



Transforming the Future, Releasing Digital Innovation!

BEREC Virtual workshop on mobile infrastructure sharing

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Some considerations and market trends 1/3

- Impact of ECB monetary policy: pension funds looking for long term investment opportunities hence high demand for telecom infrastructure. Triple 'L' :Long term, Low risk, Low return. This impacts the telecom markets structure.
- Operators need cash for FTTH and 5G, hence they sell network parts and engage more in infrastructure sharing.
- Infrastructure sharing increases the return on capital employed (proves the illness of Art 76 of the EECC).
- New MNO entrants (e.g. Italy, Germany, Portugal etc.) and impact EECC (e.g. art 47 & 52). Network rollout takes time, hence accompanying measures are necessary. E.g. National Roaming.

Some considerations and market trends 2/3

- Network slicing and 5G wholesale markets:
 - ❑ Some persisting problems exist with 4G.
 - ❑ BEREC should examine the functioning of wholesale markets.

- Impact of (un)Fair distribution of spectrum in all bands? e.g. below 1Ghz.

- Impact of the electromagnetic fields (EMF) standards (power density limits)?

- Increasing role of software.

- Beyond the FTTH and 5G synergies: Cloud and AI.

Some considerations and market trends 3/3

- 2020 – 2030 the B2B decade?
 - ❑ 5G a B2B – Industry 4.0 story.
 - ❑ High time to improve competition! The B2B markets remains everywhere highly concentrated.
 - ❑ 5G private networks: Interoperability with Public networks?
 - ❑ MNO business cases further disconnected from customer locations, hence need for targeted ubiquitous coverage e.g. Connected and autonomous vehicles (trucks).
 - ❑ 5G is use case based technology and less coverage based.

- IoT pan European services. Persisting competition problems in some countries e.g. Germany.

- Non-discriminatory access to shared networks and co-investment agreements, RAN sharing etc. e.g. We have seen agreements between number 1 and number 2 excluding the others. E.g. Belgium.

Evolution of the Common Position

- NRAs need to keep the flexibility to take into account the national circumstance. Hence the CP should remain general and provide broad principles.
- Accountability of NRAs must be improved as some persistent problems exist without (appropriate) action from the concerned NRAs.
- **ecta** response to BEREC PC on Mobile Infrastructure Sharing January 2019: Main points remain relevant:
 - ❑ The need for case-by-case assessment implies that any discussion of benefits and drawbacks must occur against the specific details of a concrete infrastructure sharing agreement. Hence the need to recognise the non-exhaustive nature and a clearer emphasis on the need for context-specific assessment.
 - ❑ The rules of the EECC prevail over those of the CRD (e.g. dispute resolution).
 - ❑ As infrastructure sharing becomes increasingly important in the 5G context, **ecta** believes that application of the CP should be closely monitored and lessons from it be fed into a timely update of the document. To the extent that economic considerations make sharing arrangements justifiably more pressing for operators, competent authorities should keep in focus their welfare implications, recognising that competitors' ability to innovate must not be unduly limited.



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