BoR (25) 126

Summary of the BEREC external workshop on the competitive effects of strategic fibre networks deployment, including in the context of copper switch-off

2 October 2025

Contents

1. Introduction

On June 26, 2025, BEREC conducted an external workshop on the topic of the competitive effects of strategic fibre networks deployment, including in the context of copper switch-off. This workshop was preceded by an internal one on the same topic which was held on June 25, 2025.

The main focus of the workshop was on capturing the interactions between operators investing in fibre rollout, the impact of these interactions on the competition dynamics, and, if competition was impeded, the regulatory response that the operators see fit to counteract the dysfunctionalities identified.

The concept of “strategic deployment of fibre” is central to this discussion. For the purpose of this workshop, BEREC approached it from two main perspectives - on the one hand, as a risk that is taken into account in the investment decision by factoring in the possibility of another operator deploying in the same area and reducing the expected returns (the higher the risk of being overbuilt, the higher the probability of reassessing the investment priorities) and, on the other hand, as an anticompetitive conduct meant to prevent other operators from deploying in a given area. Regarding the cases, Orange’s experience is the main illustration of the first perspective, while other operators also explained their drivers in deployment. The cases in Germany, Italy and Austria focus at least partially onto the second perspective. Naturally, each case is significantly shaped by the status of network rollouts in the country of discussion, the incident regulations and the specifics determined by geography, population density and propensity to invest.

The workshop was well attended, with over 131 participants (both physically and remotely) representing over 35 nationalities (25 NRAs) and the BEREC Office.

The external workshop was structured as follows: in the morning session, the introductory speech was held by BIPT president, followed by an overview of the activity and the agenda done by the co-Chairs, as well as the presentations of the perspective of the incumbent operator (Orange) in France, stakeholders in Germany, and of an alternative operator (Open Fiber) in Italy. In the afternoon session, there were presentations of the perspectives of stakeholders in Austria, roundtable discussions and concluding remarks.

2. Workshop proceedings

2.1. The French case

Orange presented its experience with over 15 years of fibre deployment in France. They explained how three phases may be identified in its deployment of FTTH:

- 2007/2010: Orange deployed its first FTTH networks in very dense areas with infrastructure-based competition. Orange, in particular, highlighted the turning point when the French legislator created the principle of network sharing in 2008 and ARCEP laid out the regulatory framework on that basis as of 2009. Hence, any operator deploying an FTTH

network must provide passive access to its network to other operators, under transparent and non-discriminatory conditions;

- 2010/2018: Orange explained how ARCEP completed its framework for less dense areas which created legal certainty for the other 4/5 of the households (the first decision in 2009 concerned very dense areas). Orange insisted on the obligation of completeness, whereby any fibre network operator (FNO) who starts to roll out a network in a certain area has to connect all premises in the covered area within a reasonable timeframe of 2 to 5 years. This made it possible to avoid coverage gaps and overbuild.
  In parallel, the French government launched a call for expressions of interest to invest in FTTH networks in 2011 for less dense areas, to identify areas which would be covered by operators using their own funds, in order to outline the areas which would then be deployed using public funds (public initiative areas). Orange provided commitments to deploy FTTH networks across a large part of the territory. In particular, in November 2011, Orange and SFR reached an agreement on the sharing of their deployments to avoid overbuild (approved by the Competition Authority).
- 2018 to present: this period was marked by the organization of deployments in public initiative areas, with opportunities for Orange to expand its footprint in those areas. The "Plan France Très Haut Débit", combining public and private investment, was launched by the French government in 2013 and aimed to provide nationwide access to highspeed internet by focusing on the deployment FTTH in rural areas. These deployments were based on calls for tender from local authorities.

Orange underlined that the symmetric framework, which provided regulatory clarity, gave the right market incentives for operators to invest and deploy FTTH networks throughout France. The result is that there has been a progressive and structured deployment by Orange of its FTTH network from 2007 to 2024, aligned with national regulatory and policy frameworks.

During following discussions, it was highlighted that 97% of premises passed in France are served by at least three internet service providers, resulting in comprehensive competition.

In response to a question on how the calls for interest went, and how Orange reached an agreement with SFR, Orange explained that it was a result of the regulation, in particular ARCEP's 2010 decision which organizes the practical aspects of deployment and notably lays out rules on public consultations prior to deployment, as well as on co-investment[1]. This framework pushed to avoid overbuild but does not prohibit it. Orange highlighted that overbuild does exist in France in very limited areas (La Réunion), but that on the continent, Orange and SFR decided to invest to optimize the roll-out maximizing the possibilities of co-investing/co-financing network rollout, and vice-versa.

It was pointed out during the discussion that France is amongst the success stories in Europe regarding coverage and take-up, with Orange playing an important role. It was also underlined that this was probably in part due to the will of the French regulator to push in that direction very early on. Another important aspect seems to be the general availability of civil engineering infrastructure, as well as the possibilities created by co-investment. In response, Orange

[1] The reference here is not to the co-investment procedure under Art. 76 EECC.

agreed that civil engineering infrastructure played an important role in the deployment of FTTH networks in coherence with ARCEP's 2007 decision on asymmetric regulation on Orange's ducts and masts. ARCEP went very far by imposing strict equivalence of inputs based on non-discrimination and mandatory co-investment offers. It was concluded by stating that the combination of the symmetric framework and the asymmetric regulation on Orange's PIA was part of the success of the French FTTH deployment.

In response to a question on the role of the Competition Authority, Orange pointed out that every decision adopted by ARCEP was submitted for opinion to the Competition Authority and they played a crucial role in the approval of the 2011 agreement between Orange and SFR.

2.2. The German Case

The German case was presented both from the perspective of BREKO (alternative operators association) and the perspective of Deutsche Telekom (DT) (the incumbent SMP operator).

The BREKO presentation started with some background information on the German market. According to BREKO, the fibre deployment in Germany started comparatively late as the optimization of the copper network with vectoring resulted in a postponement of investments in fibre networks. However, in recent years, fibre deployment has picked up speed. BREKO identifies a positive dynamic, not only in terms of homes passed, but also in terms of homes connected. Based on its own market observation, BREKO notes that the DT share of homes passed is significantly higher (39% out of 22.5 Mio homes passed) than its share of homes activated (23% out of 5.9 Mio homes activated) and therefore stresses a focus of DT on relatively quick "homes passed deployment".

BREKO further claims that the problem of "strategic overbuild" is limited to the behaviour of the SMP operator. In its presentation, BREKO relied mainly on the findings of BNetzA's Monitoring Unit's interim report on "strategic overbuild" published in April 2024[2].

In this report, the following four aspects are considered potentially relevant, in the context in which it is considered that a "first mover" operator is already present with its network in the respective area:

1. The second operator restricting network expansion to lucrative core areas[3].
2. The second operator responding swiftly to the rollout activity of the "first mover".
3. The second operator merely announcing rollout without actually realizing the deployment.
4. In response to one (or more) of the aforementioned activities of the second operator, the "first mover" withdraws from its expansion, either fully or partially.

BREKO stated that under aspect one, DT would focus its network expansion efforts to profitable core areas in 53% of the analysed cases in which DT allegedly acts as the second operator. Under the second aspect, BREKO referred to the report, stating that there are signs in a little over half of relevant cases that DT would react on short notice to announcement or

[2] https://www.bundesnetzagentur.de/DE/Fachthemen/Telekommunikation/Breitband/Doppelausbau/start.html.
[3] E.g. more densely populated areas of municipality or town.

sales launches of a competitor[4]. With respect to the third aspect, BREKO claimed that, according to the interim report, DT would fail to follow through on deployment announcements in 10% of the cases in which DT is depicted to be the second operator. Finally, in the context of the fourth aspect, BREKO mentioned that there are alterations to roll-out plans by the first mover in about 20% of cases, if DT pursues a second deployment project.

BREKO further argued that the German Commitment Model of DT with their wholesale customers would result in a de-facto foreclosure of wholesale customers demand for fibre deploying altnets due to rebates for long-term commitments. Existing copper revenues would allow DT to rely on a "homes passed rollout strategy" (rather than a "homes connected strategy", which should normally be the aim of each operator deploying). The ability to bundle fixed and mobile broadband products was mentioned as another advantage of DT over many of its competitors (however not suggesting that such advantage is necessarily indicative of illegal behaviour).

BREKO regards the interim report as sufficient to demonstrate a competition problem in conjunction with overbuild and calls for regulatory actions.

DT responded with a presentation, giving a much more positive outlook on the market situation in Germany. DT alone would add 2.5 Mio new fibre connections per year going forward. According to DT, there is strong investment by all market players, with 21.8 Mio households covered by FTTH as of 2024, with the expectation to reach >50% of German households by the end of 2025.

In DTs' view, it is not the "strategic overbuild" that is responsible for hampering FTTH investment and deployment but rather other factors such as (i) the high CAPEX intensity of the business in Germany, (ii) high and in recent years significantly increased construction costs, (iii) a lack of skilled workers, (iv) restricted access to buildings and (v) the (lack of) speed of permitting process. As a consequence, according to a recent study, the cost of fibre deployment in Germany is five times higher than in Spain[5].

DT also highlighted a particular challenge of the German market due to its characteristic as a "renters nation", because landlords typically lack motivation for quickly connecting their tenants to FTTH and refuse alterations to the building in many cases. Without a written consent, the upgrade to "home connected" is impossible[6]. On the other hand, the legal options of tenants to demand fibre are purely theoretical. According to DT, some of its competitors relied on wrong expectations in their business cases. However, the new classification of fibre roll-out as being in the "overriding public interest" (new German legislation from June 2025) is a step in the right direction and will help to further speed up permitting processes.

---

[4] 77 out of 151 total cases or 51%. See point 80 of the interim Report.

[5] Glasfaserausbau in Deutschland. Aktueller Stand und Erfolgsfaktoren. Eine gemeinsame Studie von Telekom und EY Bonn und Berlin, 4. Januar 2025 https://www.telekom.com/resource/blob/1085564/c347bee42fa4141596e23261c82bfc7f/dl-250106-ey-glasfaserstudie-data.pdf

[6] These complications with upgrading „homes passed" to „homes connected" were also highlighted by a recent WIK report on the copper switch-off pilots in Germany: https://www.wik.org/veroeffentlichungen/veroeffentlichung/abschlussbericht-zur-evaluierung-des-pilotprojekts-kupfer-glas-migration-telekom-deutschland

DT finally made clear that, in its view, infrastructure competition is a cornerstone of the regulatory framework as stipulated in the EECC, and the emergence of local monopolies should be avoided. Therefore, it would be wrong to give the term “overbuild” a negative connotation.

In terms of rollout of homes connected vs homes passed, DT argued that while BREKO members wait for at least 30% contracted subscribers to the new infrastructure (i.e. fibre) before starting with deployment, DT does not follow a pre-contracting strategy and, therefore, moves without delay by building as much “homes connected” and “homes passed” as possible, currently 2,5 million/year.

DT highlights that in its view the interim report has not identified any abusive practices or misconduct, neither by DT nor by other “overbuilding operators”. DT claims that it conducts its network rollout according to the principle of infrastructure-based competition and is not engaged in a “strategic overbuild” behaviour.

In the subsequent discussion, an alternative network operator highlighted that the financial viability of infrastructure competition is a naive perspective, referring to a study by WIK[7]. Moreover, an association of alternative operators deploying fibre raised the question of why there is not a higher degree of collaboration between operators in the German market, given the large amount of investment required. With respect to the latter point, DT highlighted that the high investment needs are one of the reasons for its use of joint ventures and around 40 cooperation agreements with partners, mainly municipal utility companies. The representative of an alternative operator active in Italy suggested the use of Article 22 EECC as a tool to increase transparency, enabling better coordination of deployment plans (which is in the interest of the operators but also of the market as a whole).

Both BREKO and DT agreed that the publishing of the final report of the Monitoring Unit was of utmost importance in shaping the views on “strategic fibre deployments”.

Shortly after this workshop, BNetzA published the final report on this matter[8].

2.3. The Italian case

The Italian case was presented by a representative of Open Fiber (OF), the main FTTH network alternative wholesale-only operator.

In Italy, FTTH accounts for approximately 30% of total fixed subscriptions, achieved within a few years, with overall coverage exceeding 65%. Despite a declining trend, FTTC remains the dominant access technology, representing around 50% of active fixed lines and still covering

[7] Doppelausbau von Glasfasernetzen – Ökonomische und rechtliche Einordnung, WIK consult, Oktober 2023: https://www.wik.org/en/publications/publication/doppelausbau-von-glasfasernetzen-oekonomische-analyse-und-rechtliche-einordnung

[8] The final report was published on 30 July 2025. Further information is available on the website of BNetzA: https://www.bundesnetzagentur.de/SharedDocs/Pressemitteilungen/EN/2025/20250730_Doppelausbau.html?nn=694186

over 90% of premises. The remainder of the fixed market is mainly composed of FWA connections (around 10%) alongside legacy DSL and fixed voice-only lines.

The drivers for investment in FTTH, given the desired rate of return, are mainly: (i) density of population, and business units; (ii) macroeconomic conditions; (iii) geography of the territory (presence of mountains can reduce relevance of the area), and (iv) presence of reusable physical infrastructures. Specifically on this last point, in Italy non-telecom infrastructures accessible via GIA/BCRD regulation are also highly relevant[9].

Finally, the operator also takes into account whether (v) a competitor has deployed a VHCN network in the targeted area. In this spirit, the first mover advantage is more relevant for the alternative operator than for the incumbent in the case of new investment decisions. The regulatory framework is crucial in providing certainty for new investments in a neutral way as a certain level of infrastructure competition is positive for the welfare of consumers.

The presentation highlighted the need to differentiate the problem of overbuilding between potential competitive areas (black areas) where the viability of more than one infrastructure is possible in principle, from the rest and specifically state aid areas, as the strategic conduits can be different. In black areas, strategic behaviour can materialize even before infrastructure is deployed, through a below cost pricing announcement to deter entry.

In white areas, between 2017-2018, the competition Authority (AGCM A514 case) ascertained and sanctioned (with a fine of about 100 million Euro) a conduit of abuse of dominant position by the incumbent capable of excluding equally efficient competitors from the market. The abusive conduit was related to a strategic investment plan using FTTC/FWA solutions realized in subsidized areas, where the granted operator OF was going to build up an FTTH network. Those areas were declared not relevant for NGA coverage (including in FTTC configuration), at the time of the public consultation of the Competent Authority (CO). The anticompetitive conduit of the SMP operator featured different behaviours:

- The planned investments in FTTC solution by the incumbent were not profitable but only served to convince the competent authority to revoke the public subsidies, making it believe that the areas concerned were no longer unprofitable (regulatory gaming): the incumbent team decided to deploy FTTC networks without any economic justification, with the aim to reduce the market demand for OF. The NCA made verification through inspection on emails and internal business plans of the incumbent, that showed a return on investment lower than the company's WACC.
- The incumbent produced pretextual administrative disputes and reports to the European Commission to hinder the carrying out of the tenders, creating a climate of uncertainty that would have slowed down the outcome of the first tender.
- In the same period, in black areas, even in absence of a real saleable FTTH coverage by the incumbent, new wholesale offers have been presented to AGCOM (pre-emption strategy) and prices were lower than the average supply costs, including volume discounts and long-term contracts, with the only aim to take away potential customers from OF.

[9] An effective implementation of GIA provision is seen as crucial to reduce cost and increase the potential new investment.

Those price reductions forced OF to reduce prices in response and they cannot be increased in the current setting, even after this was deemed anticompetitive.

In a more recent situation (2024), in black areas where the incumbent has replicated the FTTH infrastructures, OF experienced a pricing strategy applied by the incumbent specifically done to address infrastructure competition: the incumbent applied a lower wholesale price where effective infrastructure competition was present, resulting in a differentiation of wholesale price at single address level[10].

Another behaviour perceived by OF as strategic (in the understanding attributed in this activity) adopted to increase uncertainty on investments done by alternative operators in FTTH is related to the copper decommissioning plan in Italy that is related only to the primary segment of the old copper network, which implies that all the FTTC lines will remain active, preventing in turn the full transition to FTTH. The risk is that the decommissioning will become a pre-emption strategy specifically in white areas where there is a more incidence of legacy voice-only and ADSL customers. At the same time, the choice to not switch-off all the copper network can increase the migration costs as two steps are needed: first the transition to FTTC and after that to FTTH. In this view, OF wishes that the public policy related to the switch-off is supervised by the Commission establishing a clear timeline, even if some flexibility can be granted for countries where the FTTH coverage is still very low. Such policy can accelerate the achievement of the public objective of having all users connected to FTTH networks. So, copper swich-off should be conducted in a way to reduce the risk of overbuild and leveraging of market power from copper to fibre.

If the strategic behaviour in white areas is easy to understand and to address, more problems are present in the context of overbuilding in black areas, where the replication in some potentially viable areas reduces opportunity of investment in other areas. In that sense, the regulatory activity on Art. 22 EECC provisions can be used to detect main strategic overbuild, as if the investments are modified in the long run, this is probably due to a strategic approach instead of a specific evaluation of the return of investment.

The following discussions focused primarily on a fair coverage declaration approach: some speakers highlighted that incumbents often declare coverage in only the most viable areas, limiting opportunities for alternative operators. To promote fair competition, enforcing full territorial coverage obligations was proposed, citing France's "*obligation de complétude*" as a good example. Some workshop participants called on BEREC, in the context of the DNA discussions, to propose a revision of the provisions in Articles 22 and 29 of the Code to prevent strategic overbuild and enable regulatory intervention.

At the same time, the debate was also related to whether the DNA revision should take into account the incumbents' copper market dominance, which can hinder new fibre investment. Policies on switch-off must balance economic freedom with mechanisms such as cost analysis to detect anti-competitive practices. Although current rules allow for intervention, some

[10] The pricing scheme have been approved by the NRA with decision (38/24/CONS) in light also of the flexibility provided to this fiber wholesale product in last market review (114/24/CONS). The decision has been appealed in the administrative court with the intention to say that the prices are below cost.

participants doubt their effectiveness (i.e. expected results by 2030, when the swich-off programs and fibre investment should be completed).

2.4. The Austrian case

Two operators (A1 Telekom and Magenta) and two associations (Open Fiber Association Austria - OFAA and Internet Service Providers Austria - ISPA) presented their views on strategic behaviour in the context of fibre rollout in Austria.

OFAA started by presenting figures about the status of fibre rollout in Austria. While urban areas are better covered than rural areas, the progress is currently faster in rural areas (also due to state aid funded projects). As regards strategic behaviour, OFAA saw a peak of overbuild actions/proposal about 2 years ago. Some operators blocked areas from subsidies but did not roll-out. In fact, very little FTTH overbuilt happened, in particular in rural areas.

Then, ISPA, which represents several small and medium-sized internet service providers (ISPs), pointed out difficulties in accessing the incumbent's subsidised fibre network. Regarding strategic behaviour, ISPA observed some cases where announcements were met by other announcements which finally led to a withdrawal of the first mover. This was mainly observed in economically interesting areas. In some cases, none of the operators actually built the network. Actual overbuilt was not observed.

Magenta, a daughter company of Deutsche Telekom, has a cable network in parts of Austria and is also investing in FTTH-networks. The FTTH rollout is focused on areas with (comparatively) low costs and strong commercial potential. Magenta did not observe overbuilt or anti-competitive foreclosure. However, in some cases parallel announcements led to delays or no investment at all. These cases happened some years ago and now things have settled again. Magenta expressed the opinion that the possibility to coordinate civil works should be limited to state aid projects. In rural areas, there is only potential for one network.

Finally, the incumbent operator, A1 Telekom Austria, presented its views on the topic. A1 presented several factors which influence the decision of investing in a certain area. The main drivers for investment decisions of A1 are related to:

- Market structure (alternative infrastructure available; current customer base; ARPU (upselling potential); fixed/mobile)
- Current performance of existing A1 infrastructure (fixed and mobile)
- Previous A1 rollout (e.g. FTTC)
- Deployment cost per household (geography, density of population, single dwelling units (SDU) versus multi dwelling units (MDU), duct availability, previous FTTC-Rollout)
- Minimum number of residents
- Availability / feasibility / commercial agreements of wholesale offers
- Support of municipality / permissions
- Development of construction costs / availability of construction resources per region
    - Planned construction work of third parties (possibility to coordinate civil works, as well as a need to change initial plans

- Launch of state aid programs

A1 also pointed out several critical issues in the context of fibre rollout, in particular high and increasing costs, as well as long permit granting processes. A1 is strongly in favour of the possibility to coordinate civil works and asked for increased transparency through the implementation of a central, cross sectoral database for planned construction works. Regarding strategic fibre networks deployment and overbuilt, A1 reported that it has been confronted with parallel rollout activities only in a handful of cases. In A1's view, the availability/attractiveness of wholesale access is an important driver for investment decisions.

In the following discussion, an alternative association representative asked about the role of duct access for fibre rollout and overbuilt. A1 and Magenta responded that there are no or hardly any ducts in their networks. A German alternative operator expressed its opinion against the mandatory coordination of civil works since it would enable strategic behaviour of SMP operators. An Italian alternative operator stated that coordination of civil works might be avoided by employing additional ducts. A German alternative operator asked about types of strategic behaviour observed and the degree of overbuilt. An Austrian association replied that actual overbuilt is rare and parallel networks are only seen in specific cases, which cannot be regarded as illustrative of strategic overbuilt behaviour.

3. Summary of stakeholders views

In France, the early passive-access mandates, asymmetric duct regulation, completeness obligations and co-investment[11] rules introduced by ARCEP, and reinforced by public-private initiatives, limited the risk of overbuilding for operators and minimised their incentive for strategic deployment. These measures also structured the FTTH rollout, achieving comprehensive coverage and widespread multi-ISP availability.

Germany's fibre rollout, which has been delayed by copper vectoring, is facing scrutiny over possible selective construction and reactive deployment, which BREKO has labelled as 'strategic overbuild' carried out by Deutsche Telekom[12]. On the other hand, DT argued that high CAPEX, labour shortages, slow permitting and landlord resistance to upgrading "homes passed" to "homes connected" are the real barriers. The classification in the new German legislation from June 2025 that fibre roll-out is considered of 'overriding public interest', joint ventures and municipal partnerships are intended to speed up the granting of permits while preserving competition.

Italy is the only case where the NCA has sanctioned a dominant operator for excluding competitors through unprofitable FTTC investments, regulatory gaming, and predatory pricing in white and black areas. Article 22 EECC could be used to tighten transparency and full

[11] In the sense of co-financing, not in the understanding of the provisions of Art. 76 of the EECC.

[12] Despite closing the Monitoring Unit in the course of publishing the final report, BNetzA will continue to follow up specific problems of competition regarding overbuild in the future. Further information is available on the website of BNetzA:
https://www.bundesnetzagentur.de/SharedDocs/Pressemitteilungen/EN/2025/20250730_Doppelausbau.html?nn=694186

coverage rules in order to deter strategic fibre deployment. To promote fair competition, it was also proposed that full territorial coverage obligations are enforced, with “obligation de complétude” in France cited as a good example. Moreover, OF remarked that a clear copper switch-off policy could benefit competition in the market.

Austria’s rural fibre rollout, driven by state aid, contrasts with rare actual parallel deployment. According to the stakeholders, high construction costs, lengthy permitting and scarce duct access overshadow strategic foreclosure. Several alternative operators ask for limiting the coordination of civil works to state aid projects to avoid potential strategic behaviours, while A1 calls for increased transparency through a cross-sectoral database.

Annex I

AGENDA

BEREC Workshop on the competitive effects of strategic fibre networks deployment, including in the context of copper switch-off

Location (hybrid)	Brussels IRG Secretariat, Rue de la Science 14
Date & Time	26 June 2024 09:30 – 16:00 CEST

09:00 – 09:30 – Opening of the virtual meeting room for login

09:30 – 9:50 – Introductory remarks

09:30 – 09:40 – **Welcome words** (BEREC Board member) *Mr. Michel Van Bellinghen (BIPT)*

09:40 – 09:50 – **Brief introduction into the topic** (MEA WG co-Chairs) *Ms. Iulia Zaim-Grigore (ANCOM), Mr. Jordi Canadell Boix (CNMC)*

09:50 – 10:20 Part 1 – Perspective of the incumbent operator in France

09:50 – 09:55 – Short introduction to the French case (MEA WG co-chairs)

09:55 – 10:25 – Orange, France – *Mr. Bertrand Vandeputte*, Fixed Network Regulatory Affairs Director

10:25 – 10:35 – Questions/comments from the audience

10:35 – 10:40 – Short introduction to the cases in Germany, Italy and Austria (MEA WG co-chairs)

10:40 – 11:40 – Part 2 – Perspectives of stakeholders in Germany

10:40 – 11:05 – BREKO, Germany – Mr. Alexis Bley, EU Public Affairs Manager

11:05 – 11:25 – Deutsche Telekom, Germany – Dr. Jakob Greiner, Vice President, European Affairs

11:25 – 11:40 – Questions/comments from the audience

11:40 – 11:55 – Coffee break

11:55 – 12:50 – Part 3 – Perspective of an alternative operator in Italy

11:55 – 12:35 – Open Fiber, Italy – *Mr. Francesco Nonno*, Director of Regulatory and European Affairs

12:35 – 12:50 – Questions/comments from the audience

12:50 – 13:45 – Lunch break

13:45 – 15:15 – Part 4 – Perspectives of stakeholders in Austria

13:45 – 14:05 – Open Fiber Association Austria (OFAA) – *Mr. Martin Wachutka*, OFAA Vice President, Managing Director of Breitband Oberösterreich GmbH

14:05 – 14:25 – Austrian Internet Services Providers Association (ISPA) – *Mr. Florian Parnigoni*, Vicepresident of ISPA, COO of Spusu

14:25 – 14:40 – Magenta, Austria – *Mr. Philipp Sandner*, Senior Regulatory Counsel

14:40 – 15:00 – A1 Telekom Austria – *Mr. Peter Klune*, Senior Expert Regulatory Affairs

15:00 – 15:15 – Questions/comments from the audience

15:15 – 15:30 – Coffee break

15:30 – 16:00 – Roundtable discussions and concluding remarks

15:30 – 15:50 – Roundtable discussions

15:50 – 16:00 – Wrap up and conclusions (MEA WG Co-chairs)

16:00 – End of Meeting