

# Session 1: Keynote Presentations Speeches

## Conference Chairperson

**James Allen**, *Partner*, Analysys Mason

## Morning Chair

**Gérard Pogorel**, *Professor of Economics*, TELECOM ParisTech (ENST)

## Keynote Speakers

**Reinald Krüger**, *Head of Unit - Information Society and Media Directorate-General*,  
European Commission

**Annegret Groebel**, *Managing Director*, BNetzA (I/ERG Chair 2009)

## Speaker Biographies



**James Allen** is principal consultant and head of Analysys' Pricing, Costing and Regulation division. James specialises in developing both quantitative and qualitative modelling tools and techniques and has an in-depth knowledge of a wide range of the telecoms market, covering broadband fixed access, 3G networks, and next generation data services. He has also worked on topics including technology choice, LLUB in Europe, regulatory costing of DSL, a UMTS licence bid, a global market forecasting system, an IP access product portfolio, an ASP service design, and a start-up business plan used in successfully obtaining VC funding.



**Gérard Pogorel** is Professor of Economics and Management at Ecole Nationale Supérieure des Télécommunications, (ENST, Paris). He has presented papers and chaired conferences and panels on Spectrum policy and Telecom and media regulation at numerous events in Brussels, other European capitals, the US and Asia. He has been a member of the Steering Committee of the French Ministry of Industry "Spectrum Trading" Task Force. He acted as evaluator, auditor, and reviewer for the NSF, Harvard Business Review, Research Policy and EU research programs in Information and Communications Technologies. He has been a frequent member of monitoring committees (composed of independent experts) of the EU Framework Research Programme, Chair of the Monitoring Panel for 2000-2001, Chair of the Monitoring Committee of the European Union Information Society and Technologies Research Programme for 2001-2002. Gérard has published numerous articles, books, and reports including: « DTT and Digital Convergence: A European Policy Perspective » (with G. Fontaine) in «

Towards Digitalisation in Broadcasting: Policy and Practice », Cave M. & Nakamura K, eds, « Towards More Flexible Spectrum Regulation" WIK-BNetzA report (co-author), « Radio Spectrum Policy and Management - A Turning Point », (Communications & Strategies), "Networks, Machines and Portfolios: Technology Decision-making in large corporations", "Technology Management and Corporate Strategy", and "Global Telecommunication Strategies and Technological Changes". He has been on the international panel of experts for the World Competitiveness Yearbook, (IMD, Lausanne) since 1996, and is also a member of the Board of Directors of the International Telecommunications Society (ITS).



***Reinald Krüger is to speak on behalf of Mr Fabio Colasanti, Director General for “Information Society and Media” at the European Commission***

**Reinald Krüger** is Head of Unit in the Information Society and Media Directorate-General of the European Commission and responsible for the Article 7 Consultation Mechanism on national regulatory measures in the electronic communications sector. Reinald started his career in the European Commission in 1995. Until 2000, he worked as Administrator in the Industry Directorate-General on trade and industrial policy related tasks (steel and chemicals). He then moved to the Competition Directorate-General where he headed until 2004 the Task Force “Telecom Consultation Mechanism” which scrutinised draft regulatory measures notified by national authorities. Until 2008, he was Deputy Head of Unit “Antitrust Telecoms” and Case manager of major antitrust telecoms cases under Article 82 of EC Treaty. Before he joined the Commission, Reinald was Head of

the Research Group “Industrial Economics and Competition Policy” at one of the leading German economics research institutes, the HWWA-Institute in Hamburg. In 1989, he was a Consultant with the US antitrust authority Federal Trade Commission (FTC), and in 1990 a Competition Expert to the World Bank. Reinald is an economist by training and author of 34 publications in the areas of industrial economics, competition policy and transition economics.



**Dr. Annegret Groebel**, born 1960, has been Head of Section ‘International Co-ordination’ in German Regulatory Authority for Telecommunications and Post since 2001. She also holds key positions at the Independent Regulators Group (IRG, a group of European National Telecommunications Regulatory Authorities created in 1997) since 2001 and was appointed IRG Coordinator in September 2004. She is also actively involved in the work of the European Regulators Group (ERG). BNetzA will be I/ERG Chair 2009. Since 1997 Dr. Groebel has been working for the German Regulatory Authority for Telecommunications and Post, which was renamed Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railway in July 2005. She started as a member of the Ruling Chamber for Interconnection and Access and took over the unit for International Coordination directly reporting to the President in 2001. Since then she is responsible for all contacts to other European and non-European regulatory bodies as well as for the contacts with the European Commission. Since July 2005

the coordination with the energy regulators including the relevant groups (CEER/ERGEG) were added. Since October 2005 she was promoted to become Chief of Staff (Managing Director) for all staff units reporting to the President (such as the litigation unit, press office etc.) Apart from her professional duties, she has also been lecturing for a considerable time on different subjects in economics, finance, social policy, trade policy and European Integration, as well as the subject on the regulatory framework in the German telecommunications market at different universities and vocational training academies in Germany and Switzerland. She has an excellent knowledge of the European regulatory framework for electronic communications and its implementation. She has experience in advising public authorities on regulatory reform and sector specific regulation. Dr. Annegret Groebel is the author of various publications in the field of telecommunications and regulation. Dr Groebel’s education includes Diploma in Economics, University of Heidelberg (1986), Dr. rer. pol., University of Mannheim (1996) and M.A. (Master of European Administrative Management), FH Bund (Bruehl) (2004)

# Session 2: Mobile termination pricing principles

- *The EC's new proposals – what are the underlying principles*
- *Why should there be mobile termination charges?*
- *Which services should bear the burden of cost recovery?*
- *The differences between LRIC and LRAIC+...in principle*
- *What types of efficiency measures are increased with the EC's proposals?*
- *Are there detrimental economic effects – and if so, where are they?*
- *Economic externalities – how do they change?*

## Speakers

**Benoit Loutrel**, *Deputy Director-General, ARCEP*

**Martin Cave**, *Director, Centre for Management Under Regulation, Warwick Business School, University of Warwick*

**Jonathan Sandbach**, *Head of Regulatory Economics, Vodafone Group*

**John Blakemore**, *Director of European Regulatory Affairs, Hutchison 3G*

## Speaker Biographies



**Benoit Loutrel** was born in 1968, and is a graduate of Ecole Polytechnique, Ecole Nationale de la Statistique et de l'Administration Economique (ENSAE) and Toulouse University. After starting his career as an economist at INSEE, the French statistics and economic studies institute, he was appointed, in 1996, advisor to the French representative at the Executive Board of the World Bank Group in Washington. In 2000, he joined the infrastructure department of the International Finance Corporation as investment officer and then head of the European desk. He joined ARCEP, the French telecommunication and postal regulator in 2004 as director of the Fixed and Mobile Market Regulation Department and was appointed Deputy Director-General in 2007.



**Martin Cave** is Professor and Director of the Centre for Management under Regulation, Warwick Business School. Until 2001 he was Professor of Economics at Brunel University. He specialises in regulatory economics, especially of the telecommunications and Broadcasting. He has advised a number of Regulatory Agencies in Telecommunications and Broadcasting. As well as his academic work he has also undertaken studies for the European Commission and advised regulatory agencies. He was a member of the Competition Commission from 1996 to 2002. He is the author of the Independent Review of Spectrum Management (2002) for the UK Government, co-author of Understanding Regulation (1999) and co-editor of the Handbook of Telecommunications Economics (Vol. 1, 2002, Vol. 2, 2005). As well as his academic work he has also undertaken studies for the European Commission and advised regulatory agencies. He was a member of the UK Competition Commission from 1996 to 2002. He has advised the European Commission on broadband and international roaming issues, and has assisted

energy, postal, telecommunications and water regulators agencies in the UK, Ireland, France, Germany, Greece, Portugal, Cyprus, Singapore and elsewhere. He is responsible for two studies of spectrum management carried out for the Chancellor of the Exchequer in the UK, and co-author of a web-based guide to spectrum management prepared for the World Bank and the ITU. In 2006 he is special adviser to the European Commissioner for Information Society and Broadcasting. He is president of ThinkTel, an international think tank on telecommunications based in Milan.



**Jonathan Sandbach** received a BA 1st class degree in Mathematics and Economics from the University of York, an M.Sc in Statistics passed with distinction from the London School of Economics, and a Ph.D from City University, London. He worked for 11 years within British Telecom, holding a number of posts as a professional economist in roles that included revenue and cost forecasting, and business modelling. His last position for the company was as Head of Economics and Forecasting within the Corporate Finance Department, where he was involved in economic/financial modelling to support acquisition and divestment activities. He joined NERA (National Economic Research Associates) in 1990, working on a wide range of projects for clients in telecommunications, postal and other utility industries, across Western Europe, East Asia and the Americas. These projects included regulatory policy and strategy, strategic planning, business planning, pricing, network interconnection, and network cost modelling. Dr. Sandbach joined Cable & Wireless in 1998 as a regulatory

economist. In October 1999 he was promoted to Director, Economic & Regulatory Analysis for the Cable & Wireless Group. In January 2003 he moved to become Vice President, Government and Regulatory Affairs for Cable & Wireless Asia, based in Tokyo. In May 2004 Dr. Sandbach joined Vodafone Group as Head of Regulatory Economics, within the Group Public Policy Department.



**John Blakemore** is Director of European Regulatory Affairs for the 3 Group, part of the Hutchison Whampoa Limited telecommunications division. In this capacity, he is responsible for representing the 3 Group businesses in Europe and has day-to-day contact with the European Institutions. John reports directly to Christian Salbaing, Managing Director - European Telecommunications of Hutchison Europe Telecommunications Limited. John coordinates the work of the 3 Group's European Regulatory Forum, which comprises the regulatory directors from each of the Group's 6 operating companies in the EU. In that role, he co-ordinates Group positions on regulatory topics and Group responses to consultations at the EU level. John has worked in the telecommunications industry for 6 years. Prior to that he was at the UK's competition authority, the Office of Fair Trading, where he was Chief Financial Analyst. There he was responsible for the financial analysis of competition cases involving abuses of dominance, anti-competitive agreements and mergers. John has a first degree in economics, an MSc in finance

and is a qualified accountant. John is a British citizen.

# Session 3: Practical implications of EC proposals for regulators

- *What must bottom-up models provide in the new costing regime?*
- *Will existing LRAIC+ models give accurate results?*
- *Is there a pan-European model that is repeatedly applicable to all member states?*
- *What role will top-down models have in the new approach? Can they be used by mobile operators to determine the ultimate LRIC results sought by the EC and how?*
- *What are the information demands placed upon market parties for developing a model in collaboration with a regulatory process?*
- *Can incremental costs be close to zero – and if so, in what circumstances?*
- *How can long-run common costs be defined?*

## Presentation

**Ian Streule**, *Senior Manager*, Analysys Mason

## Panellists

**Emily O'Reilly**, *Case Handler/Analyst – Unit B-5*, DG INFOSOC, European Commission

**Tom Kiedrowski**, *Principal*, International Policy, Ofcom

**Giovanni Cazora**, *Economist Officer*, AGCOM

**Eric Debroeck**, *Senior Vice-President Group Regulatory Affairs*, Orange France Telecom

## Speaker Biographies



**Ian Streule** joined Analysys Mason in 1997, and has executed, managed and directed a range of projects in the area of mobile telecoms, focussing recently on mobile regulation. He has assisted leading regulators with mobile termination cost modelling, including Ofcom, the ACCC and OPTA. Ian led our detailed 2G and 2G/3G cost modelling projects in Scandinavia: in Norway, Sweden and Denmark. Ian has also directed or advised projects on mobile termination regulation for ARCEP, BIPT and the EETT. Alongside his work for regulatory bodies, Ian has also directed and managed similar projects for mobile operators. He has contributed to the projects developing 2G and 3G LRIC models for mobile operators in various regions of the world, including Europe, Africa, Asia, South Korea and South America. His experience extends to related issues such as network externalities and (inter)national roaming.



**Emily O'Reilly** joined the European Commission in October 2007 and works for DG Information Society and Media in the unit responsible for procedures related to National Regulatory measures. This primarily involves examining draft regulatory measures notified by National Regulatory Authorities as well as contributing to the preparation of Recommendations on a consistent application of the regulatory framework. Prior to joining the Commission, Emily worked from May 2006 as an economist with the Commission for Communications Regulation (ComReg) in Ireland providing general economic advice in the area of telecommunications regulation. Over the period November 2002 to April 2006, she also worked as a case officer/economist with the Monopolies Division of the Irish Competition Authority. This involved investigating and assessing alleged abuses of dominance and potentially anti-competitive agreements, as well as assisting in the Authority's general advocacy/advisory function. In terms of academic background, Emily has a bachelor's degree and MSc in the field of economics whilst also having a

postgraduate diploma in EC competition law.



**Tom Kiedrowski** is a Principal within Ofcom's International team. He is Director on a project looking at the future of termination pricing and its alternatives, working closely with the Mobile Sector Assessment team. His team contributed both to the ERG and the UK government responses to the Commission's consultation on the termination recommendation. Tom is also Ofcom's representative within the ERG NGN Project Team. Within Ofcom, he is regulator's net neutrality policy manager and as part of the EU Framework Review Project Team, he is responsible for next generation core and access networks and functional separation. He is member of Chatham House, the Royal Television Society, and of international editorial board of the journal, Communications & Strategies. He has a Masters degree in International Political Economy from the University of Warwick.



**Giovanni Cazora** is an Economist Officer within the telecommunications sector in the Department of market analyses in AGCOM. Giovanni is currently in charge for making a new cost model of mobile termination services in AGCOM and is lecturer - at the Tor Vergata University in Rome - in antitrust and regulation of public utilities (MSc). Giovanni has worked within several ERG project team among which wholesale leased lines, universal service obligations and mobile termination rates. He has hold a MSc in Economic Regulation and Competition at The City University of London (2000) and is specialised in regulatory accounting issues, cost model and WACC calculation.



**Eric Debroeck** was appointed Senior Vice-President Regulation at France Télécom in September 2004. Since July 2008, he has headed the Group regulatory Affairs. From August 2000 to August 2004, he was Director of national carrier services, developing wholesale business activities with national competitors. From 1992 to 2000, Eric Debroeck held management positions at France Telecom in the areas of national, European and international regulation. From 1989 to May 1992, he worked within the Posts and Telecommunications Ministry on fixed network and services regulatory issues. Eric Debroeck is a graduate of the Ecole Polytechnique and the Ecole Nationale Supérieure des Télécommunications.

# Session 4: The pricing implications of mobile termination regulation into the future

- *What can we learn from markets that have never applied calling-party-pays mobile termination?*
- *Is Bill-And-Keep the ultimate outcome in the long term? Will other methods for recovering the costs of delivering mobile termination emerge?*
- *Prices will change – but how?*
- *When and how will the EC's new proposals affect consumers and competition?*
- *What are the implications for mobile data services?*
- *Will the new approach give rise to better fixed-mobile-convergence?*

## **Presentation:**

**Jeff Richardson**, *Director of Strategy, BT*

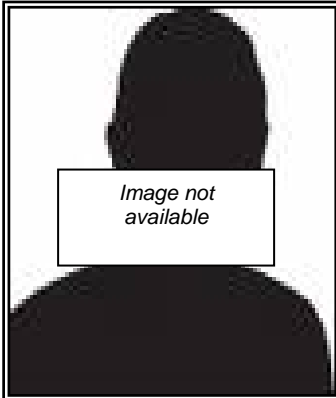
## **Panellists:**

**Yves Blondeel**, *Managing Director, T-REGS*

**Bernardo Herman**, *Regulatory Affairs Manager, ETNO*

**Erzsebet Fitori**, *Regulatory Affairs Manager, ECTA*

## Speaker Biographies



**Jeff Richardson** is Director of Strategy in BT Retail. In this role he has led BT's appeal against Ofcom's most recent determination of mobile termination rates; this appeal has been substantially upheld by the Competition Commission which found that the rates set by Ofcom were 20% too high. Prior to his current role, He has also held a wide range of product management, finance and general management positions in BT. Prior to joining BT he was a management consultant and civil servant.



**Yves Blondeel** has been Founder and Managing Director of T-REGS b.v.b.a. from 1995-present, a specialist consultancy in telecommunications regulation. Focus is on national telecommunications regulation in the EU Member States and in Switzerland and Norway, as well as EU-level regulation. T-REGS conducts work for network operators, service providers and Internet companies, in the context of development and implementation of strategies, including seeking regulatory clearance for innovations, rights-of-way, frequency rights-of-use, numbering resources, etc. negotiating access and interconnection, etc. Regulatory authorities seeking an independent review of drafts of regulation and equipment suppliers and financial investors in the telecommunications sector. From 1991-1994 Yves was a partner at Cullen International S.A, a company specialised in ongoing monitoring and periodic reporting on telecommunications regulatory affairs. From 1990-1991 Yves was a student employee of Citicorp N/A, producing reports on national telecommunications regulation in Europe. Yves has a

BDiploma Licentiaat Communicatiewetenschappen from Vrije Universiteit Brussel (1989)



**Bernardo Herman** was appointed Regulatory Affairs Manager with the European Telecommunications Network Operators' Association on 15 May 2006. He is responsible for developing and delivering on the regulatory and policy agenda at ETNO. Before joining the association, he worked seven years in the telecom sector holding different legal positions: With the Belgian National Regulatory Authority (BIPT), he was in charge of the legal coordination and assessment of markets analysis. As Wholesale Contract Manager with Base, a KPN subsidiary, he managed legal and regulatory issues related to partnerships with Mobile Virtual Networks Operators. As Corporate Affairs Manager within the same company, Base/Orange, Bernardo contributed to key company objectives: network deployment, mobile payment, competition disputes. Bernardo Herman holds a Master in law from the University of Louvain-La-Neuve.



**Erzsébet Fitori** is currently Regulatory Affairs Manager at ECTA (European Competitive Telecommunications Association), the trade association representing 150 competitive operators across Europe. Prior to joining ECTA in February 2008 she was Head of Regulatory Affairs at Pannon GSM (Telenor Group) in Budapest. Erzsébet's early career saw her as an assistant professor in the Department of European Law and Private International Law at the University of Miskolc in Hungary, following traineeships at the European Central Bank's EU Institutions and Fora Division in Frankfurt and at law firm Baker & McKenzie in Budapest. Erzsébet holds an LL.M. in European Community Law from Leiden University and a Degree in Law from the University of Miskolc, Hungary.