



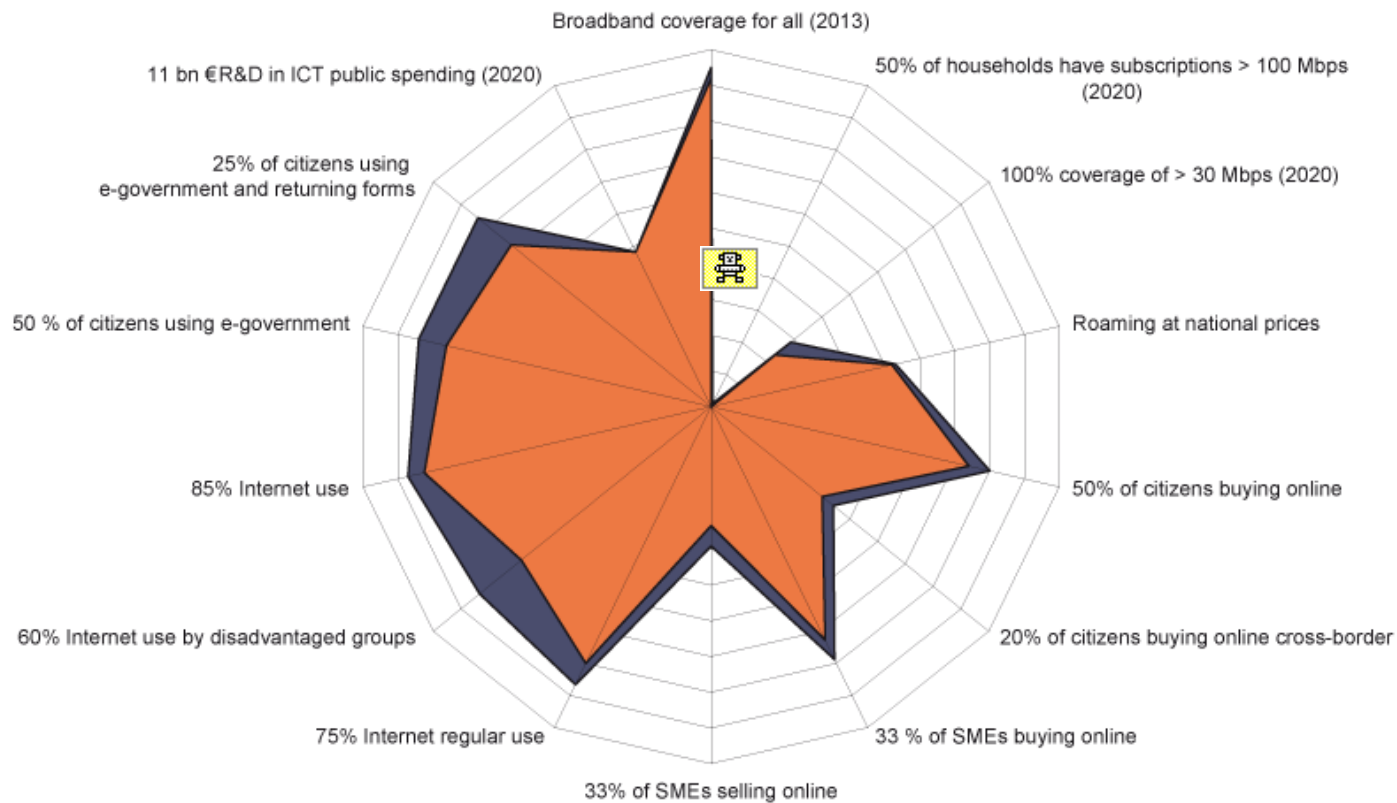
Investment to future-proof EU economy

Anna Krzyzanowska, European Commission
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The EU Digital Agenda - High speed broadband is far from reality



How the EU scores on the Digital Agenda targets



Orange = 2010, dark blue = 2011. Labels refer to targets; outline is 100% achievement; targets refer to 2015 unless otherwise stated. 20% reduction in energy use not included.





High speed internet EU policies

- *Regulatory Framework for Telecommunications*
- *Digital Agenda: Promotion of National Broadband Plans, best practices plus pilot for project bonds*
- *Structural funds:*
 - **In 2007-2013: ~ 3bn in grants for broadband administered directly by Member States**
 - **For 2014-2020: Digital support still present, in particular for areas in need of convergence initiatives but key focus on RDI, SMEs and renewable energy**
- *Connecting Europe Facility*
 - **For 2014-2020: 9.2 billion EUR Broadband & Digital Service Infrastructures**





Broadband

Policy rationale

- **Europe 2020 broadband objectives (access: 100% of households at 30 Mbps; use: 50% of households at 100 Mbps)**
- **Portfolio of projects enabling fast and ultra-fast internet access**

Categories of target areas

- **Urban areas: not a priority, as the market should deliver**
- **Sub-urban areas: tipping the scale through innovative financial instruments**
- **Rural areas: grant support**





Potential beneficiaries:

- **Telecoms (incumbent or new entrant)**
- **Utilities**
- **Regional bodies, including municipalities**
- **New alliances and partnerships, including equipment providers**

PPPs





A bit of history

Market liberalisation

Significant Market Power (SMP)

Regulatory aspects for PPP in telecom

Regulatory Framework for Electronic Communications

- The role of the Commission vs National Regulatory Authorities (NRA)
- Definition of relevant markets
- Coherence in implementation and regulatory certainty
- The concept of control

State aid

- Market investor principle
- Open access





Removing regulatory obstacles on the supply side

- **Planning laws and rights of way**
- **Access to ducts (including non-telco ducts)**
- **Transparency and co-ordination of civil works**
- **In-building wiring**

Level playing field between platforms

Spectrum availability

Demand stimulation (digital champions, cloud)

Net neutrality





Thank you

Anna.krzyzanowska@ec.europa.eu