

# MASTERING EUROPEAN TELECOMMUNICATIONS REGULATION

A three-day training course



CULLEN

INTERNATIONAL

Regulation made simple

Organised by Cullen International

## The training will provide attendees with:

- a comprehensive overview of regulatory issues and developments in the telecommunications sector, using real-life examples and case studies from the European Union;
- an insight into the latest developments in the fields of broadband deployment and access regulation, interconnection and call termination, radio spectrum policy and awards, net neutrality, mobile regulation and roaming, current EU policy goals, the review of the EU regulatory framework for electronic communications and consumer protection;
- an understanding of key institutional mechanisms, notably the EU legislative process as it relates to the telecoms sector and the harmonisation mechanisms used in Europe, e.g. for market reviews and spectrum policy;
- an historical perspective on European telecoms regulation for participants to gain a clear appreciation of the key regulatory trends.

## Who should attend and why?

The seminar is suitable for:

- seasoned regulatory experts who have become specialised in a specific regulatory area but who wish to refresh their understanding of the broader range of regulatory issues;
- regulatory specialists dealing with a specific country who want to become acquainted with broader regulatory developments across Europe;
- individuals who have recently moved into a regulatory position and wish to acquire a rapid grasp of the key debates; and
- regulatory experts who wish to reflect on regulatory trends in industry.

The seminar is not designed for experts who already have a broad range of regulatory experience – please take a look at our specialist seminars.

Furthermore, the program will meet the needs of those who want to:

- gain a clear insight into the main issues of the EU telecoms regulatory framework and other relevant EU legislation, including recent developments and the ongoing framework review process;
- understand how these issues affect their own national regulatory environment; and
- learn and exchange views on emerging questions faced by the communications industry.

## The training organiser

Cullen International tracks, reports on and benchmarks regulation and competition law in four sectors – telecommunications, media, digital economy and postal - covering developments across Europe, the Americas, the Middle East and North Africa.

For over thirty years, we have been providing comprehensive, neutral, unbiased, timely information that is trusted by industry and official institutions alike. We are widely recognised as the leading regulatory intelligence provider in the field.

Our services consist of a unique range of alerts, reports, benchmarks and enquiry services that are complemented by our topical conferences and regulatory training offer.

We are also regularly selected to carry out important research and studies for the European Commission and other organisations and we are frequently sought out to chair or make presentations at industry events.



### COURSE TIMINGS

Starting at 9:00 am on the first day, and ending at 1:00 pm on the third day (followed by lunch).

>>> For future course dates, please visit our website: [www.cullen-international.com](http://www.cullen-international.com)

## PRESENTERS

### LEAD TRAINER

**Philippe Defraigne**, Founding Director at Cullen International, is widely regarded in the industry as a leading thinker on telecommunications regulation in Europe. He is a regular fixture on the conference circuit, frequently speaking at and chairing events in Brussels and beyond.

### GUEST SPEAKER

**Alexandre de Streel** (University of Namur) is a Professor of EU Regulation and Competition Law and Director of the Research Centre Information, Law and Society (CRIDS). Alexandre is also a part-time member of the Belgian Competition Authority and a regular trainer for executive courses on EU regulation and policies. Previously, he worked in the cabinet of the Belgian Deputy Prime Minister, at the Permanent Representation of Belgium to the EU and at the European Commission (DG Connect).

### TEAM OF TRAINERS

All Cullen International trainers are seasoned regulatory affairs professionals specialised in telecoms regulation. Very few have less than 10 years experience in their field of expertise.

**Veronica Bocarova**, Principal Analyst, is a specialist of Scandinavian markets, as well as working for six years on a European Commission project to assist regulators in South Eastern Europe to bring their telecoms rules in line with the EU. Before joining Cullen International, Veronica worked for Ericsson Business Consulting practice based in Stockholm.

**Jan Cisar**, Senior Analyst, is responsible for Cullen's weekly summary of regulatory highlights, as well as covering key telecoms regulatory initiatives and developments at national level. Before joining Cullen International, Jan worked for Telefónica O2 in the Czech Republic.

**Peter Dunn**, Head of Practice, leads research on telecoms regulation in Europe, pulling in contributions from our analysts and correspondents across the continent. Prior to joining Cullen International, he was working in the UK and Europe for Orange and for Colt, and for Digicel Group in the Caribbean.

**Dries Indestege**, Principal Analyst, leverages his engineering background to provide brilliantly simple explanations of the most tricky technical-regulatory topics to colleagues and clients alike. Before joining Cullen International, he was part of the regulatory strategy team of Belgacom.

**Janne Kalliala**, Principal Analyst, is leading Cullen International's Competition Law service. Prior to joining Cullen International, Janne was an associate in a law firm working mainly on competition and telecoms law.

**Matej Podbevšek**, Senior Analyst, covers key telecoms regulatory initiatives and developments at EU and national –level. Before joining Cullen International, he worked as a senior legal advisor in the telecoms team of the Slovenian NRA and was active also in BEREC.

**Elena Scaramuzzi**, Head of Americas services, is an emerging markets specialist. She has worked extensively on regulation in Latin America and Balkan countries and the application of European best practice to countries in the region. Before joining Cullen International, she was part of the regulatory team at Telecom Italia.

**Martin Schraa**, Senior Analyst, covers the Brussels beat reporting daily on the European Commission, Parliament and Council.

## PRE-COURSE OPTIONAL SESSIONS

Two half-day sessions on the day before training start.

General introduction to telecoms technology and networks

General introduction on EU institutions and processes, including a visit to one or more EU institutions

## TELECOMS TECHNOLOGY AND NETWORKS

An introductory briefing to explain the main technical terms and concepts of telecommunications technology to participants who have little prior experience in the field. It provides a sound basis for the more advanced sessions later on in the course.

Topics to be addressed include:

- access and interconnection
- telecoms network (fixed and mobile) and NGA network topographies
- fibre-to-the-curb, fibre-to-the-home, VDSL, vectoring and sub-loop unbundling

## EU INSTITUTIONS AND PROCESSES

This half-day session is recommended for participants unfamiliar with the European Union, its institutions and legislative process.

It will provide a comprehensive overview of the role and workings of the European Commission, European Parliament and the Council of the EU, highlighting the continuous struggle to balance European and national interests.

Issues addressed include:

- who are the main actors involved in establishing EU laws, policies and regulations affecting the sector?
- what are the features of the different forms of legislative instruments and other documents available?
- how does the legislative procedure work and how are laws implemented?

During a visit to one or more of the EU institutions, participants will be able to sample the atmosphere of Europe's political capital and interact with EU officials.

## TRAINING SESSIONS

### LIBERALISATION PROCESS

The European regulatory framework for telecoms has been through two major reviews in the last decade but the roots of many current policies on asymmetric regulation and entry assistance go back to the nineties.

- From individual licences to the current regime of general authorisation
- Why the liberalisation process was staggered and its influence on today's environment
- The role of national ministries, national regulators and European bodies
- The development of an EU regulatory framework

## REGULATION IN PERSPECTIVE

An abridged history and reflection on European Union telecoms regulation from liberalisation to regulated competition, addressing:

- EU policy objectives
- Investment
- Mobile regulation: termination rates, spectrum number portability

## **EU POLICY GOALS AND CURRENT EU REGULATORY INITIATIVES**

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One of main priorities of the Juncker Commission is the creation of a Digital Single Market (DSM) by 2020. Its DSM strategy aims to deliver 16 actions by the end of 2016, including a proposal for the first review of the EU regulatory framework for electronic communications since 2009.

At the same time, the Commission has to implement the provisions of the Telecoms Single Market (TSM) Regulation, in order to enable net neutrality and the abolition of retail roaming surcharges by mid-2017.

This session will:

- Look ahead at the regulatory landscape for the next few years, explaining the relationship between the DSM, TSM and previous Commission ICT strategies
- Provide the political background in which the TSM Regulation was conceived and adopted
- Give the latest insights on the ongoing EU regulatory framework review

## **MARKET ANALYSIS**

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The basics of the EU market analysis review system, addressing the questions what should be regulated, who should be regulated and how should it be regulated.

- Market definition, significant market power (SMP) and remedies
- Recommendation on relevant markets
- Possible future approaches

## **EU HARMONISATION (ARTICLE 7 / 7A)**

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The Article 7 and 7a procedures are designed to ensure that NRAs harmonise their approach to the definition of markets, the assessment of SMP and the application of appropriate remedies. In these procedures, the divergent views of the Commission, NRAs and BEREC often clash in terms of what constitutes an appropriate level of market regulation.

- How do these harmonisation procedures operate in practice?
- What do recent cases tell us about the approach taken by NRAs, the views of the Commission and BEREC?
- What trends can be observed?

## **CALL TERMINATION**

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Explains the principles behind the regulation of fixed and mobile call termination and the implementation of regulations:

- Addressing the natural monopoly for terminating calls
- Symmetry of termination rates
- Cost accounting approaches – imposition of pure LRIC by the European Commission
- Waterbed effect

## **FIXED ACCESS**

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This session looks at the different wholesale fixed access markets, recently revised in the Commission's 2014 recommendation on relevant markets, and now redefined as:

- Wholesale local access (market 3a)
- Wholesale central access (market 3b)
- High quality access (market 4)

NRAs face a range of challenges in these markets, including whether and how to regulate:

- Fibre access (in light of the Commission's 2010 NGA recommendation and the 2013 recommendation on non-discrimination)
- Geographic markets
- Access to cable networks

## **MOBILE ACCESS**

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Assesses the main EU regulatory approaches to wholesale mobile access:

- Passive and active infrastructure sharing
- National roaming
- Mobile virtual network operator (MVNO) – types and business models

## **RADIO SPECTRUM FRAMEWORK**

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An overview of the main regulatory framework and relevant institutions shaping spectrum policy, including the European Commission, RSC, RSPG, CEPT, ITU and the role of ITU members (individual countries). The session also covers:

- EU policy goals
- EU law and regulation
- Regulatory approaches
- Future developments

## **RADIO SPECTRUM REGULATION AND AWARDS**

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There is now a firm focus on the need at global and European level to make available sufficient radio spectrum to meet the demand for mobile broadband services. This was clearly demonstrated at the 2012 and 2015 World Radio Conferences and is reflected in the European Radio Spectrum Policy Programme.

While most EU Member States have awarded spectrum in the 800 MHz and 2.6 GHz bands, new awards are now being planned for 700 MHz, as well as supplementary bands, such as the 1.4 GHz band. This session reviews:

- The different properties and values of spectrum bands
- How radio spectrum is managed and regulated, including licence conditions
- Techniques and measures to enhance efficient use of spectrum, including trading and white spaces
- The future use of the UHF band and refarming
- Different spectrum award mechanisms
- How spectrum auctions are organised
- Recent spectrum awards in the EU

## NET NEUTRALITY

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The Telecoms Single Market (TSM) Regulation imposed net neutrality in the EU as of end of April 2016. This session explores the underlying issues of the debate in Europe, balancing the desire for consumer choice with the need to pay for the investments needed to upgrade networks to cope with the forecast growth in data traffic.

The session will cover:

- Current net neutrality rules compared with the EU 2009 regulatory framework
- National cases and the role of regulators
- Net neutrality in the EU compared to the US
- Zero rating
- The BEREC guidelines implementing the TSM Regulation
- New business models to sustain network investment (the possible emergence of a two-tier internet)

## INTERNATIONAL MOBILE ROAMING

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The price of international mobile roaming has been regulated inside the EU since 2007. The third edition of the EU Roaming Regulation came into force on July 1, 2012. It continues the downward trend in the regulated price caps, and introduces caps on retail prices for data roaming. A new 'decoupling' option was introduced in July 1, 2014, enabling customers to choose a different provider for roaming services than their domestic mobile provider. However, the 2015 TSM Regulation sets out that all roaming surcharges must be abolished by June 2017. This session looks at:

- How roaming works
- Price caps
- 'Bill shock' protection measures
- The success (or otherwise) of decoupling measures
- The impact and future practical implementation of the TSM measures to abolish roaming surcharges

## SPECIALISE IN COMPETITION LAW IN THE TELECOMS SECTOR

**A one-day seminar, conveniently attached to the Telecoms Masterclass, focusing on the application of competition law in the telecoms sector. This training will provide attendees with:**

- An overview of the relationship between competition law and the approach to economic regulation developed specifically for the telecoms sector;
- In-depth analysis and understanding of the key competition law concepts applied in the telecoms sector and relevant cases covering anticompetitive agreements, abuses of dominance and mergers;
- A chance to discuss competition law issues with experts and peers, and to compare experiences and different regulatory approaches.

## The venue

The training course will be held in Brussels, Belgium, usually in a 4-star hotel near the EU district and/or the city centre. Delegates at the training benefit from special accommodation prices at the course venue when booking in advance. A hotel booking form will be sent to you together with the confirmation of your registration at the training course.

# For more information

On the programme, contact Philippe Defraigne

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phil.defraigne@cullen-international.com

On administrative questions, contact Sarah Vergote

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## How to register ?

Please register by filling in the respective registration form on our website:

[www.cullen-international.com](http://www.cullen-international.com)

## Fees

Fee (VAT excluded\*) per delegate

<b>Early bird fee (up until 2 months before the training date)</b>	<b>€ 1,800</b>
<b>Standard fee</b>	<b>€ 2,000</b>
<b>Specialise in Competition Law in the Telecoms Sector</b>	<b>€ 1,000</b>
<b>Pre-course optional sessions</b>	<b>€ 500</b>

10% discount for multiple registrations from the same organisation

The fees include the documentation materials, the refreshments, lunches on the three days and social events. They do not include accommodation.

\* No VAT chargeable on bookings by participants from the European Union who are subject to VAT in their country or by non EU participants. Belgian VAT (21%) is chargeable on bookings by European participants who are not subject to VAT.

Upon receiving your registration, we will send you an invoice to be paid within one month and in all cases before the event. Payment can be made by bank transfer, by cheque, or online via Paypal. In the absence of payment by the due date, Cullen International reserves the right to reallocate places.

## TRAININGS AND CONFERENCES GENERAL TERMS AND CONDITIONS

### A. Limited number of delegates

To ensure a high quality training/conference experience, the number of participants in the training/conference programme will be limited. Cullen International reserves the right to refuse registrations once the maximum number of participants is reached.

### B. Cancellations / substitutions

Cancellations must be made in writing. Full refunds will be paid only if cancellations are received by Cullen International 14 days before the start of the training/conference course.

For trainings, in case of cancellations within 14 days before the start of the training course, a refund will also take place but an amount of 300€ will be charged for administrative costs.

If the delegate registers to a subsequent training course that takes places within one year from the date of the training for which the registration was cancelled, the amount of 300€ will be deducted from the cost of that subsequent training course.

Delegate substitutions can be made at any time. They must be communicated to Cullen International before the start of the course.

### C. Non-attendance

In the event of non-attendance, full training/conference fees will remain payable and no refunds will be paid.

### D. Changes to programme, venue or date

Cullen International reserves the right to make changes to the programme, the venue and the presenters. Cullen International also reserves the right to cancel or reschedule the training/conference if there are insufficient participants. Delegates will be notified in good time and will be entitled to a refund of the fee if the training/conference is cancelled or is changed to a date which is not convenient for the delegate.

### E. Invoicing and Payment conditions

Registrations will only be effective after payment receipt and payment must be done before the event takes place. Cullen International reserves the right to refuse attendance of a participant whose invoice has not been paid prior to the event.

Cullen International also reserves the right to refuse registrations to members of organisations who had registered participants to previous events and not paid their invoices.

The delegate shall provide, while registering to attend an event, all requested information necessary for the issue of the invoices. All invoices are payable in total, for the amount invoiced including the taxes stated on each invoice (VAT). No withholding for tax or administrative reasons will be accepted.

### F. Data protection

Your personal data will be used for the purpose of organising the training or conference. Cullen International will also subsequently use such data to inform you of its future training programmes and other activities or services, unless you opt out by sending us an email. Your personal data will not be communicated to any third parties.

### G. Confidentiality and Copyright

All Cullen International training/conference material is subject to normal copyright conditions. Any copy is subject to prior written authorisation from Cullen International. The training/conference material is for the delegate's own use and may not be disclosed to any third party. It shall be treated with a high level of confidentiality, in the same way as the delegate protects its own confidential information.

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