



“Policies and Regulation in the Digital Age: The New Wave”

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- 1. Trends, Developments, Challenges**
- 2. Addressing the Challenges: BEREC's Mission and Strategic Pillars**
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Technology, market and end-user developments

Growth of OTT services, convergence, QoS, NGA investments, market changes, consolidation, bundles...

EU regulatory developments

Impact of new EP, Commission on the future regulatory landscape



Digital Single Market (DSM) Strategy based on 3 pillars:

I. Better access for consumers and businesses to digital goods & services

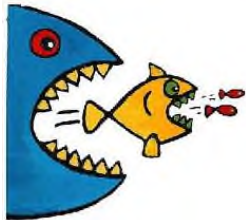
- Geoblocking
- Copyright
- E-commerce
- Parcel delivery
- Reducing VAT burden

II. Creating the right conditions for digital networks & services

- **Telecoms market**
- Media services
- Platforms and intermediaries
- Trust and security

III. Maximizing the growth potential of the digital economy

- Data economy
- Inclusive digital economy and society
- Interoperability and standardisation



High speed changing world

Traditional business models are no longer valid.

Market borders are eroding.

New Digital Ecosystem

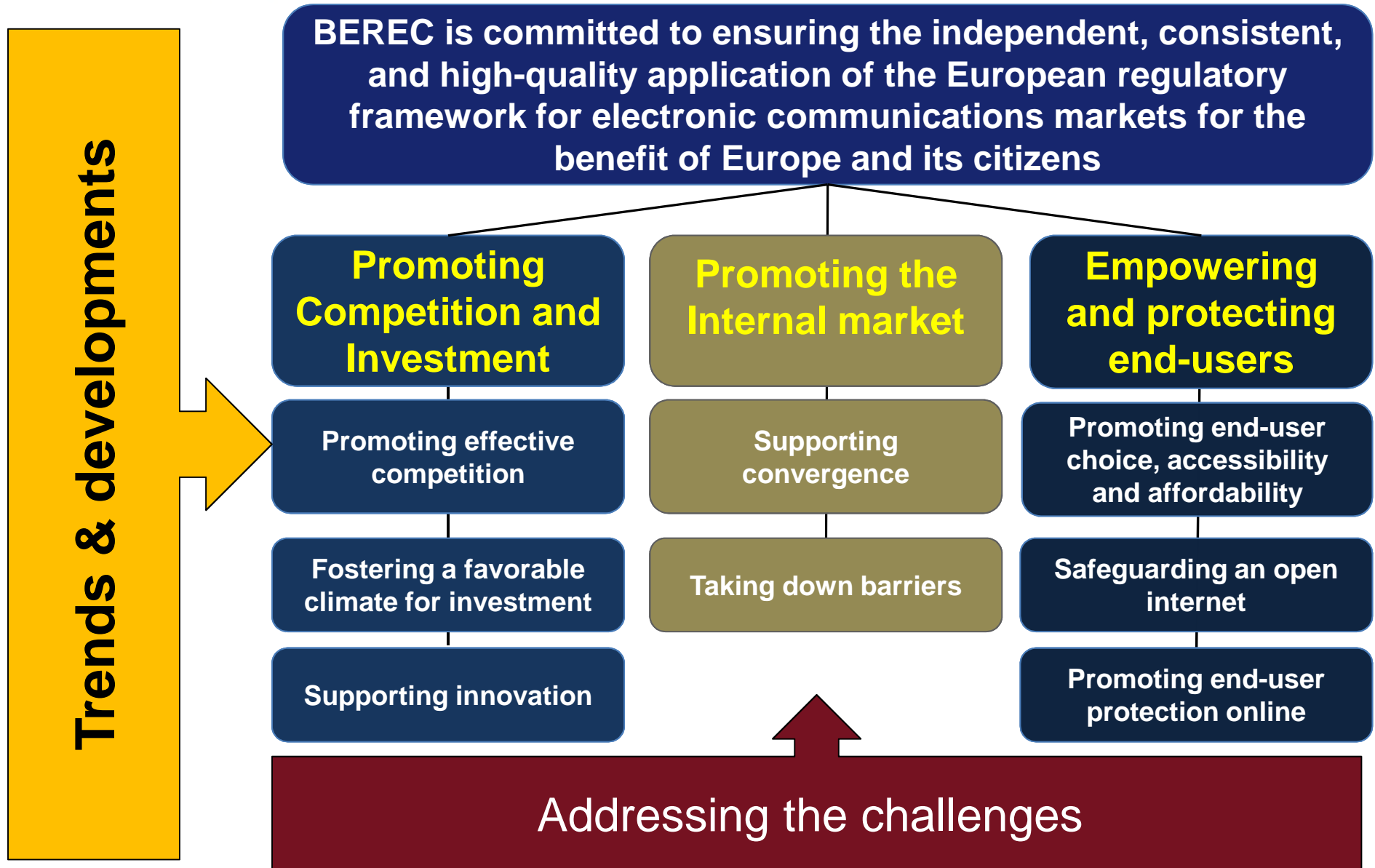
As regulators we have to look ahead.

Make a forecast about our role in the future.

Within BEREC we are working to find the most efficient, proportionate and least intrusive regulatory approaches.

- **Connectivity: Is there a connectivity issue around Europe?**
- **Universal Service: Does the current scope of the USO need to be updated?**
- **End-Users' Protection: General and/or specific consumer protection legislation for telecoms? Is specific consumer protection additionally needed?**
- **OTTs: Is there a distortion of the “level playing field” among different players? Are ECS and OTT services competing? What are the relevant markets?**

BEREC's Mission and Strategic Pillars



Through effective, predictable, and consistent regulation of national wholesale (broadband) markets

- Promoting effective competition requires attention to convergence and consolidation ensure information transparency and ease of switching for end-users
- Fostering a favorable climate for efficient investment in high-speed networks ensuring that market players can operate in an undistorted market as competition is the best driver of investment
- Supporting innovation ensuring a smooth transition from PSTN to all IP-technology by taking a pro-competitive, technologically neutral and forward-looking approach that supports the development of new business models, while protecting the interests of end-users



The Nation



Increasing end-user access to services independently from location, device or platform

■ Supporting convergence



- Support development of IP network technologies
- Address fixed/mobile convergence

■ Taking down barriers



- Within its sphere of competence: e.g. common approach to net neutrality, harmonized consumer protection framework, EU approach to international mobile roaming, facilitating the provision of pan-European services, cross-border issues
- Outside its sphere of competence: cooperate with other relevant bodies (RSPG, ENISA,...)

Pillar 3: Empowering and protecting end-users

- Promoting end-user choice, accessibility and affordability

- Ensure end-users are equipped to make informed choices about the increasingly complex products emerging in a convergent environment
- Ensure ease of switching to enable end-users to access offers that meet their needs



- Safeguarding an open internet

- Dealing with issues of Net Neutrality
- Attention to new end-user needs emerging from growing range of new internet applications and services including OTT services
- QoS becomes increasingly important aspect of end-user protection



- Promoting end-user protection online

- Seeking cooperation with other relevant bodies to improve end-users' trust around data privacy protection, internet security and content regulation



"What-If" Meetings

- **Connectivity, investment and competition**
- **Services, consumers' rights and Universal Service**
- **Governance (BEREC institutional design)**

Workshop & Follow-up

- **On the foreseen review of the 2009 regulatory framework**
 - **Regulatory consistency and predictability**
 - **Boosting connectivity**
 - **The role of spectrum in terms of connectivity goals**
 - **Level playing field between ECS and substitutes**
 - **Universal Service**
 - **Regulatory changes to exploit the full potential of digital services (non-ECS substitutes)**

Opinion to EC

- **Request for a formal opinion received on 22 July 2015.**
- **Evaluation of the existing framework (REFIT)**
- **BEREC's opinion to be finished beginning of December.**

Stakeholders Forum

- **October 15th 2015, Brussels.**

- **Improve connectivity/accelerate investments/stimulate competition**
- **Evaluation regulatory framework and assessment if/where adjustment pro-competitive regulatory approach necessary**
- **Promote competition as best driver for investment**
- **Key principles:**
 - ✓ **Regulatory predictability**
 - ✓ **Regulatory consistency**
 - ✓ **Regulatory flexibility**
- **Cooperation among NRAs and with EC within BEREC supported by BEREC Office**

BEREC

All BEREC documents are published on the BEREC website:

<http://berec.europa.eu>

Thank you

