

Co-opetition in the 5G ecosystem

Investments

Standards

Regulation

Public Policy

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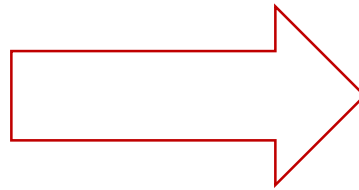
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A complex job

		Vertical integration	
		yes	no
<u>Infrastructural competition</u>	yes	LOI infrastructure based competition	WO model of upstream competition
	not	Service competition	"Upstream Natural monopoly"

Where are we?

- Harmonization
- Assignments
- Pilot, Trials
- 4.5 and new services
- New devices



- Horizontal framework
- 'mobile' Arpu
- 'mobile' infrastructure
- Video as killer app



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Mistakes & Delays

- As the good old days, just a mobile approach
- Fight for on standards
- Horizontal/vertical boundaries uncertainties
- Rivalry vs cooperation in enhancing total (social and societal) value
- 4.5 and local optimization
- Uncertainty over big data sharing and use

Where should we go?

- New horizontal/vertical digital ecosystem
- Spectrum and Infrastructure Sharing
- Club use
- Open Standardization
- Interoperability
- Cybersecurity



5G Co-opetition

Co-opetition

- Defining boundaries for competition and cooperation
 - SEP FRAND
 - Spectrum & Infrastructure sharing
 - Horizontal/vertical standard and use
- Enhancing ex-ante definition
- Avoiding ex-post litigation (opportunism, hold up)

Co-opetition & Regulation

- Light Regulation
 - SEP FRAND
 - Spectrum & Infrastructure sharing
 - Horizontal/vertical standard and use
 - Best practices on 5G, B2B, B2C
 - Pro-competitive cybersecurity rules
 - Ne(x)t neutrality
 - A 5G Agenda setting on services and outcomes

Public Policy

- Administrative burdens
- Re-investing partially 5g Auctions income
- Funding local projects aimed at reducing digital divide
- Supporting and enhancing users' demand

Thanks.

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