

Very High Capacity and 5G Networks: from the EU code to the EU market

24 June 2019, 13:00 – 17:30
CEPS, 1 Place du Congrès, 1000 Brussels

Since telecoms markets liberalisation, competition enhancement and promotion of innovative investments have been the two main objectives of the EU regulatory framework. They have been seen either as completely synergic or, increasingly often, as somehow conflicting and a source of regulatory trade-offs. In this context, the regulatory and policy balance between competition and investment has indeed changed over time: from the ladder of investments (LoI) approach, through the NGA networks (2010) and cost accounting directives (2014), and now to the EU Electronic Communications Code (EECC), which comprises a number of new provisions aimed directly at facilitating the deployment and take-up of very high capacity (VHC) fixed and mobile networks.

The **first session** of this workshop, jointly organized by DeepIn Research Network and CEPS will debate the new EECC provisions to accelerate VHCN investments, trying to shed some light on some crucial questions related to different aspects:

- Definitions, e.g., what is a very high capacity network, i.e., can FWA be included in the scope?
- Effectiveness, e.g., what are the real incentives that these provisions give to (different kinds of) operators? Is regulation weakening an effective and efficient incentive? How will these new provisions interact with national broadband and ultra-broadband public policies?
- Efficiency and fairness, e.g., what impact will these provisions have on competition? On the different kinds of competition (upstream vs downstream)? And on final consumers?

The **second session** will focus on 5G as a building block of the forthcoming digital society, driving a significant market and industrial transformation. Within this forward-looking and yet not completely defined context, policy makers and regulators are seeking to deliver measures to encourage long-term investments in 5G networks. On the other side, market players are trying to understand how to shape their business and investment strategies in order to respond to these transformations. These policy and industrial objectives are related to many different aspects, among which:

- Regulatory provisions: e.g., how and to what extent do the new provisions within EECC help in smoothing the path to 5G deployment?
- Spectrum policy: is there a general best-practice for spectrum licensing? And, specifically for small cells? What authorization model would be better for 5G deployment in mmWave bands?
- Direct public intervention: how and to what extent can public financing fill investment gaps?
- Industry value chains: what will be the actual role of new players (and/or alliances) in the different 5G business models? What (vertical industries, or OTT) will be these new players? How will these changes affect profitability and investment strategies?

AGENDA

12.15 – 13.00 Registration and Lunch

13:00 Welcome and Introduction

Andrea Renda

Head of Global Governance, Regulation, Innovation and the Digital Economy, CEPS

Stefano da Empoli

President, I-COM

13:15 First Session:

Investments for Very high Capacity Networks

Chair: **Antonio Manganelli**, Scientific coordinator, DEEP-IN Research Network

The new EECC provisions to facilitate VHCNs investment

Carlota Reyners Fontana

Head of Unit, Investment in High-Capacity Networks, DG CNETC - European Commission

Annegret Groebel

Head of International Office, BNETZA

Panel: What is the new balance between investments and competition?

Harald Gruber

Head of Digital Infrastructure Division, European Investment Bank

Francesco Nonno

Head of Regulatory Affairs, Open Fiber

Maarit Palovirta

Director of Regulatory Affairs, ETNO

Tiziana Talevi

Head of Regulation, Fastweb

Questions & Answers

15.15 – 15.35 Refreshment

**15:35 Second Session:
5G spectrum and infrastructures**

Chair: **Lorenzo Pupillo**, Associate Senior Research Fellow, CEPS

Spectrum and Infrastructure Policy for 5G

Peter Stuckmann

Head of Unit, Future Connectivity Systems, DG CNET – European Commission

Antonio Nicita

Commissioner, AGCOM / Professor of Economic Policy, University of Rome “La Sapienza”

Panel: What impact will 5G have on business models and investment strategies?

Luigi Ardito

Senior Director, Government Affairs, Qualcomm

Caterina Bortolini

Head of International and European Institutional Affairs, TIM

Ralf Nigge

Head of EU Regulatory Policy, Deutsche Telekom

Johannes Theiss

Senior Advisor, Group International Policy, Vodafone

Questions & Answers

17.30 Closing remarks and greetings