1 Corporate Profile
30 Years of Independent Research

- Independent research and consulting
- Focus on regulation of telecommunications, postal services, digitisation and smart energy
- Over 30 years of experience
- 35 scientists, mainly economists
- Large network of partners
- Global success with a clear focus on Europe
Our Focus: Competition, Investment and Innovation

- Regulation
- Competition

- Net Economy
- Infrastructure

- Communications
- Postal Services
- Logistics
- Smart Energy

- Digitisation
- Internet

- Intelligent
- Networks
Our International Footprint
2 Structure and Organisation
Corporate Structure

Federal Ministry for Economic Affairs and Energy (BMWi)

100%

WIK
Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste GmbH

Research-oriented

100%

WIK-Consult GmbH

Consulting

Robert Kneschke – fotolia.com
Boards

Supervisory Board
Chairman: Dr. Daniela Brönstrup, BMWi

Economic Advisory Board
Chairman: Martin Witt

Scientific Advisory Board
Chairman: Prof. Dr. Bernd Holznagel

General Manager
Dr. Iris Henseler-Unger
Organisation Chart

Brussels Office
I. Godlovitch (Director)

Management
Dr I. Henseler-Unger (General Manager and Director)
A. Dieke (Director)
Dr Plückebaum (Director)
Dr Sörries (Director)

Administration
K.-H. Strüver

Cluster Regulation
Regulation and Competition
Dr Sörries
Networks and Costs
Dr Plückebaum
Postal Services and Logistics
A. Dieke

Cluster Digitisation and Internet
Communications and Innovation
M. Lundborg
Markets and Perspectives
Dr Arnold
Business and Strategy
Dr Wernick

Robert Kneschke – fotolia.com
3 Competencies
Cluster Regulation
Focus: Regulation and Competition

- Support of National Regulatory Authorities in the review of electronic communications markets susceptible to ex ante regulation
- Implementation of regulatory measures (reference offers, non-discrimination, cost accounting and accounting separation, price control)
- International benchmarking and best practice analysis for regulatory parameters, competition intensity and market performance
- Effectiveness of sector-specific consumer protection rules
- Transformation of energy system: Smart Grids, Smart Metering, communication technologies for Smart Grids, new business models
- Design of auction mechanisms for frequencies and licences
- Support in reforming spectrum policy (spectrum trading, administrative frequency pricing, liberalisation of spectrum usage)
- Support of firms in merger procedures in the electronic communications sector
- Extensive training and workshops in all topics mentioned above
Development and implementation of analytical cost models. These can be used to calculate the long-run incremental costs of post and telecommunications networks as a basis of regulatory decision making (price regulation and assessment of the proof of costs delivered by the operators). Analytical cost models for:

- The subscriber access network
- The core network
- Mobile networks
- The broadband network
- Colocation services
- NGN backbone

Consulting services on interconnection services (PSTN, VoIP (LRIC+, pure LRIC), Bitstream (L2, L3)).

Consulting services on unbundled network access

Analyses of cost structures and telecommunications networks

Cost studies of network services

Costs of NGN and NGA
Schematic view of modelling process

- **Network Planning & Cost Module**
  - Structural parameters
  - Network structure & hierarchy
  - Coverage & traffic
  - Model input
  - Dimensioning of network elements
  - Model output
  - Prices of equipment and facilities
  - Annuity factors
  - Capital expenditure (CAPEX) for equipment and facilities
  - Annualised CAPEX
  - Operating expenditure (OPEX)
  - Operating costs factors
  - Intensity of use factors
  - Mark-up for common organisational-level costs
  - Cost per network element
  - TSLRIC+ of service

Focus: Networks and Costs (2)

Contact
Dr Thomas Plückebaum
Head of Department
Focus: Postal Services and Logistics

Consulting, Workshops, Reports, Studies

Regulation
- Universal service
- Price regulation & access
- Cost models & analysis
- International letters & parcels

International policy
- EU postal policy
- Digital Single Market
- International & UPU issues

Market analysis
- International benchmarking
- Competition analysis
- Demand studies & forecasting
- Working conditions

E-commerce
- Parcels & e-fulfilment
- Logistics
- IT security

Leading consultant to European Commission and postal regulators in Europe

Contact
Alex Dieke
Head of Department
Cluster Digitisation and Internet
Analyses with respect to the diffusion and adoption of new applications and services of the telecommunications and media industry

Accompanying research and market analyses on digital transformation processes in small and medium enterprises

Analyses of the market structure and market potential especially focusing on IT security, Smart Home and e/m-commerce

Benchmarking and country studies

Forecasts focusing on telecommunications network infrastructure as well as the development of the demand for services

Technology assessment with respect to the impacts of ICT on the information society

SWOT analyses in the field of innovation and research

Empirical social surveys in the telecommunications sector
Within the department “Markets and Perspectives” WIK-Consult is pooling its strengths in the areas of market research, demand analysis, tariffing/pricing as well as ICT-based applications in a cross-industry way. Next to the ICT sector, further network-based industries are supported by this department’s services, too.

- Primary and secondary data analysis/market research.
- Methods of experimental economics.
- The outcome supports our clients on a substantiated basis in internal and external reporting, strategy development and decision-making procedures.
WIK’s "Business and Strategy" department applies an interdisciplinary approach in order to develop strategies for political decision-makers, regulators and market participants in a changing and dynamic market environment.

Our areas of activity include

- Analysis of incentive structures and business models for the market-driven broadband roll-out
- Evaluation of regulatory and funding-related measures that are aiming to strengthen the incentives for the deployment of future-proven gigabit networks
- Examination of the impact of digitisation on retail, business, and wholesale markets in fixed and mobile networks
- Consultancy services on strategic questions in the context of digitisation, regulatory economics and regulatory management in the telecommunications industry and other sectors
Focus: EU Policy and Regulation

- Support to the European Commission, European Parliament and NRAs on regulatory strategy, frameworks and implementation
- Recent studies include
  - Support to the EC on the Impact Assessment of the EU Framework for e-communications
  - Regulatory, in particular access, regimes for network investment in Europe (for EC)
  - OTT players: Market dynamics and policy challenges (for EP)
  - Competition and Investment (for Ofcom)
- Impact assessment and evaluation of ICT policies
- Cost benefit analysis
- Scenarios and forecasts
- Data analysis and econometrics
- International benchmarking and case studies
- Multi-disciplinary approach
4 Projects
Projects

Current Projects and Conferences (1)

- Energy and Smart Integration: Digitalisation of the Energy Transition, 15 November 2016
- Evaluation, scientifical monitoring and transfer of results of the research program Mittelstand-Digital (Strategies for Digital Transformation of Business Processes), accompanying research, German Federal Ministry for Economic Affairs and Energy (2016-ongoing)
- Critical success factors for fibre network roll-out (BREKO, 2016)
- Market and usage analysis of high bit rate telecommunications services for SME in Germany (BMWi, 2016)
- Index of Digitisation and Smart Networks in Germany (BMWi, 2016)
- Substantive issues for review in the areas of market entry, management of scarce resources and general end-user issues (European Commission, 2015-2016)
### Current Projects and Conferences (2)

- Review of the Projected Costs within Royal Mail’s Business Plan (Ofcom, 2015-2016)
- Comparative market analysis of the profits of European postal companies (Federal network Agency, 2015)
- Studies on the links between competition and investment in the fixed and mobile sectors in selected European and non-European countries (Ofcom, 2015)
- Access and interoperability standards for the promotion of the internal market for electronic communications (European Commission, 2015)
- The value of network neutrality to European consumers (BEREC, 2015)
- Market organisation and market reality of M2M-communication regarding smart industry and the allocation of IPv6 numbers (Federal Network Agency, 2015)
- The Interface of Smart Grid and Smart Market (Federal Network Agency, 2013)
- Main Developments in the European Postal Sector 2010-2013 (European Commission, 2012-2013)
- Implications of a nationwide fibre roll-out and its subsidy requirements (Federal Network Agency, 2011)
5 Our Clients
### Governments and Regulatory Authorities

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<th>Governments (selected)</th>
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## Associations and International Organisations

### Associations (selected)
- BIEK
- BITKOM
- BREKO
- bvdp
- Citizens Advice
- DVTM
- Cable Europe
- Deutscher Kabelverband
- ECTA
- PMeV
- VATM
- vz bv

### International Organisations (selected)
- CRASA
- European Commission
- European Parliament
- GCC
- ITU
- World Bank
Clients

Companies

*(selected)*

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