



Mobile Infrastructure Sharing

BEREC Workshop, 16/11/20



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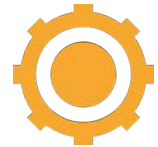


Last Update: August 2020



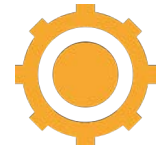
Where Are We Today

- ❖ Network sharing agreements have become **widespread in Europe** as a means to decrease costs, increase coverage, reduce timing of network roll-out, deploy efficiently and rapidly new technologies, boost energy efficiency and reduce the perception of environmental impact of antennas.
- ❖ Majority of infrastructure sharing agreements in Europe are based on commercial agreements. **Sharing decisions are the responsibility of the operators** with an exception of few cases foreseen in the regulatory framework.
- ❖ Ex-ante conditions on the sharing of mobile infrastructure should be avoided as the **commercial agreements between the parties and ex-post anti-trust legislation are sufficient** and prevent undue market distortions.



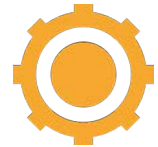
Changing Landscape: Impact of 5G

- ❖ 5G will substantially **change the overall network configuration and management** through virtualization technologies.
- ❖ In 5G environment, the **access network ecosystem will be even more competitive** as more technologies come into play (partnerships and OTT IP-based services).
- ❖ As a consequence, **network sharing models may become more complex** and the need and rationale for sharing could increase, be it passive or active form.



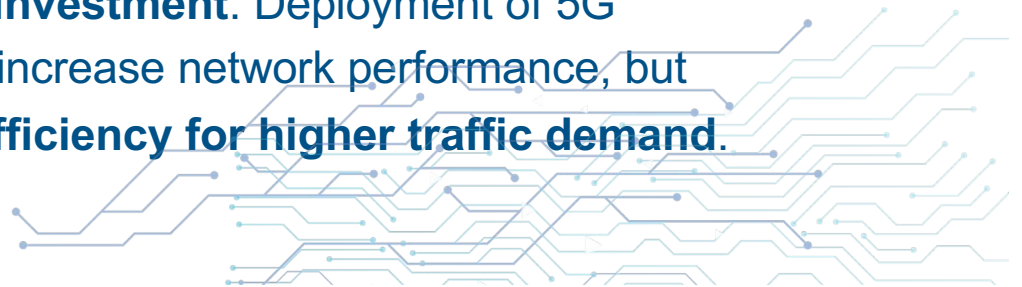
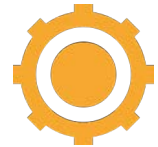
Different Types of Network Sharing

- ❖ **Active sharing:** RAN sharing is becoming more common. **RAN sharing does not imply competitive risks**, as it does not affect the differentiation of technological features or service parameters, which nowadays are determined by the core network, service platform or cloud level.
- ❖ **Spectrum sharing:** Many **new technology advances have granted operators the ability to differentiate even when spectrum is shared** meaning that alleged competition issues as a consequence of active sharing can be reasonably addressed. In parallel, spectrum sharing is very important in rural areas where regulators impose minimum throughput.



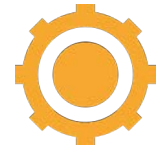
Assessing Network Sharing Agreements

- ❖ Assessment network sharing agreements require **evidence-based analysis on a case-by-case basis**.
- ❖ Parameters used should not only include competition, but also **network coverage, spectrum use, costs reduction, sustainability goals** (reduction of ecological footprint and energy consumption) etc.
- ❖ Similarly, assessment of impact should take into account a variety of aspects that play a role e.g. topology, existing network grids, access to antenna sites.
- ❖ Network sharing agreements are proving essential to support the **sustainability of mobile network investment**. Deployment of 5G technology, is designed not only to increase network performance, but also to deliver **increased energy efficiency for higher traffic demand**.



Recommendations for Next Steps

- ❖ BEREC should update its 2019 Common Position to accommodate the latest market and technology developments with focus on:
 - Equal assessment of the overall objectives
 - Technical developments
 - Analysis of benefits and drawbacks
 - Parameters of assessment of network sharing agreements
- ❖ More dialogue is necessary between competition and regulatory authorities on network sharing arrangements to provide legal certainty.





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