

BEREC
Market and Economic Analysis Working Group
Workshop

Competition dynamics of tower and access infrastructure companies

Date: 20 June 2023
Time: 10:00 – 14:30 CEST

Towercos and fibre netcos have become an increasingly important part of the telecoms landscape in many European countries. In this workshop, which is conducted in connection with a study by WIK-Consult for BEREC, we will explore how and why infrastructure companies have been formed, the structure of the companies and their access offers, and the implications for competition and investment in fixed and mobile very high capacity networks. We will conclude with a discussion around the implications of the rise of infrastructure companies for regulation under the EU Electronic Communications Code, BCRD and forthcoming Gigabit Infrastructure Act.

10:00 – 10:10 Introduction from BEREC and the WIK project team

The workshop will open with an introduction from BEREC and a brief overview from WIK-Consult about the aims of the workshop, the objectives of the study, timetable and stakeholder engagement plans.

10:10 – 11:20 Session 1: The rise of the towercos - Trends in mobile infrastructure outsourcing

Long a feature of the US market, towercos are playing an increasing role in the EU with the expansion of independent tower companies, and asset divestments by major mobile network operators. In this session we hear from towercos and telcos about what is motivating the drive towards outsourcing and the opportunities and challenges this creates for towercos and their customers / sometime shareholders. Has the drive towards outsourcing been effective in boosting efficiency and supporting deployment of key infrastructure? What have been the implications for competition?

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| <i>Chair Christian Hocepiéd</i> | <i>University of Namur</i> |
| Jaume Pujol Huguet | Cellnex |
| Ralf Capito | Vantage Towers |
| Fabio Ruffini | INWIT |
| Marc Schütze | 1&1 |
| Oliver Füg | Telefonica |

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11:20 – 12:30 Session 2: Fibre netcos, business models and implications

A growing number of telecom operators are hiving or spinning off their fibre assets in order to take advantage of the opportunities for increased asset valuations, new capital and in some cases State Aid. In addition, long term investors and municipalities are continuing to deploy fibre based on wholesale only models across Europe. In this session we look at how these business models are developing and the implications for competition and investment.

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| <i>Chair Ilsa Godlovitch</i> | <i>WIK-Consult</i> |
| Lionel Recorbet | CEO, XpFibre |
| Iciar Martínez Nuñez | Onivia |
| Wojciech Rosiak | Iliad |
| Manuel Braga-Monteiro | Vodafone |

12:30 – 13:10 Lunch break

13:10 – 14:25 Session 3: Perspectives of regulators and competition authorities, implications for future regulatory practice

In this session we hear from regulatory and competition authorities about how they have responded to the creation of towercos and netcos, and discuss the implications of these developments for the proposed Gigabit Infrastructure Act as well as for the ongoing implementation of the EECC and BCRD.

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| <i>Chair Ilsa Godlovitch</i> | <i>WIK-Consult</i> |
| Luigi di Gaetano | AGCOM, Italian Competition Authority |
| Brian Potterill | Ofcom, UK telecoms regulatory authority |

14:30 Concluding remarks and closure of the workshop