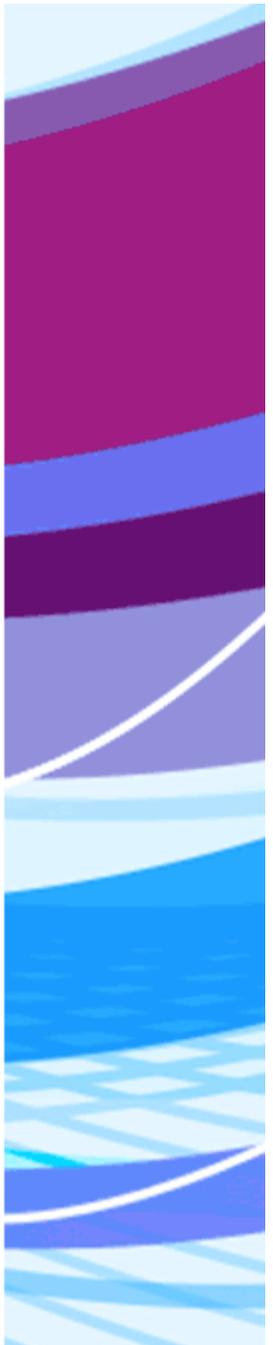




# An Industry view: Policies for 5G, spectrum and innovation

ITU Forum  
"Towards 5G Enabled  
Gigabit Society"

**Marta Capelo**  
Director of Public Policy  
[www.etno.eu](http://www.etno.eu)





**Vision**



**Numbers**



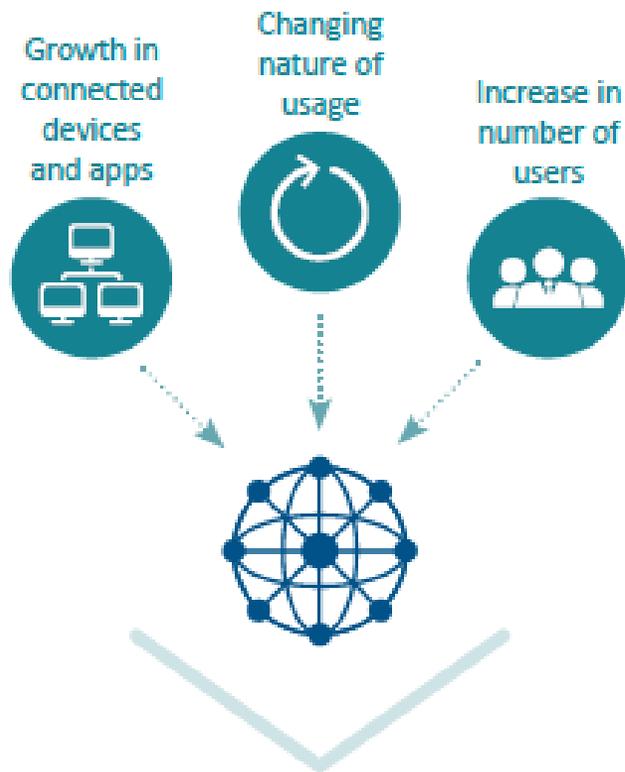
**Policies in the EU**



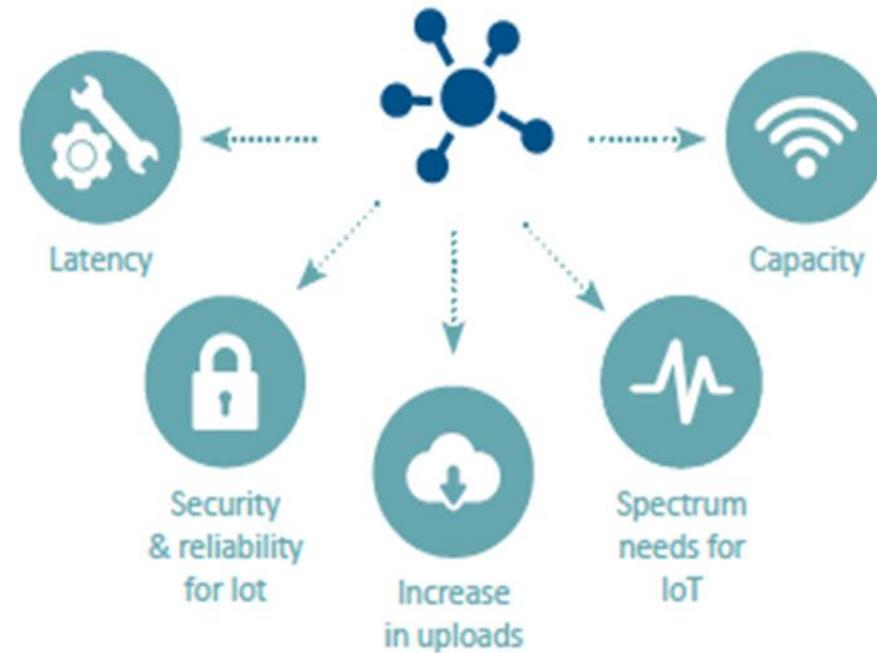
# Our vision : 5G : revolution or evolution ?

## NEW NETWORK REQUIREMENTS <sup>(1)</sup>

### DRIVERS OF NEW NETWORK REQUIREMENTS



### NEW NETWORK DEMANDS



<sup>(1)</sup> Source: ETNO elaboration on BCG chart (2015)



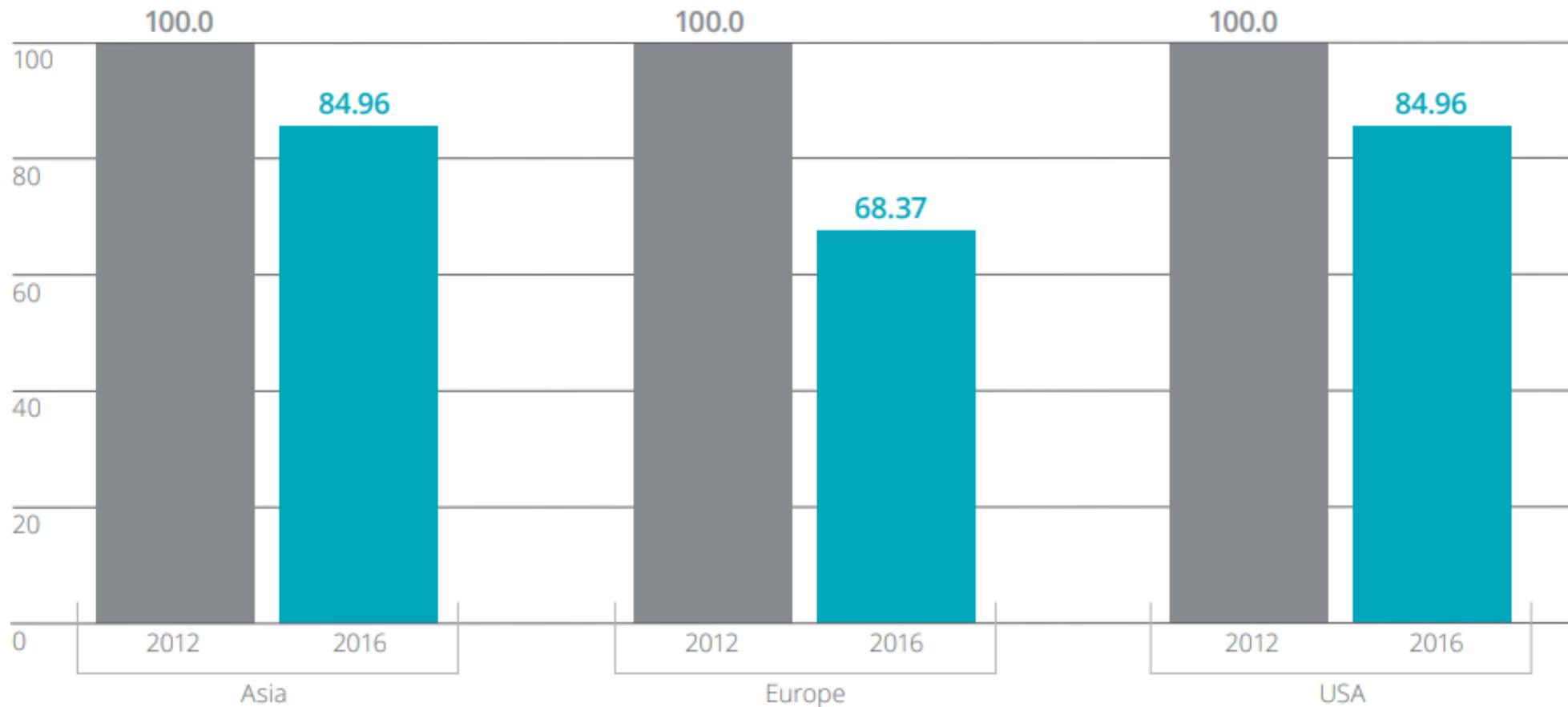
*Ceci n'est pas un téléphone.*

# DEPLOYING THE EU GIGABIT SOCIETY

|   |               |
|---|---------------|
| <b>ULTRAFAST BROADBAND<br/>(FTTC, FTTH)</b> | <b>€360BN</b> |
| <b>5G RADIO ACCESS NETWORK</b>              | <b>€200BN</b> |
| <b>PROXIMITY DATA CENTRES</b>               | <b>€100BN</b> |



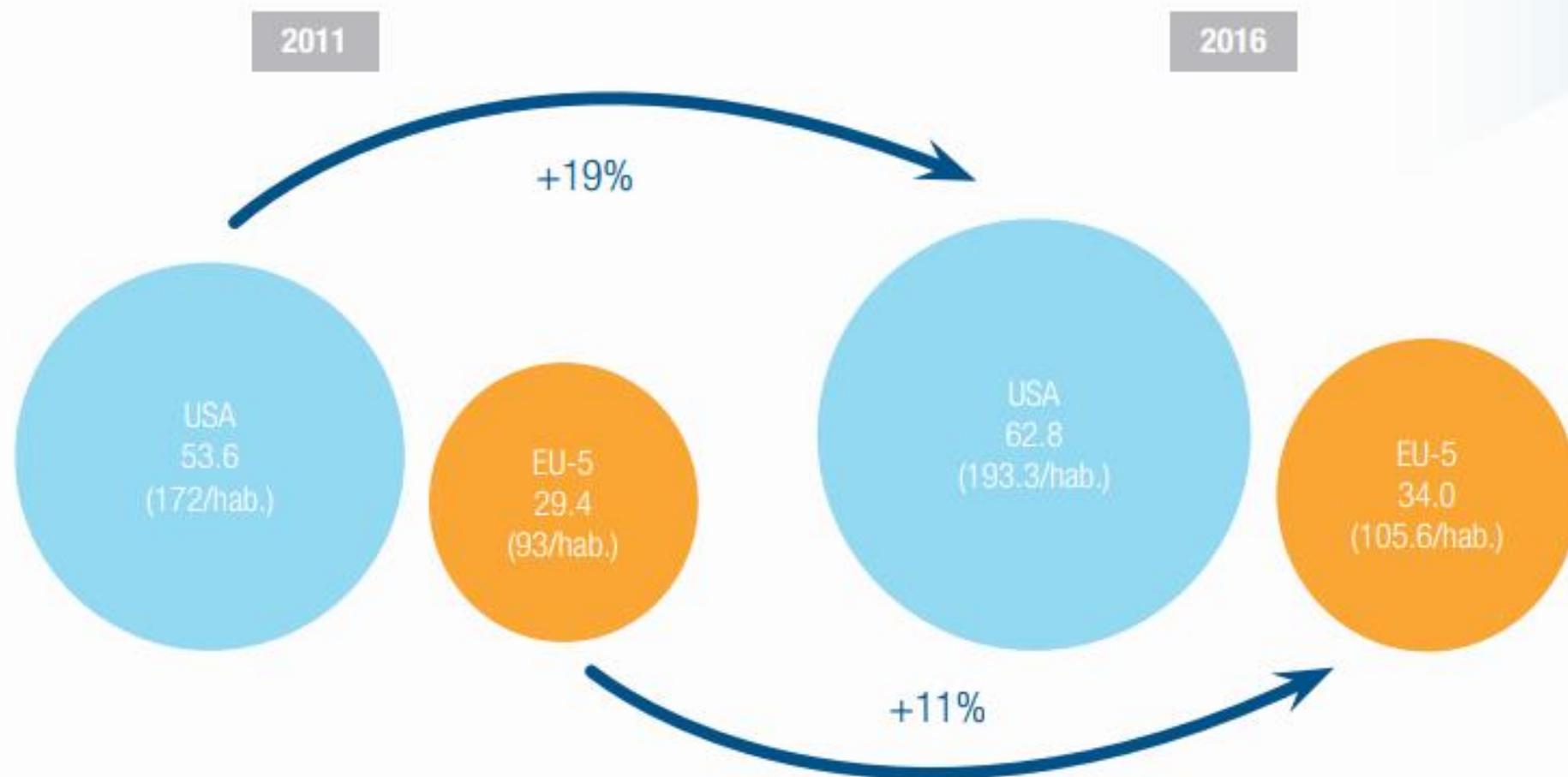
# ARPUS



Source: Company financials; Deloitte analysis.



## CapEx in the United States and the EU-5, in 2011 and 2016 (EUR bn and EUR/capita)





# **Creating the right regulatory environment**

- **The future is now....**



## **Creating the right regulatory environment**

- **Fair spectrum auctions**
- **Support investment on physical infrastructure for fixed and mobile**
- **Cost reduction / alleviating administrative burden**
- **Enable efficient network management**

A high-quality digital illustration of an astronaut in a red space suit floating in space. The astronaut is positioned in the lower right, with their right arm extended towards the left. The Earth is visible in the upper left, showing a curved horizon with blue oceans and white clouds. The background is a deep black space. The overall scene is dramatic and futuristic.

**@ETNOAssociation**

**[www.etno.eu](http://www.etno.eu)**