

# New Code, new challenges for the Gigabit society

## Implementing the Code, setting the agenda

Conference, 15. – 16. October 2019

NH Brussels EU Berlaymont, Boulevard Charlemagne 11-19, 1000 Brussels, Belgium

### Programme

#### 1<sup>st</sup> day: 15 October 2019

09:00 – 09:30 Welcome Coffee

#### 09:30 – 10:00 **INVESTING IN THE GIGABIT SOCIETY**

*In this opening presentation we hear from the European Commission about key initiatives to support investment in Gigabit networks over the coming years including planned funding for connectivity to schools and hospitals, 5G corridors and high performance computing facilities to boost Europe's big data capabilities.*

Chair *Iris Henseler-Unger, WIK*

**Anthony Whelan**, Director, Electronic Communications, European Commission

#### 10:00 – 11:00 **IMPLEMENTING THE CODE: BEREC'S GUIDELINES**

*The new European Electronic Communications Code is due to be applied from 2020. Jeremy Godfrey, Chair of BEREC will provide an overview of the activities that BEREC is currently conducting to provide Guidance on the application of the Code including the interpretation of Very High Capacity Networks, as well as the implementation of provisions on symmetric regulation and co-investment*

Chair *Iris Henseler-Unger & Ilsa Godlovitch, WIK*

**KEYNOTE** **Jeremy Godfrey**, Chair of BEREC, Comreg

11:00 – 11:30 Coffee Break

#### 11:30 – 13:00 **GIGABIT NETWORKS: DECIPHERING THE CODE**

*In this session, we debate key issues surrounding the deployment and regulation of high capacity broadband networks with a focus on implications for regulation of wholesale only models, co-investment, utility deployments and the implications of separation by incumbent operators. We will begin by exploring practical examples of different fibre deployment business models by incumbents and alternative investors. We will continue with an in-depth discussion on the implications of these business models for regulation under the EU electronic communications Code and broadband Cost Reduction Directive, as well as highlighting relevant issues for the review of the Commission's Recommendation on Relevant Markets.*

Chair *Karl-Heinz Neumann, WIK*

**Tiziana Talevi**, Director Regulatory Affairs, Fastweb  
**Emmanuel Gabla**, Commissioner, ARCEP  
**Ilsa Godlovitch**, Director, Brussels office, WIK-Consult

13:00 – 14:00 Lunch

#### 14:00 – 15:30 **5G DEPLOYMENT AND COMPETITIVE DYNAMICS**

*In this session, we look at 5G developments in Europe including progress with trials, auctions and deployment, and discuss potential models for network sharing and spectrum pooling in a 5G environment. We also explore potential implications of 5G network slicing for net neutrality, and for future MVNO business models and roaming. We conclude with a discussion on the implications of 5G for the regulatory oversight of mobile markets by Governments, NRAs and competition authorities.*

Chair *Iris Henseler-Unger, WIK*

**KEYNOTE** **Wilhelm Eschweiler**, Vice-President BNetzA

**Jean-Luc Lemmens**, Director, Media and Telecoms, IDATE tbc

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**Bengt Molleryd**, Senior analyst, PTS

**Pieter Nooren**, Senior scientist, TNO

15:30 – 16:00 *Coffee Break*

16:00 – 17:00

### THE FUTURE OF VOICE AND REGULATORY IMPLICATIONS

*The EU electronic communications Code introduces a Euro-rate for fixed and mobile termination as well as a cap on intra-EU international calls. At the same time the nature of personal communications and underlying technologies are evolving, with an increased role for OTT services, and the development of rich "managed" services via RCS. We look into developments and challenges associated with the new regulatory provisions applying to calls, as well as the implications of all-IP for fixed and mobile interconnection and termination. Finally, we reflect on what communications markets might look like in the years to come, and what implications this may have for regulation.*

*Chair* *Philippe Defraigne, Cullen International*

**Tony Shortall**, Director, Telage

**Rene Arnold**, Head of Department, markets and perspectives, WIK

17:00 – 18:00

### GOING GOING GONE - COPPER AND PSTN SWITCH-OFF

*In this session, we look at the practical challenges of moving from legacy PSTN switches and copper infrastructure to modern IP-based services, fibre and alternative technologies, with the aid of presentations from Jersey Telecom, one of the first incumbent operators in Europe to move to full fibre, and benchmarking analysis conducted by WIK.*

*Chair* *Philippe Defraigne, Cullen International*

**Daragh McDermott**, Director Corporate Affairs Jersey Telecom

**Ilsa Godlovitch**, Director, Brussels office, WIK-Consult

18:00

*Closing remarks*

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09:00 – 09:30 Welcome Coffee

09.30 – 10.45

#### NEW SERVICES AND NEW ACTORS IN A DIGITISED EUROPE

*Future communications involve a wide range of applications to a wide range of devices, potentially supplied by many different types of actors over fixed and wireless connections. In this session, we look towards the new dynamics of telecommunication markets and services in Europe and explore the regulatory implications for the incoming Commission and European Parliament. Wolter Lemstra will explore the topic “Leadership with 5G in Europe”. We will also hear from leading entrepreneurs in the fields of connected mobility, the Internet of Things and smart cities.*

Chair

Scott Marcus, Bruegel

**Wolter Lemstra**, Associate Professor, Nyenrode Business Universiteit

**Per-Olof Gustafsson**, Senior advisor, Stokab

**Jacques Bonifay**, CEO, Transatel

10:45 – 11:10 Coffee Break

11:10 – 12:30

#### COMPETITION POLICY FOR TELECOMS AND TECHNOLOGY: LOCAL CONSUMERS, REGIONAL CHAMPIONS AND GLOBAL GIANTS

*In this closing session, we debate the role of competition policy in telecoms and digital industries in light of pressures for consolidation and network sharing in the telecoms field, and the need to tackle perceived new bottlenecks in digital platforms.*

Moderator

Matthew Newman, MLex

KEYNOTE

**Prof. William Kovacic**, Global Competition Professor of Law and Policy, George Washington University

KEYNOTE

**Guillaume Lorient**, Director for anti-trust, mergers and state aid in digital telecoms and media, European Commission

KEYNOTE

**Wolfgang Kopf**, Senior Vice President for Group Public and Regulatory Affairs, Deutsche Telekom

12:30

Closing remarks