



RSPG Stakeholder Workshop

PEER REVIEW

CONNECTEUROPE.ORG

14th November 2025

Spectrum licensing to support network investment

01

EU digital targets

PERCENTAGE OF TARGET ACHIEVED

DIGITAL INFRASTRUCTURE

■ Latest available value ■ Difference between the values of the two most recent consecutive years



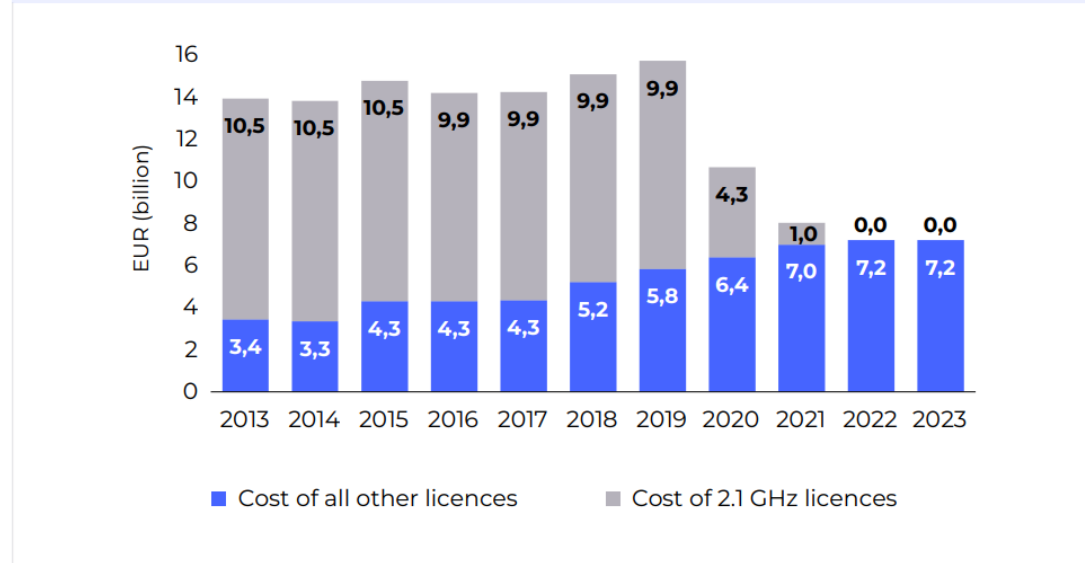
2030 TARGET

100% coverage
100% coverage
100% coverage
100% coverage

High spectrum prices

- By October 2023, European operators had spent a **total of EUR29 billion** at spectrum auctions for the principal 5G bands and about **EUR1.5 billion** more is expected from operators in the future.
- Annualised costs **still amount to around 6.5%** of the mobile revenue and has been trending upwards for several years.
- Licensing should **support investments** in very-high-capacity networks not the opposite.

FIG 4.6 : Annualised spectrum costs, European mobile operators, 2013-2024



Source: Analysys Mason, 2024

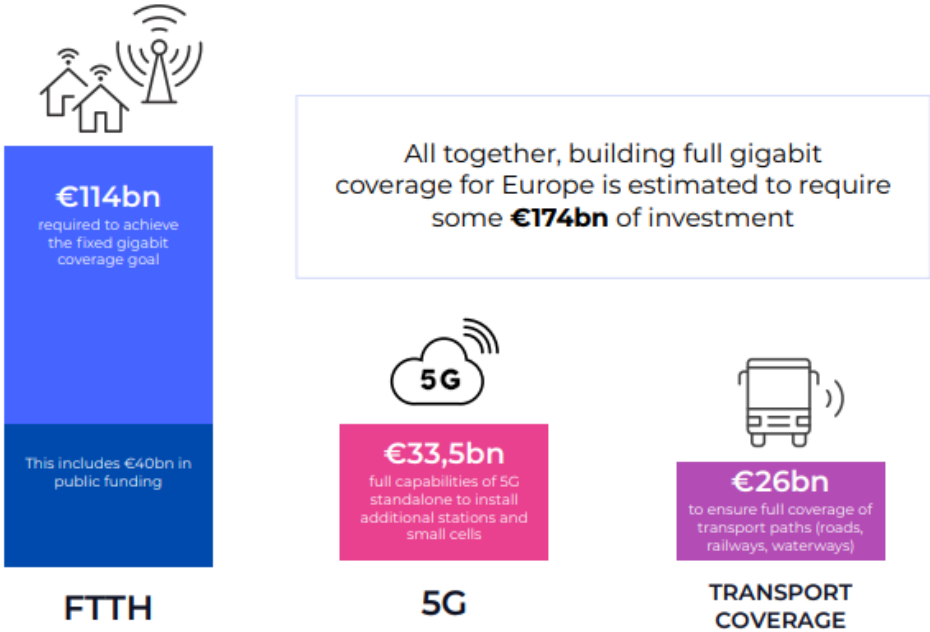
Low supply

Fixed & Mobile data consumption forecast, 2022–2030 (GB/month)



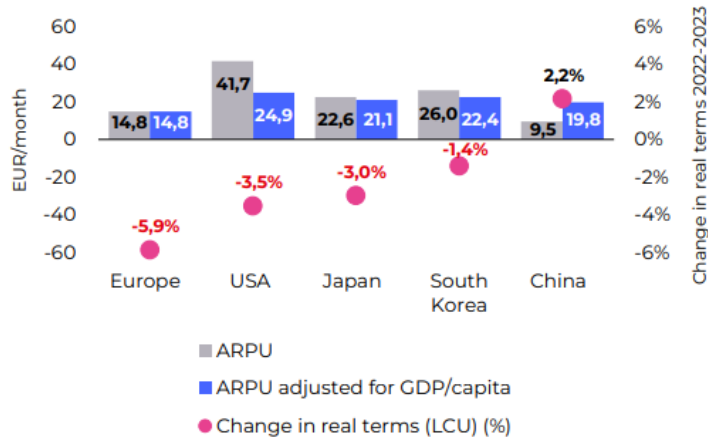
Source : Evolution of Data Growth in Europe, A.D. Little (2023)

Investment gap estimated by the EC of 174 bn euros



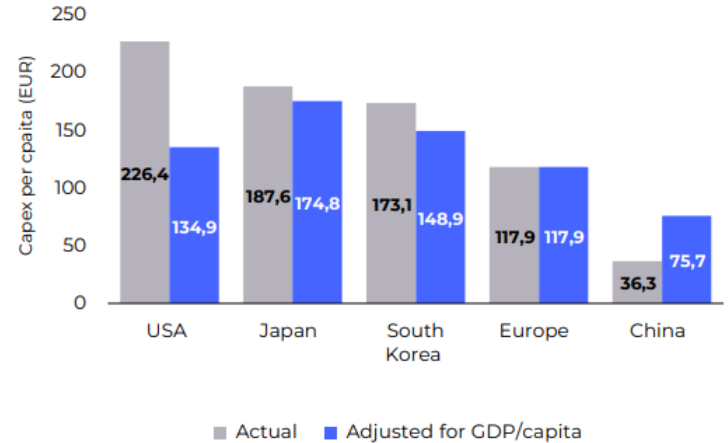
Investment capacity continues to be stretched...

FIG 1.10 : Mobile ARPU (excluding IoT SIMs), nominal and adjusted for GDP/capita (PPP), and change in real terms (LCU), Europe, USA, Japan, South Korea and China, 2023



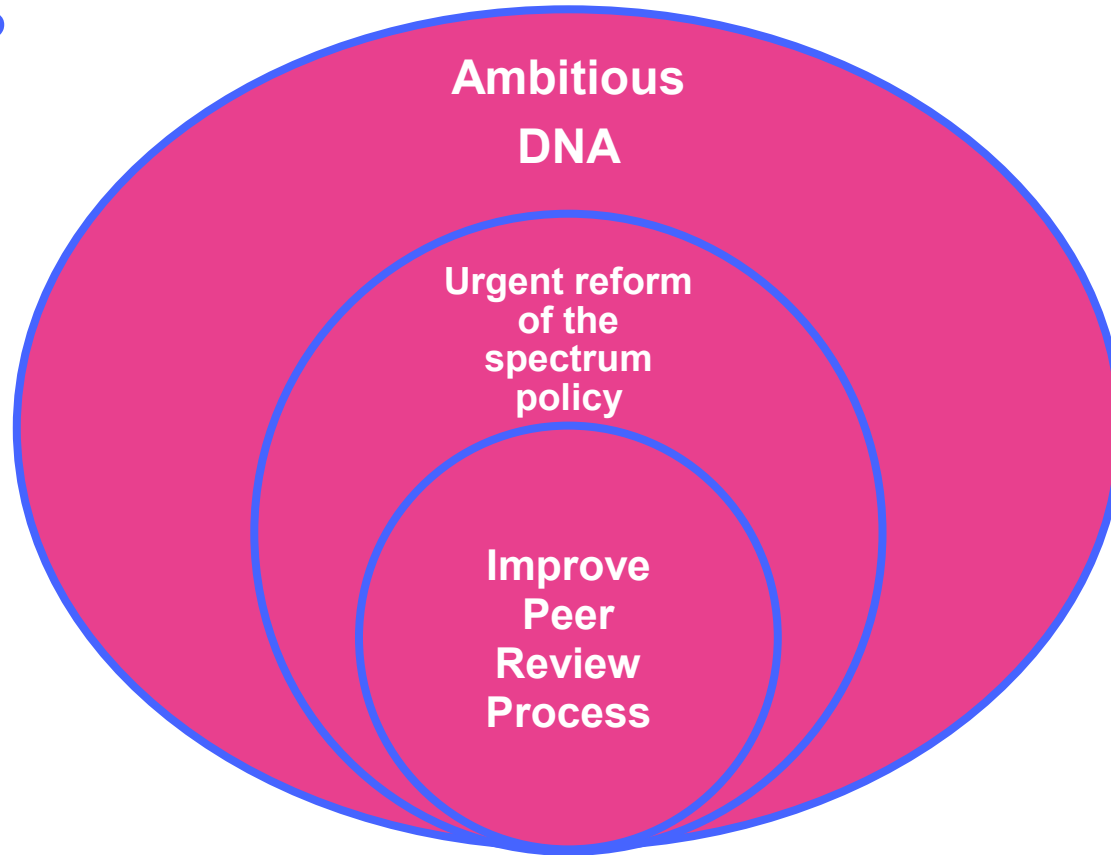
Source: Analysys Mason, 2024

FIG 1.20 : Capex per capita, China, Europe, Japan, South Korea and the USA, 2023



Source: Analysys Mason, 2024

Next step?



Issues with the current Peer Review Process

02

EECC Article 35

1. National authority **shall inform the RSPG about any draft measure** which falls within the scope of the comparative or competitive selection procedure.
2. Convene a **Peer Review Forum – if requested by national authority or exceptionally by RSPG**. The formal process and requirements for the Peer Review Forum are defined in the article, including measures e.g. promoting internal market, competition, ensuring efficient use of spectrum, and ensuring stable and predictable investments.
3. Reporting – **Annual report** published in February. The report shall indicate **experiences and best practices** noted. Reports/opinions on specific Peer Review Forum if requested by the national authority.

Scope of RSPG Peer Review activity

- From the “RSPG Work Programme 2024 and beyond”:
- With regard to harmonised spectrum, the RSPG uses the formalised processes (**Peer Review Forum**) according to Article 35 EECC.
- In addition, the exchanges based on pre-existing **workshops for past and future awards** will continue. It is to be noted that this scope of the RSPG work is somewhat larger than anticipated in Article 35 EECC.
- The Group can carry out **stakeholder workshops** that are in the scope of interest of the RSPG and are not covered by other sub-group.

Our expectations

- The Peer Review and the RSPG group should aim to ensure and spread good practices in the mobile licensing processes in the EU.
- **Already in the “notification phase” summarize and justify clearly the award goals, license conditions, and award implementation, as they are the key for the outcome of the award – and a key for supporting investment to mobile networks.**
- **Develop “check-list” for the notification.**
- Challenge and ask also difficult questions.
- Request inputs from the key stakeholders in awards, i.e. mobile operators.
- Report the achievements - how the award was improved.

Check-list: Award goals and market info

- **Summary of the market**
 - Current spectrum holdings
 - Market shares
 - Network coverage
- **Targets of the award**
 - How is the award expected to enhance mobile service?
 - Why competitive/comparative process? Was renewal/prolongation considered?
- **After the award**
 - Inform RSPG peers on outcomes and lessons learned
 - Collect statistics on key elements, e.g. reserve price, final price, limitation to supply

Check-list: License conditions

- **Coverage/rollout obligations – vs current situation**
- Why needed? Is obligation beyond the market demand and delivery?
- Expected cost, e.g. based on the number of new sites needed?
- Measures to support the investment? Voluntary rollout commitment considered?

- **Other measures/restrictions**
- Why needed? Impact to costs and rollout commitments?
- Limitations to supply, e.g. set-asides, restrictions due cross-border/incumbents.
- Other, e.g. cyber security, technology specific requirements (e.g. 5G-SA/IPv6)
- How possible market shaping measure is justified, e.g. access obligations, set-asides?

- **License costs**
- Award cost: Reserve price. How award design impacts, e.g. caps? Cost reduction against voluntary rollout commitment?
- Award payment: one-time vs annual installments
- Annual fees: administrative, other?

Check-list: Award design

- **Timeline**
- Time between final rules and registration?
- Sufficient time for participants to do valuation, prepare material for registration and for internal approval?

- **Auction format and tools**
- E.g. SMRA, Sequential... Why?
- Auction software/tool? Security?
- Bidding according to the valuation possible?
- Transparent bidding?
- “Risk-free” price driving prevented?

- **If comparative process**
- Criteria to select winners?
- How to ensure fair outcome, e.g. avoid “over-promising” participants to win?

Thank you

For your attention

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