places on businesses, the notification

²⁶ Reality checks are part of the Commission’s simplification toolbox. They help the Commission to understand at technical level the practical experience of companies and practitioners who apply EU law, for example by identifying administrative burdens and regulatory bottlenecks. The knowledge gathered at ‘reality checks’ is used to identify opportunities to simplify and reduce administrative burden.

²⁷ DG Competition is responsible for enforcing the FSR rules on concentrations and to start own-initiative procedures outside public procurement procedures, while DG Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) is responsible for enforcing the FSR in the context of public procurement.

²⁸ The FSR closes a regulatory gap in the Single Market where subsidies granted by Member States are subject to scrutiny under EU State aid rules, while subsidies granted by non-EU governments go largely unchecked. Under the FSR, companies have to notify financial contributions received from non-EU public authorities in the last three years, before implementing a concentration (that is to say a merger, an acquisition, or a joint venture) or the award of a contract in a public procurement procedure in the EU above given notification thresholds. The FSR allows the Commission to conduct own-initiative reviews if information indicates the existence of a foreign subsidy distorting the Single Market.

²⁹ https://ec.europa.eu/eusurvey/runner/FSR_ReviewReport2026

thresholds, the balancing test³⁰, as well as the rules' degree of complexity, and their effectiveness in preventing distortions in the Single Market.

Review report on the Digital Markets Act

The DMA is a Single Market instrument which aims to make the EU digital sector fairer and more contestable³¹. The DMA applies to **large digital platforms designated as 'gatekeepers'**³² and is intended to prevent unfair market practices and increase market contestability. A wide range of obligations apply to designated gatekeepers, notably vertical and horizontal interoperability, prohibited self-preferencing, and giving business users access to critical data accumulated by the digital platforms. The DMA provides EU companies and non-EU firms alike with better opportunities to challenge the gatekeepers. Such challenges boost innovation and ultimately increase consumer choice in the EU (and likely beyond due to regulatory and economic spill-over effects).

To formally assess the DMA's early impact and its capacity to face emerging challenges, such as the transformative rollout of AI-powered services, the Commission carried out a public consultation and call for evidence in 2025. This process sought feedback from interested parties on the DMA's overall effectiveness and implementation and its ability to face emerging challenges such as the rapid and transformative rollout of AI-powered services. Based on the input received, the Commission is preparing its first review report, to be presented to the European Parliament, the Council and the EESC by May 2026.

3. COMPETITION ENFORCEMENT DEFENDS AND FACILITATES COMPETITIVE, FAIR AND WELL-FUNCTIONING MARKETS

Effective enforcement remains vital to safeguard the credibility and integrity of the competition rules. In 2025, robust enforcement across all instruments - State aid, antitrust, merger control, the FSR, and the DMA - upheld the integrity and resilience of the Single Market and in many cases transformed the strategic vision of boosting the clean, just and competitive transition into concrete market reality. Enforcement creates the predictable, transparent, and fair market conditions necessary to make it easier for companies to grow and invest in the Single Market and beyond. This commitment to fairness ensures that the Single Market remains a level playing field, creating new business opportunities and give access to key inputs for all market participants, many of whom rely on the Commission's enforcement to compete successfully. By acting against companies engaging in anti-competitive behaviour that risks fragmenting the Single Market, EU competition enforcement helps alleviate the economic damage when the EU is hit by external economic shocks and geopolitical interference.

The Commission's competition enforcement creates EU added value. When prioritising its enforcement measures and deciding whether to initiate investigations on its own initiative, the

³⁰ When conducting the balancing test, the Commission needs to take into account whether and to what extent the foreign subsidies distorting the internal market under consideration have positive effects on the 'development of the relevant subsidised economic activity on the internal market'. In addition, the Commission also has to 'examine broader positive effects in relation to the relevant policy objectives, in particular those of the Union'.

³¹ More information about the DMA and its enforcement may be found in the DMA Annual Report 2025.

³² Under the DMA, designated 'gatekeepers' are large digital platforms that provide 'core platform services' as listed in the DMA, for example online search engines, app stores, or messaging services.

impact on the Single Market is one of the main criteria. When pursuing high-impact cases, DG Competition uses its scarce resources to maximise the pro-competitive impact of its interventions. The Commission may also pursue certain cases for their precedent-setting value.

State aid control

The Commission's State aid enforcement in 2025 demonstrated how competition policy supports the clean, just and competitive transitions of the EU economy. The cases below illustrate how the Member States have turned their strategic visions into concrete investment projects.

Boosting renewable energy sources: The Commission authorised France under CISAF to invest EUR 11 billion to accelerate the use of renewable energy³³. This 20-year project supports the construction and operation of **three floating offshore wind farms**. The funding is granted following a bidding process and will take the form of a monthly variable premium, showing how the new rules can facilitate targeted public investment at the necessary speed and scale required for sustainable transformation.

Decarbonisation schemes: Several large national schemes were authorised in 2025 to accelerate the shift to a net-zero economy. For example, a EUR 5 billion German scheme was approved to help companies subject to the EU Emission Trading Scheme to **decarbonise their production processes**, requiring a 90% emission reduction goal per project³⁴. Moreover, Finland's EUR 2.3 billion plan was approved under the State aid Temporary Crisis and Transition Framework to support investments in strategic sectors and decarbonising production processes³⁵. In addition, a Dutch EUR 1.2 billion scheme was approved to reduce lifecycle greenhouse gas emissions, with funds granted through a competitive bidding process prioritising the largest environmental benefits for the lowest cost³⁶. The Commission also approved, under CISAF, a Spanish aid scheme for the **decarbonisation of the manufacturing industry**. The scheme supports electrification, shifting to renewable or low-carbon hydrogen, recovery of waste heat, carbon capture, storage and utilisation, in a wide range of sectors. The aid consists of direct grants determined on the basis of pre-defined aid intensities. The scheme is open to companies of all sizes and to installations and sectors within and outside of the Emission Trading System³⁷.

Ensuring sufficient manufacturing capacity in clean technologies: Six national schemes with total budgets of EUR 6.7 billion were authorised under CISAF in 2025, all contributing to the achievement of the 40% resilience benchmark of the Net-Zero Industry Act³⁸. For example, a EUR 4.1 billion Hungarian scheme³⁹ and a EUR 1.5 billion Italian scheme⁴⁰ were approved to incentivise production based on net-zero technology.

³³ Case SA.115764 – EPIP - Régime de soutien à trois parcs éoliens en mer, l'un au large du Sud de la Bretagne et deux autres en Méditerranée, 5.8.2025.

³⁴ Case SA.116065 – Förderprogramm Klimaschutzverträge – Second auction of the Climate Protection Contracts scheme, 24.3.2025.

³⁵ Case SA.114934 – TCTF - Act on Tax Credit for Certain Large Investments Aiming at a Climate Neutral Economy, 18.2.2025.

³⁶ Case SA.103901 – NL_KGG_RGG_VI_Nationale Investeringsmodule Klimaatprojecten Industrie (NIKI), 20.5.2025.

³⁷ Case SA.119880 – Spain - CISAF/RRF - Aid scheme for the decarbonisation of manufacturing industry.

³⁸ Regulation 2024/1735 of the European parliament and of the Council on establishing a framework of measures for strengthening Europe's net-zero technology manufacturing ecosystem and amending Regulation (EU) 2018/1724, 13.6.2024. The Net-Zero Industry Act (NZIA) creates a regulatory framework aimed to boost the competitiveness of EU industry and technologies crucial for decarbonisation. A core target of the NZIA is the 40% resilience benchmark. It mandates that by 2030, EU manufacturing capacity for strategic net-zero technologies should meet at least 40% of the annual deployment needs of the EU.

³⁹ Case SA.120705 – CISAF - Aid to ensure sufficient manufacturing capacity in clean technologies, 17.12.2025.

⁴⁰ Case SA.120488 - Italy - RRF-CISAF - Framework scheme for manufacturing capacity related to clean technologies, 9.12.2025.

Boosting the use of green energy: In 2025, the Commission approved targeted support for developing green energy sources. An Austrian measure of EUR 400 million was approved to support the production of **renewable hydrogen** through the European Hydrogen Bank's 'Auctions-as-a-Service' tool⁴¹. Moreover, a Danish EUR 36 million scheme was authorised to encourage the use of **sustainable aviation fuel** accelerating the decarbonisation of the aviation sector⁴².

Secure supply of energy: In 2025, the Commission approved several State aid measures aiming to ensure that there is sufficient capacity to produce, store or flexibly consume electricity, and that electricity production meets the expected demand. For example, a EUR 300 million Swedish strategic electricity reserve to safeguard security of electricity supply in emergency situations⁴³ and a EUR 750 million Estonian strategic reserve to support security of electricity⁴⁴, were approved. The projects that will benefit from the aid in both measures will be selected through a transparent, non-discriminatory competitive bidding process. In addition, the Commission approved under CEEAG a reform of the market-wide electricity capacity mechanism of France⁴⁵. The redesigned French mechanism will operate for ten years with an estimated budget of EUR 2 billion per year, totalling EUR 20 billion over its duration.

Consolidating nuclear-based energy: In 2025, the Commission approved support for the construction and operation of nuclear power plants, contributing to the decarbonisation of the energy sector and the security of electricity supply. A Belgian support measure for the lifetime **extension of two nuclear reactors**, Doel 4 and Tihange 3⁴⁶, was authorised after an in-depth investigation. In addition, the Commission approved aid measures for the first nuclear power plant in Poland⁴⁷, which will consist of three new nuclear reactors.

The IPCEI Tech4Cure⁴⁸: In 2025, to support breakthrough innovation in the health sector, the Commission approved another IPCEI in the health sector, Tech4Cure. This IPCEI enables five Member States (France, Hungary, Italy, Slovakia and Slovenia) to provide up to EUR 403 million of funding to ten companies, unlocking an additional EUR 826 million in private investments. The Commission's ambition to involve more SMEs in IPCEIs was successful. In Tech4Cure, 60% of participating companies are SMEs. Moreover, it creates a broader IPCEI ecosystem involving associated and indirect partners. Tech4Cure enables cross-border research and innovation and the first industrial deployment of a new generation of medical devices with advanced and novel digital/AI solutions to support the concept of predictive, preventive, and personalised medicine (3P Medicine). This project aims to make healthcare better, faster, and cheaper. In addition, Tech4Cure served as a pilot project for the IPCEI Design Support Hub, which was launched in the spring of 2025.

⁴¹ Case SA.116277 – Austria's Participation in EU Hydrogen Bank Auction, Förderung der Erzeugung von erneuerbarem Wasserstoff nicht biogenen Ursprungs, 10.3.2025.

⁴² Case SA.102731 – Aid Scheme for Sustainable Aviation Fuels (SAF) in Domestic Aviation, 29.7.2025.

⁴³ Case SA.112968 – Sweden – Electricity Strategic Reserve, 29.7.2025.

⁴⁴ Case SA.112459 – Estonia – Electricity Strategic Reserve, 28.10.2025.

⁴⁵ Case SA.117564 – France - Réforme du mécanisme de capacité, 22.12.2025.

⁴⁶ Case SA.106107 – Belgium – Lifetime extension of two nuclear reactors (Doel 4 and Tihange 3).

⁴⁷ Case SA.109707 – Poland – Aid measures for the first nuclear power plant in Poland.

⁴⁸ Cases SA.113212 – France; SA.117899 – Hungary; SA.117859 – Italy; SA.117793 – Slovakia; SA.117849 – Slovenia – Important Project of Common European Interest – Innovative medical devices and support software (IPCEI Tech4Cure).

Antitrust enforcement

The Commission continued in 2025 to pursue several antitrust investigations against companies active in numerous markets, ensuring that these companies do not abuse their market power. Specific attention was placed on digital markets, which possess unique features and present distinct challenges due to prevailing business models and complex market dynamics. For instance, companies may acquire data or technology to heighten barriers to entry or exploit rivals' data for their own benefit, for example in the case of dual function digital platforms or companies acting both as an intermediary and a competitor.

Online display advertising technology services: The Commission adopted the *Google Adtech* decision⁴⁹ in 2025. The case concerns online display advertising technology services and other data-related practices. The Commission imposed a fine of EUR 2.95 billion on Google for abusing its dominant market position by **favouring its own online display advertising technology services** to the detriment of competing providers of advertising technology services, advertisers and online publishers ('self-preferencing'). The Commission ordered Google to cease self-preferencing practices and implement measures which would end the conflicts of interest inherent in the Google Adtech supply chain. Once implemented, companies using Google's Adtech technology will be able to compete and innovate on fair and equal terms, and consumers will have better possibilities to make informed choices.

Digital communication and collaboration tools: In the *Microsoft Teams*⁵⁰ case, the Commission accepted commitments from Microsoft to address competition concerns over **anti-competitive tying** of Microsoft Teams to the Microsoft Office 365 and Microsoft 365 software suites for business customers. Under the commitments, Microsoft has to unbundle Microsoft Teams, that is to say offer versions of these software suites without Microsoft Teams included at a reduced price. Moreover, Microsoft has to allow customers with long-term licenses to switch to software suites without Microsoft Teams. Finally, Microsoft must ensure interoperability with competing communication tools and facilitate the use of competing software solutions. These commitments were essential to restore fair competition and re-open the market for other providers of communication and collaboration tools in the EU.

Break-resistant glass for handheld electronic devices: The Commission made legally binding under EU antitrust rules commitments offered by U.S.-based company *Corning*⁵¹. The commitments resolve the concerns that Corning may have abused its dominant position by concluding **exclusive supply agreements** for Alkali-aluminosilicate glass (Alkali-AS Glass). This break-resistant glass is used for smartphones and other handheld electronic devices. Corning committed to waive all exclusive dealing clauses and no longer impose sourcing requirements on Original Equipment Manufacturers (OEMs) of handheld electronic devices or companies that finish raw glass (finishers). Moreover, Corning will no longer require OEMs or finishers to purchase more than 50% of their respective demand from the company. The commitments will make market access for Corning's competitors easier, thereby securing innovation and resilience in the supply chain for handheld electronic devices.

⁴⁹ Case AT.40670 - Google - Adtech and Data-related practices, 5.9.2025.

⁵⁰ Case AT.40721 - Microsoft Teams – Commitments decision, 12.9.2025; case AT.40873 - Microsoft Teams II – Commitments decision 12.9.2025.

⁵¹ Case AT.40728 – Corning, 18.7.2025.

High-end consumer goods: In 2025, the Commission fined *Gucci*, *Chloé* and *Loewe* - three companies active in the high-end consumer goods sector – a total amount of EUR 157 million for engaging in **resale price maintenance (RPM)** across several Member States.⁵² The three companies restricted the commercial freedom of their independent online and physical retailers to set their own prices. These restrictions covered almost the entire product range sold by the three firms under their respective brand names. Products included apparel, leather goods, shoes, and fashion accessories. This decision reaffirms the Commission’s commitment to tackling anti-competitive RPM practices, ensuring that consumers benefit from genuine price competition.

Incomplete responses to information requests: The Commission fined *Eurofield SAS* and its former parent company, *Unanime Sport SAS*, EUR 172 000 for providing incomplete responses to information requests in the context of an antitrust investigation in the synthetic turf (artificial grass) sector⁵³. If firms under investigation by the Commission do not respect their legal and procedural obligations, the effectiveness of the Commission’s investigation may be jeopardised. It was the first time the Commission fined a company for providing incomplete information in an antitrust investigation. This intervention demonstrates the Commission's increased vigilance and determination to sanction companies under investigation which do not comply with procedural obligations.

Guidance letters and a first opinion: Applying the competition rules is not only about ‘hard’ enforcement, that is to say going after companies that have already broken the competition rules. ‘Soft’ interventions such as issuing guidance letters allow the Commission to give companies *ex ante* legal certainty for their compliance with antitrust rules. The Commission issued two guidance letters⁵⁴ in 2025. The first guidance letter concerns firms active in the automotive sector⁵⁵. The letter provides clarity to companies on the creation of a licensing negotiation group to negotiate licenses for the use of technologies covered by standard essential patents, with the aim of increasing efficiency in the licensing of digital technologies. These technologies are expected to contribute to Europe’s decarbonisation and transition to net-zero goals. This guidance letter supports the competitiveness of EU’s automotive sector and increases consumer choice. The second guidance letter concerns cooperation in the form of joint purchasing and setting of minimum technical specifications for electric container-handling equipment in port terminals⁵⁶, providing additional clarity about a sustainability initiative to facilitate the switch from diesel-powered to battery-powered equipment. Finally, the Commission issued its first opinion under the Common Organisation of the Markets in Agricultural Products Regulation⁵⁷. This opinion concerns wine producers in Occitanie region in France cooperating to produce wine sustainably. The agreement sets orientation prices for six grape varieties sold in bulk wine transactions⁵⁸. The Commission clarified that price coordination among agricultural producers may be compatible with EU antitrust rules, provided that the coordination is strictly necessary to achieve specific sustainability goals.

⁵² Cases AT.40840 – Gucci; AT.40880 – Chloé; and AT.40881 – Loewe, all 14.10.2025.

⁵³ Case AT.40966 – Synthetic Turf (procedure), 8.9.2025.

⁵⁴ Issued under the 2022 Commission Notice on informal guidance relating to novel or unresolved questions concerning Articles 101 and 102 of the Treaty on the Functioning of the European Union that arise in individual cases (guidance letters), OJ C 381, 4.10.2022, p.9.

⁵⁵ https://ec.europa.eu/competition/antitrust/cases1/202536/AT_40979_104.pdf

⁵⁶ https://ec.europa.eu/competition/antitrust/cases1/202536/AT_40976_98.pdf

⁵⁷ First opinion regarding the compatibility of a sustainability agreement with competition rules for the agricultural sector’ based on Article 210a of Regulation (EU) No 1308/2013 establishing a common organisation of markets in agricultural products (‘CMO Regulation’).

⁵⁸ Commission opinion on the request for opinion pursuant to Article 210a(6) of Regulation (EU) No 1308/2013 by Vignerons Coopérateurs de France - Sustainability agreement in the wine sector in Occitanie, 15.7.2025.

The opinion gives wine producers the legal certainty to continue investing in sustainable wine-production practices.

The Commission's 2025 enforcement activities also included **cartels** – considered the most hard-core infringements of competition law. Several decisions sanctioning anti-competitive behaviour with profound impact on the EU economy and with direct and tangible negative effects on consumers are summarised below.

End-of-life vehicle (ELV) recycling: The Commission fined 15 major car manufacturers and the European Automobiles Manufacturers' Association (ACEA) EUR 458 million in total for participating in the *End-of-life vehicle (ELV)*⁵⁹ *recycling cartel*⁶⁰. For over 15 years, the car manufacturers and ACEA agreed not to pay car dismantlers for processing ELVs because they had agreed to consider ELV recycling to be a sufficiently profitable business. The cartel members also shared commercially sensitive information, coordinated their behaviour towards dismantlers, and agreed not to disclose how much of an ELV can be recycled, recovered, and reused and how much recycled material is used in new cars. This intervention by the Commission directly supported the goals of the green transition by protecting the recycling value chain and stimulating the circular economy.

Online food and grocery deliveries: The Commission fined *Delivery Hero* and *Glovo*⁶¹ a total of EUR 329 million for operating a cartel between July 2018 and July 2022. The cartel involved agreeing not to poach each other's employees, exchanging sensitive commercial information, and dividing geographic markets in the European Economic Area. It was the first time the Commission sanctioned a cartel affecting the labour market by restricting competition for talent and reducing opportunities for workers, demonstrating that competition enforcement actively promotes inclusive growth by protecting the free movement and fair wages of workers across the Single Market. It was also the first time the Commission addressed the use of a minority shareholding to coordinate the behaviour of competitors.

Automotive starter batteries: The Commission fined three automotive starter battery manufacturers and the trade association Eurobat a total of EUR 72 million for engaging in a long-running cartel concerning automotive starter batteries⁶². The manufacturers agreed to create and publish premiums calculated based on their purchasing price of lead. They agreed to use these premiums in the price negotiations with their respective OEM customers to ensure that the resulting surcharge was kept at a higher level. The Commission concluded that it is illegal for suppliers to secretly coordinate surcharges to use them as an industry-wide standard.

Furthermore, the Commission carried out **three unannounced inspections** at the premises of companies suspected of breaching the antitrust rules in several industries: vaccines, non-alcoholic drinks, and ski equipment. Making unannounced inspections is one of the most important enforcement tools at the Commission's disposal in the field of competition. Inspections are essential for securing evidence and maintaining the element of surprise is necessary for effective enforcement. They allow the Commission to objectively assess suspicions, ensuring that the competition rules are respected and deter anti-competitive behaviour.

⁵⁹ An End-of-Life Vehicle is a car that is no longer fit for use, either due to age, wear and tear, or damage. These vehicles are dismantled and processed for recycling, recovery, and disposal.

⁶⁰ Case AT.40669 - End-of-life vehicle recycling, 1.4.2025.

⁶¹ Case AT.40795 – Food delivery services, 2.6.2025.

⁶² Case AT.40545 – Automotive starter batteries, 15.12.2025.

Merger control

In 2025, the Commission continued to enforce the merger rules to protect businesses and consumers from price increases, but also from a deterioration of other important parameters of competition such as quality, choice, and innovation in many vital areas of the EU economy. Merger control prevents concentrations that significantly impede effective competition in the internal market, leading to for example excessive market power, market foreclosures, and the elimination of market entrants, thereby supporting the Commission's priorities.

A selection of key cases adopted in 2025 resulting in clearance decisions subject to commitments are summarised below. In addition, two important cases are presented concerning potential breaches of the Merger Regulation.

Software for chips: The Commission conditionally approved *Synopsys*' acquisition of *Ansys*⁶³. The U.S.-based companies have largely complementary activities, but the Commission found that the transaction would have increased market concentration and reduced global competition in the markets for the supply of: (i.) optics software simulating how light behaves in large macro-scale systems (for example screens or car headlights); (ii.) photonics software simulating how light behaves in smaller nano-scale optical systems (for example digital cameras or solar panels); and (iii.) register-transfer-level power consumption analysis software, which is a software tool used at the early stage of the chip design process to measure the power consumption of chips. To address these concerns, the merging parties offered to divest their activities in the problematic markets mentioned above. The structural remedies were essential to prevent the elimination of effective competition and preserve the integrity of the supply chain in these critical, high-technology markets.

Trimmable horizontal stabiliser actuator systems for aerospace: The Commission conditionally approved the acquisition of part of the *Collins Aerospace* actuation business by *Safran USA Inc.*⁶⁴ (controlled by the French company Safran S.A.). The Commission found that the merger significantly reduced competition in the market for trimmable horizontal stabiliser actuator systems (THSA), by combining two main suppliers. To resolve the competitive concerns, Safran offered to divest its entire North American THSA business.

Aerostructures and large commercial aircraft: The Commission approved *Boeing*'s acquisition of *Spirit* subject to conditions⁶⁵. The Commission found that the proposed transaction risked significantly reducing competition in global aerostructures and large commercial aircraft markets. In particular, Boeing could have restricted or worsened Spirit's supply of aerostructures to Airbus and gained access to Airbus's commercially sensitive information. To address these concerns, Boeing committed to divest all Spirit businesses supplying Airbus to Airbus itself. Moreover, Boeing committed to divest Spirit AeroSystems Malaysia to Composites Technology Research Malaysia.

Aluminium packaging containers and lids for wet pet and human food: The Commission approved the acquisition of *Aluflexpack* by *Constantia*, subject to conditions⁶⁶. The Commission found that the proposed transaction would have reduced competition in the market for the supply of sterilisable aluminium containers and lids for wet pet and human food in the EU, leading to

⁶³ Case M.11481- Synopsys / Ansys, 23.5.2025.

⁶⁴ Case M.11253 - Safran / Part of Collins Aerospace's actuation and flight control activities, 17.6.2025.

⁶⁵ Case M.11578 – Boeing / Spirit, 14.10.2025.

⁶⁶ Case M.11536 – Constantia / Aluflexpack, 6.5.2025.

higher prices and less choice for customers. To address the Commission's concerns, Constantia offered to divest the entirety of Aluflexpack's wet pet and human food business in the EEA.

Merger referrals under Article 22 Merger Regulation: The Commission conditionally approved *Brasserie Nationale's* proposed acquisition of *Boissons Heintz*⁶⁷. Luxembourg referred the case to the Commission pursuant to Article 22 Merger Regulation because it lacks a national merger control regime. The original transaction would have combined Luxembourg's two main wholesale distributors of beverages to hotels, restaurants, and cafés in Luxembourg, putting smaller competitors at a disadvantage. To address these concerns, the merging parties committed to divest the majority of Boissons Heintz's beverage distribution activities to a suitable buyer. The remedy package includes an option for the buyer to acquire Boissons Heintz's name, online shop, and exclusive import agreements. In addition, the acquisition of *Downtown* by UMG⁶⁸, was referred to the Commission by Austria and the Netherlands under Article 22 Merger Regulation. The proposed transaction was in second-phase investigation at the end of 2025.

Conditional approval of UniCredit's proposed acquisition of Banco BPM and investigation under Article 21 Merger Regulation into Italy's use of its 'Golden Powers' legislation

The Commission approved UniCredit's proposed acquisition of Banco BPM⁶⁹ subject to commitments. Both banks are based in Italy and provide corporate and retail banking services as well as insurance and asset management services. The proposed acquisition has an EU dimension because UniCredit also had significant operations in Germany and central and eastern Europe. Following a preliminary investigation, the Commission was concerned about the impact on competition in the markets for deposits and loans to retail customers and SMEs in certain local markets in Italy. UniCredit addressed these concerns by committing to divest 209 bank branches in 21 Italian provinces where the combined bank would have had particularly strong market positions.

However, UniCredit subsequently withdrew its takeover offer for Banco BPM on the grounds that it was not able to comply with additional conditions imposed on the potential takeover by the Italian government under its domestic investment screening legislation. The Commission investigated the conditions imposed by the Italian government and in July 2025 adopted a preliminary assessment⁷⁰ which found that these conditions may breach Article 21 of the Merger Regulation as well as EU financial services legislation and the provisions of the Treaty on the Functioning of the European Union regarding the free movement of capital and the role of the European Central Bank under the Single Supervisory Mechanism.

Potential breach of the stand-still obligation: Ensuring that companies respect the *ex ante* nature of the EU merger control regime is central to preserving effective competition within the Single Market. To this end, the Commission issued a Statement of Objections to Vivendi,⁷¹ informing the company of its preliminary view that it had **breached the standstill obligation in Article 7(1) Merger Regulation** - which requires that companies do not implement a merger before it has been approved - and the conditions attached to the *Vivendi/Lagardère* merger clearance decision⁷². The Commission's preliminary assessment is that Vivendi exercised decisive influence over Lagardère's media operations before the acquisition was completed.

Enforcement of the Foreign Subsidies Regulation

In 2025, the Commission continued to rigorously enforce the FSR to protect the EU from competition-distortive subsidies granted by non-EU countries to companies operating in the Single Market. Such distortions can arise with respect to any economic activity, particularly in

⁶⁷ Case M.11485 - Brasserie Nationale / Boissons Heintz, 17.7.2025.

⁶⁸ Case M.11956 - UMG / Downtown, ongoing (second-phase investigation).

⁶⁹ Case M.11830 - Unicredit / Banco BPM, 19.06.2025.

⁷⁰ Case M.12052 - UniCredit / Banco BPM - Article 21(4) - Preliminary assessment, 14.07.2025.

⁷¹ https://ec.europa.eu/commission/presscorner/detail/pl/ip_25_1867

⁷² Case M.10433 - Vivendi / Lagardere, 8.11.2023.

concentrations and public procurement procedures. The FSR is co-enforced by DG Competition and the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW)⁷³. A proactive enforcement of the FSR - including own-initiative investigations - is essential for upholding the EU's global competitiveness.

During the year, the Commission investigated for example the acquisition of *Covestro AG* (a German supplier of high-performance polymers and components) by *Abu Dhabi National Oil Company PJSC* (ADNOC), the national oil company of Abu Dhabi. After an in-depth investigation, ADNOC offered commitments, which the Commission subsequently made legally binding in a commitment decision⁷⁴. These commitments were essential to remedy the distortive effects on the Single Market from the foreign subsidies (an unlimited State guarantee and tax benefits to ADNOC, as well as a committed capital increase by ADNOC into Covestro). These subsidies would have distorted competition both during the acquisition process and during the future market activities of the combined entity. First, ADNOC committed to **remove the unlimited State guarantee**, by adapting its articles of association so that they no longer deviate from ordinary UAE insolvency law. Second, ADNOC committed to **share Covestro's sustainability patents** with those companies that are particularly reliant on Covestro's sustainability technology. The Commission found that the offered commitments would fully and effectively remedy the distortive effects on the Single Market caused by the foreign subsidies. The ADNOC/Covestro decision marks the second final Commission decision under the FSR since it entered into force.

Furthermore, in 2025, the Commission opened an own-initiative in-depth investigation into *Nuctech*⁷⁵, a Chinese-owned company active in the manufacturing and sale of threat detection systems (scanners used for example at airports, in harbours and at borders). The Commission had indications that Nuctech had been granted foreign subsidies, allowing it to offer prices and conditions that could not be matched by other market players. If these competitive concerns are confirmed in the investigation, the Commission may impose redressive measures or accept commitments offered by the company that would address the concerns.

The Commission also carried out one unannounced inspection under the FSR at the premises of a company active in the e-commerce sector⁷⁶ and continued working on its preliminary review in the wind energy sector.

Enforcement of the Digital Markets Act

The DMA ensures that companies of all sizes can compete, enhancing the Single Market's attractiveness and providing new opportunities for both EU and foreign firms⁷⁷. Since the DMA's entry into force, and throughout 2025, its enforcement has resulted in **tangible and practical benefits for both businesses and consumers**. For example, DMA enforcement opened up mobile ecosystems, allowing developers to offer **competing app stores on Apple's iOS and iPadOS**.

⁷³ DG Competition is responsible for enforcing the FSR in the field of mergers. In addition, DG Competition has the power to start own-initiative investigations to tackle distortions on the Single Market caused by foreign subsidies outside public procurement procedures. DG Grow (the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs) is responsible for enforcing the FSR for foreign subsidies public procurement procedures and to start own-initiative investigations to tackle the distortive effects of foreign subsidies in public procurement procedures.

⁷⁴ Case FS.100156 - ADNOC / COVESTRO, 14.11.2025.

⁷⁵ Case FS.100068 – Nuctech, 11.12.2025

⁷⁶ On 10.12.2025, a Commission spokesperson stated that '[we] can confirm that the Commission has carried out an unannounced inspection at the premises of a company active in the e-commerce sector in the EU, under the Foreign Subsidies Regulation.'

⁷⁷ More information how the Commission enforces the DMA is available in the DMA Annual Report 2025. It will be available here: https://digital-markets-act.ec.europa.eu/about-dma/dma-annual-reports_en.

Moreover, **eSIMs**⁷⁸ can now be transferred to and from Android phones and iPhones, **ensuring full interoperability**. Users are also offered a **choice screen** so that they can easily select their preferred default browser on iOS devices.

Regulatory dialogue is a crucial element of the DMA. In 2025, the Commission held regulatory dialogues with every company designated as a gatekeeper. This type of exchange is an effective way to **prevent problems before they occur, build trust** between the parties involved, and encourage **early compliance** with the DMA. Regulatory dialogues allow the Commission to guide gatekeepers' behaviour almost in 'real time', rather than only relying on *ex post* competition enforcement. In 2025 the Commission also organised six **technical compliance workshops**⁷⁹, which allowed interested stakeholders to discuss proposed compliance solutions with the Commission and the gatekeepers themselves.

The Commission adopted its first decisions following specification proceedings⁸⁰. Such specification decisions provide specific compliance guidance to the designated gatekeepers. The Commission's **specification decisions** specified what Apple must do to ensure **effective and seamless interoperability** between iOS, iPadOS and competing operating systems. Apple has appealed both specification decisions⁸¹.

Furthermore, the Commission concluded **three non-compliance investigations** in 2025⁸². After constructive regulatory dialogue, the Commission closed its investigation into Apple's **user-choice architecture**⁸³ when the company agreed to change its browser choice screen, making it easier for users to set a new default browser on their iPhones.

In a separate case, the Commission found that Apple's **anti-steering practices** breached the DMA and imposed a EUR 500 million fine⁸⁴. The Commission also **imposed a cease-and-desist order** obliging Apple to remove all technical and commercial steering restrictions within 60 days. The decision was appealed by Apple⁸⁵. The company subsequently revised its contractual terms for app distribution on iOS.

Furthermore, the Commission found that Meta's '**consent or pay**' **advertising model** breached the DMA and imposed a EUR 200 million fine⁸⁶ and imposed a cease-and-desist order requiring Meta to make the model compliant within 60 days. The decision was appealed by Meta⁸⁷. Following dialogue with Meta, the Commission took note of Meta's proposed commitment to offer users in

⁷⁸ An eSIM is a digital, embedded SIM card that functions like a physical card but is built directly into the device. This eliminates the need to insert a physical card, allowing for quicker activation and easier switching between mobile telephony payment plans.

⁷⁹ https://digital-markets-act.ec.europa.eu/events/workshops_en

⁸⁰ Specification decisions are taken following specification proceedings. In this procedure, the Commission and a designated gatekeeper engage in a formalised regulatory dialogue to allow the Commission to identify concrete measures that the gatekeeper should take to comply with an obligation laid down in Articles 6 or 7 of DMA. Case DMA.100203 – Article 6(7) – Apple – iOS – SP – Features for Connected Physical Devices, 19.3.2025; Case DMA.100204 – Article 6(7) – Apple iOS and iPadOS – SP - Process, 19.3.2025.

⁸¹ Case T-354/25 - Apple and Apple Distribution International v Commission, 6.10.2025 and Case T-359/25 - Apple and Apple Distribution International v Commission, 6.10.2025.

⁸² A non-compliance decision concludes, following an investigation, that a gatekeeper has been non-compliant with a DMA obligation. The non-compliance decision orders the gatekeepers to cease and desist the infringement. In a non-compliance decision, the Commission may impose fines. Case DMA.100055 – Meta – Article 5(2), 23.4.2025; Case DMA.100109 – Apple - Online Intermediation Services - app stores - AppStore - Art. 5(4), 23.4.2025; CASE DMA. 100185 – Apple - Operating systems - iOS - Art. 6(3), 23.4.2025.

⁸³ Case DMA.100185 – Apple – Operating systems – iOS – Article 6(3), 23.4.2025.

⁸⁴ Case DMA.100109 – Apple - Online Intermediation Services - app stores - AppStore - Art. 5(4), 23.4.2025.

⁸⁵ Case T-438/25 Apple v Commission, 7.7.2025.

⁸⁶ Case DMA.100055 – Meta – Article 5(2), 23.4.2025.

⁸⁷ Case T-435/25 Meta Platforms v Commission, 4.7.2025.

the EU an alternative, free version of its social networks using fewer personal data and less targeted advertising.

The Commission, moreover, launched proceedings into a potential breach of the DMA by *Google* by **demoting media publishers' content in search results**⁸⁸. The Commission's investigation focuses specifically on Google's 'site reputation abuse policy' determining if its application complies with DMA obligations.

The Commission also opened three market investigations into **cloud computing services** in the course of 2025. Two market investigations assess whether *Amazon* and *Microsoft* should be designated as gatekeepers for their cloud computing services, Amazon Web Services and Microsoft Azure⁸⁹. The third market investigation examines if the DMA obligations effectively tackle practices that may limit competitiveness and fairness in the EU cloud computing sector⁹⁰.

No new gatekeeper designations were made in 2025. However, the Commission concluded that *Meta*'s online intermediation service **Facebook Marketplace should no longer be designated as a gatekeeper** under the DMA⁹¹. The changes made by Meta to Facebook Marketplace reduced the number of business users so that Facebook Marketplace no longer fulfilled the DMA designation thresholds.

4. BENEFITS OF COMPETITION ENFORCEMENT FOR CONSUMERS AND CITIZENS

The Commission's enforcement in the fields of antitrust and mergers generate direct benefits for citizens. DG Competition measures the impact of its enforcement in the areas of antitrust (cartels and non-cartel antitrust) and merger control in several ways.

An important measure is 'direct customer savings', that is to say likely direct price effects for customers in markets where the Commission has intervened. Based on a simplified OECD method, DG Competition estimates that direct customer savings generated by the Commission's antitrust (cartels and non-cartel antitrust) and merger enforcement in 2025 amounted to a sum in the range of EUR 12.4 - 21.9 billion. In relative terms, competition enforcement saved each household in the EU around EUR 60 - 100 per year in the period 2012-2025.

The Commission is not the only enforcer of the EU competition rules. Its partners in the European Competition Network (ECN) also play an active role. In 2025, DG Competition and participating NCAs within the ECN continued to work on measuring additional customer savings generated by enforcement action taken by these NCAs. For the period 2020-2024, the analysis indicates that the combined customer savings sum up to a range of EUR 18 - 30 billion per year. This means that the NCAs contribute at least another 50% of direct savings on top of those generated by the Commission. The total amount of direct customer savings corresponds to some EUR 100 - 160 per household per year for this period.

Competition policy enforcement does not only have a positive economic impact at microeconomic level. It also serves as an important driver of welfare and growth at macroeconomic level. Estimated price reductions resulting from competition policy interventions (both directly and indirectly, via deterrence effects) can be used to improve economy-wide performance indicators on investment,

⁸⁸ Case DMA.100231 – Alphabet – Google Search – Site reputation abuse policy, 12.11.2025.

⁸⁹ Cases DMA.100032 – Microsoft – cloud computing services and DMA.100033 – Amazon – cloud computing services, 18.11.2025.

⁹⁰ Case DMA.100236 – Cloud – Article 19, 18.11.2025.

⁹¹ Case DMA.100044 – Meta – online intermediation services – marketplace, 23.4.2025.

employment, prices, productivity and ultimately on gross domestic product (GDP)⁹².

5. COMPETITION POLICY IN A EUROPEAN AND GLOBAL CONTEXT

Cooperation in the European Competition Network

Cooperation in the ECN contributes to a consistent and effective enforcement of EU antitrust rules, ensures enforcement cohesion and promotes a common competition culture in the EU.

The Commission and the EU NCAs apply EU antitrust rules (Articles 101 and 102 TFEU) in parallel. In the ECN, they coordinate enforcement activities and cooperate to ensure that these rules are **applied in an effective and consistent manner across all Member States** and promote a common EU competition culture. To this end, NCAs have an obligation to: (i.) inform the Commission about a new investigation at the stage of the first formal investigative measure; and (ii.) notify the Commission their envisaged national decisions applying EU antitrust rules.

In 2025, the Commission and the NCAs launched 154 new investigations and the NCAs notified 71 envisaged decisions to the Commission. The Commission and the NCAs hold regular meetings in multiple working groups to discuss and exchange views on new and ongoing investigations, case-law developments, and various other competition policy-related issues. In 2025, 37 ECN meetings took place.

International relations – reaching out to partners across the globe

The Commission's international activities in the competition field are important for creating a more competitive and assertive EU, as the EU faces multiple geopolitical challenges that risk fragmenting the world politically and economically. Among other things, international cooperation in the competition field is built on trust, knowledge sharing, and exchange of best practices. Coordinated competition enforcement across jurisdictions is more important today than ever. The fact that the EU is widely recognised as a world-leading competition policymaker and enforcer allows it to **leverage its partnerships to defend a rules-based international order**.

In 2025, the Commission deepened its engagement with **multilateral organisations**, continued to invest in **bilateral relationships** through cooperation and **trade agreements** (notably with the United Kingdom, Canada, Japan, and China), as well as through its cooperation activities with African countries to foster coordination of competition law and its enforcement. The Commission also continued its engagement with **candidate countries** (and the potential candidate) seeking membership in the EU.

Multilateral organisations: The Commission engaged with international forums such as the Competition Committee of the Organisation for Economic Cooperation and Development (OECD), the OECD Global Forum on Competition, the International Competition Network (ICN), and the United Nations Conference on Trade and Development (UNCTAD). This work focused on increasing global convergence on key enforcement challenges, for example those arising from rapid digitalisation, the impact of AI, and the green transition highlight of its activities in the OECD was Executive Vice-President Ribera's keynote speech⁹³ at the OECD Global Forum on Competition,

⁹² Economic literature shows that competition enforcement – alongside other procompetitive market policies (single market policy, trade policy) – contributes to higher productivity and economic growth. For references, see for example OECD (2014), *Factsheet on competition and macro-economic outcomes*. https://www.oecd.org/content/dam/oecd/en/publications/reports/2014/10/factsheet-on-competition-and-macro-economic-outcomes_24994985/660b93ab-en.pdf

⁹³ https://ec.europa.eu/commission/presscorner/detail/en/speech_25_2869

where the Commission was also one of the lead examiners in the OECD Peer Review of Kenya's competition framework⁹⁴. In the ICN, one of the Commission's main achievements in 2025 was finishing its co-chairmanship of the ICN Merger Working Group by delivering updated chapters on unilateral and coordinated effects for the ICN Recommended Practices for Merger Analysis⁹⁵.

Free Trade Agreements: The Commission aims to include strong provisions on competition policy and subsidy control when negotiating free trade agreements (FTAs). In 2025, FTA negotiations were concluded with Indonesia and continued with India, Malaysia, the Philippines, Thailand, and an association of five Eastern and Southern African countries, the so-called ESA-5⁹⁶. Moreover, the Commission started FTA negotiations with the United Arab Emirates, which include a chapter on competition policy.

Competition Cooperation Agreements and other arrangements: In 2025, the Commission continued its bilateral cooperation in the competition field with the UK as foreseen in the EU/UK Trade and Cooperation Agreement (TCA)⁹⁷ and the Withdrawal Agreement⁹⁸. DG Competition's contribution to the EU/UK negotiations focused on the control, monitoring and reporting of potentially competition-distorting subsidy schemes in the UK, as well as on competition legislation and its enforcement. Importantly, the Commission adopted proposals for Council decisions to conclude the EU/UK Competition Cooperation Agreement⁹⁹. Moreover, the Commission continued the negotiations for an EU/Canada competition cooperation agreement, intended to replace the current agreement of 1999¹⁰⁰. The Commission also continued its cooperation with the Korea Fair Trade Commission, the Japan Fair Trade Commission, and China's State Administration for Market Regulation, under their respective cooperation agreements and other arrangements¹⁰¹.

Regional cooperation in Sub-Saharan Africa: In 2025, the Commission cooperated with several African national and regional authorities, such as the West African Economic and Monetary Union (WAEMU), the East African Community (EAC), and the Common Market for Eastern and Southern Africa (COMESA). The core objective is to strengthen their policy frameworks – including competition rules – and to support continental and regional economic integration in

⁹⁴ <https://www.oecd.org/en/events/2025/12/global-forum-on-competition-2025.html>

⁹⁵ <https://www.internationalcompetitionnetwork.org/portfolio/recommended-practices-for-merger-analysis/>

⁹⁶ The five Eastern and Southern African (ESA-5) countries are Comoros, Madagascar, Mauritius, Seychelles, and Zimbabwe. Since 2012, these countries have an interim Economic Partnership Agreement (IEPA) with the EU. Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part, OJ L 111, 24.4.2012, p. 1.

⁹⁷ Trade and Cooperation Agreement between the European Union and the European Atomic Energy Community, of the one part, and the United Kingdom of Great Britain and Northern Ireland, of the other part, OJ L 149, 30.4.2021, p.10.

⁹⁸ Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community, OJ C 384I, 12.11.2019, p. 1.

⁹⁹ Proposal for a Council Decision on the signing, on behalf of the European Union, of the Agreement between the European Union and the United Kingdom of Great Britain and Northern Ireland regarding cooperation on the application of their competition laws, COM/2025/232 final, and Proposal for a Council Decision on the conclusion, on behalf of the European Union, of the Agreement between the European Union and the United Kingdom of Great Britain and Northern Ireland regarding cooperation on the application of their competition laws, COM/2025/233 final.

¹⁰⁰ Agreement between the European Communities and the Government of Canada regarding the application of their competition laws, Official Journal L 175, 10 July 1999, p. 50.

¹⁰¹ Agreement between the European Community and the Government of the Republic of Korea concerning cooperation on anti-competitive activities, OJ L 202, 4.8.2009, p. 36; Agreement between the European Community and the Government of Japan concerning cooperation on anti-competitive activities - Agreed minute, OJ L 183, 22.7.2003, p. 12; Terms of Reference of the EU-China Competition Policy Dialogue between on the one side the Directorate-General for Competition of the European Commission and on the other side the State Administration for Market Regulation of the People's Republic of China, [44fa06fb-3f63-46cb-90c0-b7ff542b3043_en](https://ec.europa.eu/competition/external_dialogue/eu_china_dialogue_terms_of_reference.pdf); Memorandum of Understanding on a dialogue in the area of the State aid control regime and the Fair Competition Review System between the Directorate-General for Competition of the European Commission and the National Development and Reform Commission of the People's Republic of China, [73c7a2da-5a4f-4476-a455-7d63a73ee802_en](https://ec.europa.eu/competition/external_dialogue/eu_china_dialogue_mou.pdf).

Africa and the implementation of the African Continental Free Trade Area (AfCFTA), providing stability and market access for EU and African countries.

Enlargement: For the candidate countries¹⁰² and potential candidate¹⁰³, the Commission's main competition-policy objective is supporting the setting up of legislative frameworks and creating well-functioning and operationally independent competition and State aid authorities. This ensures that these countries can build up solid enforcement records, aligning them with the EU Single Market framework. In 2025, the Commission continued to monitor reforms, enforcement, and overall compliance of the candidate countries and the potential candidate in line with the Commission's 2025 Communication on EU Enlargement Policy¹⁰⁴.

6. SUPPORTING COMPETITION POLICY WITH COMMUNICATION AND ADVOCACY

The Commission's communication and advocacy activities in the competition field fulfil important objectives - to promote a competition culture within the EU and beyond and increase the visibility and transparency of EU competition activities to reinforce their deterrent effect and increase awareness among consumers and citizens how competition enforcement benefits them. The purpose and benefits of competition law and enforcement need to be communicated and visualised effectively to different target groups. The Commission uses multiple communication channels with differentiated messaging to achieve this.

In social media, DG Competition significantly increased its reach and number of followers in 2025. DG Competition is mainly active on YouTube, X and LinkedIn. Among other things, DG Competition focused on the development of its YouTube channel. The channel hosts videos of senior managers speaking at conferences as well as the 'COMP Flash' series where DG Competition officials explain high-profile cases in short videos. DG Competition issued more than 130 press releases in 2025. Finally, the DG Competition website attracted over 12 million views.

Events with the greatest impact were those where Executive Vice-President Ribera participated. Key political dialogues such as the implementation dialogues on IPCEIs and Affordable Housing allowed Executive Vice-President Ribera and the Commission to gather input and receive feedback critical for the effective implementation of competition policy in areas central to the priorities of the Commission.

The Director General of DG Competition participated in many international events in 2025. Moreover, DG Competition organised or co-organised five reality checks to gather technical input from stakeholders¹⁰⁵.

7. RELATIONS WITH OTHER EU INSTITUTIONS

An effective competition policy relies on a continuous and constructive engagement with the Council, the European Parliament, the EESC, and the CoR. This engagement ensures that the Commission's activities in the competition field also reflect broader EU objectives. Moreover,

¹⁰² Countries granted candidate country status by the European Council on the basis of a recommendation by the European Commission: Albania, Bosnia and Herzegovina, Georgia, Moldova, Montenegro, North Macedonia, Serbia, Türkiye and Ukraine.

¹⁰³ Potential candidate for EU membership: Kosovo.

¹⁰⁴ https://enlargement.ec.europa.eu/2025-communication-eu-enlargement-policy_en. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions 2025 Communication on EU enlargement policy, COM/2025/690 final, 4.11.2025.

¹⁰⁵ Reality Check topics in 2025 were Social/Affordable Housing; Trade Defence Instruments and Foreign Subsidies; (co-organised by DG Trade, DG Competition and DG Grow); the TTBER and guidelines; Private enforcement of State aid rules, and the Revision of Reg. 1/2003.

these dialogues allow Executive Vice-President Ribera to steer the competition portfolio in a direction that contributes to sustainable and inclusive growth and overall competitiveness.

In line with President von der Leyen's Political Guidelines and the Faster and Simpler Europe Communication¹⁰⁶, each College member submits an **Annual Progress Report on Implementation, Simplification and Enforcement**¹⁰⁷ to the Council, the European Parliament, the EESC, and the CoR. The objective of this exercise is to ensure accountability and transparency in the implementation and simplification of EU law, a process that is central to the von der Leyen Commission's commitment to a 'simpler and faster Europe'. The aim is to create shared ownership among the EU institutions to improve the effectiveness of EU rules, reduce regulatory burdens, and boost EU competitiveness.

Executive Vice-President Ribera's Report on Implementation, Simplification and Enforcement covers the first seven months of 2025. The Report illustrates the priority that the Executive Vice-President attaches to the Commission's implementation and simplification agenda. It describes the efforts made to revise and simplify existing legislation and to make new legislation more simple and easier to implement. The Report gives examples of finalised or ongoing simplification and implementation efforts, including CISAF, the GBER for State aid, the updated SGEI Decision for affordable housing¹⁰⁸, the Horizontal Merger Guidelines, the Non-horizontal Merger Guidelines, Regulation 1/2003, the FSR, and the DMA.

In 2025, Executive Vice-President Ribera regularly participated in exchanges of views and structured dialogues in both the European Parliament and the Council. In the European Parliament, she appeared before the Economic and Monetary Affairs Committee (ECON Committee); the Committee on Industry, Research and Energy; the Internal Market and Consumer Protection Committee; the Committee on Employment and Social Affairs; the Committee on Environment, Climate and Food Safety, and the Special Committee on the Housing Crisis. In addition, she discussed her 2025 Annual Progress Report on Implementation, Simplification and Enforcement in a structured dialogue with the ECON committee. In the Council, Executive Vice-President Ribera participated in a policy debate on industry competitiveness.

Finally, in 2025 DG Competition staff participated in meetings convened by the rapporteur responsible for drafting the EESC's Opinion on the Commission's Report on Competition policy 2024. This interaction on a 'technical' level provided the rapporteur and his drafting team with contextual information and factual explanations. This exchange of views also deepened the Commission's understanding of the perspectives on competition policy of employers, employees, civil society, and other stakeholders.

¹⁰⁶ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - A simpler and faster Europe: communication on implementation and simplification, com/2025/47 final, 11.02.2025.

¹⁰⁷ https://commission.europa.eu/document/download/ba6e04fd-27f5-4723-93d4-747fa4f0a425_en?filename=RIBERA_APR_SPI_2025_45_EN.pdf

¹⁰⁸ Commission decision of 16.12.2025 on the application of Article 106(2) of the Treaty on the Functioning of the European Union to State aid in the form of public service compensation granted to certain undertakings entrusted with the operation of services of general economic interest and repealing Decision 2012/21/E.