

**BELGIAN INSTITUTE FOR POSTAL SERVICES  
AND TELECOMMUNICATIONS**

**2017-2019 Strategic Plan  
of the BIPT Council  
of 23 May 2017**

## Preamble

BIPT was created in 1991 as a semi-governmental body and was given a statute of its own in 2003 in order to guarantee its independence of the executive power.

To put it concisely, BIPT has a regulatory and control task covering a large number of areas of jurisdiction: the electronic communications market, the postal market, the electromagnetic spectrum of radio frequencies and network security. BIPT also ensures the protection of consumers in these areas. Moreover, BIPT also has jurisdiction for the radio and television broadcasting in the Brussels Capital Region.

Within each of these areas of jurisdiction BIPT has to achieve a range of objectives directly resulting from the Belgian and European regulatory framework. Regarding electronic communications for instance, one of BIPT's tasks is to foster competition, to contribute to the development of the internal market and to ensure that the consumers' interests are protected.

In order to achieve these objectives, BIPT has a number of legal instruments at its disposal: it can take decisions, impose sanctions, launch consultations and studies or act as a mediator.

Since 16 January, the BIPT Council is composed as follows: Michel Van Bellinghen, Axel Desmedt, Jack Hamande and Luc Vanfleteren.

Although BIPT is independent, the legislator has provided for numerous control mechanisms. As an independent body, BIPT is naturally accountable for its activities.

- As such, the BIPT Council draws up a three-year strategic plan. Its final version is submitted by all the Council members to the Chamber of Representatives.
- On that basis, BIPT draws up an annual operational plan tailored to the strategic plan.
- Finally, an annual report on the activities and the development of the postal services and telecommunications markets is presented to the government. The Council is heard on this subject by the Chamber of Representatives.

The Budget and Finance ministers exercise control of the draft budget made by BIPT, which, since its creation, has entirely been financed by resources mainly coming from regulated sectors, without any public subsidies.

BIPT decisions may be challenged before the Market Court. The Court may suspend BIPT decisions, annul them with retroactive effect or even replace them.

BIPT drew up its first strategic plan in 2010. The strategic plan determines the strategic axes and priority fields of activity of BIPT and contributes to the good administration of BIPT. The plan is the result of BIPT's expertise and responds to the developments within its environment.

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# 1 Introduction

BIPT, the Belgian Institute for Postal Services and Telecommunications, hereby presents its 2017-2019 strategic plan and thus meets one of its obligations to submit its functioning to democratic control<sup>1</sup>.



It is not the first time BIPT describes the strategy it intends to follow: from 1993 and during the first years of its existence, it has outlined its future activities within the framework of its annual reports. From 2003, it has drawn up half-yearly management plans and reports on the work achieved, before modernising its approach in 2005, describing its missions, areas of activity and its values in the 12<sup>th</sup> annual activity report, completing its management plans. The first strategic plan covered the years 2010 to 2013 and the second one the years 2014 to 2016.

The experience gained from drafting and implementing the first two plans, the evolution of the market and of the Belgian regulatory framework, and the partial renewal of the BIPT Council explain, among other things, the choice of actualisation and simplification within the framework of the 2017-2019 strategic plan.

The draft strategic plan was submitted for consultation on the BIPT website from 10 April 2017 to 28 April 2017. After modification of the document following this consultation, the Council finally approved the plan on 23 May 2017.

We must express our thanks to all.

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<sup>1</sup> Article 34 of the Act of 17 January 2003 on the status of the regulator of the Belgian postal and telecommunications sectors.

## 2 In consultation with our stakeholders

### 2.1 Approach

To draw up this strategic plan, the BIPT Council invited stakeholders and met many of them, such as postal and telecommunications operators, service providers, but also the representatives of the users, employees and companies, institutional players and naturally BIPT's staff. During these meetings, the parties were asked to state their expectations, visions and focus points, but also their possible reasons for satisfaction or dissatisfaction regarding the action and functioning of BIPT. The stakeholders were also invited to give their opinions on following subjects:

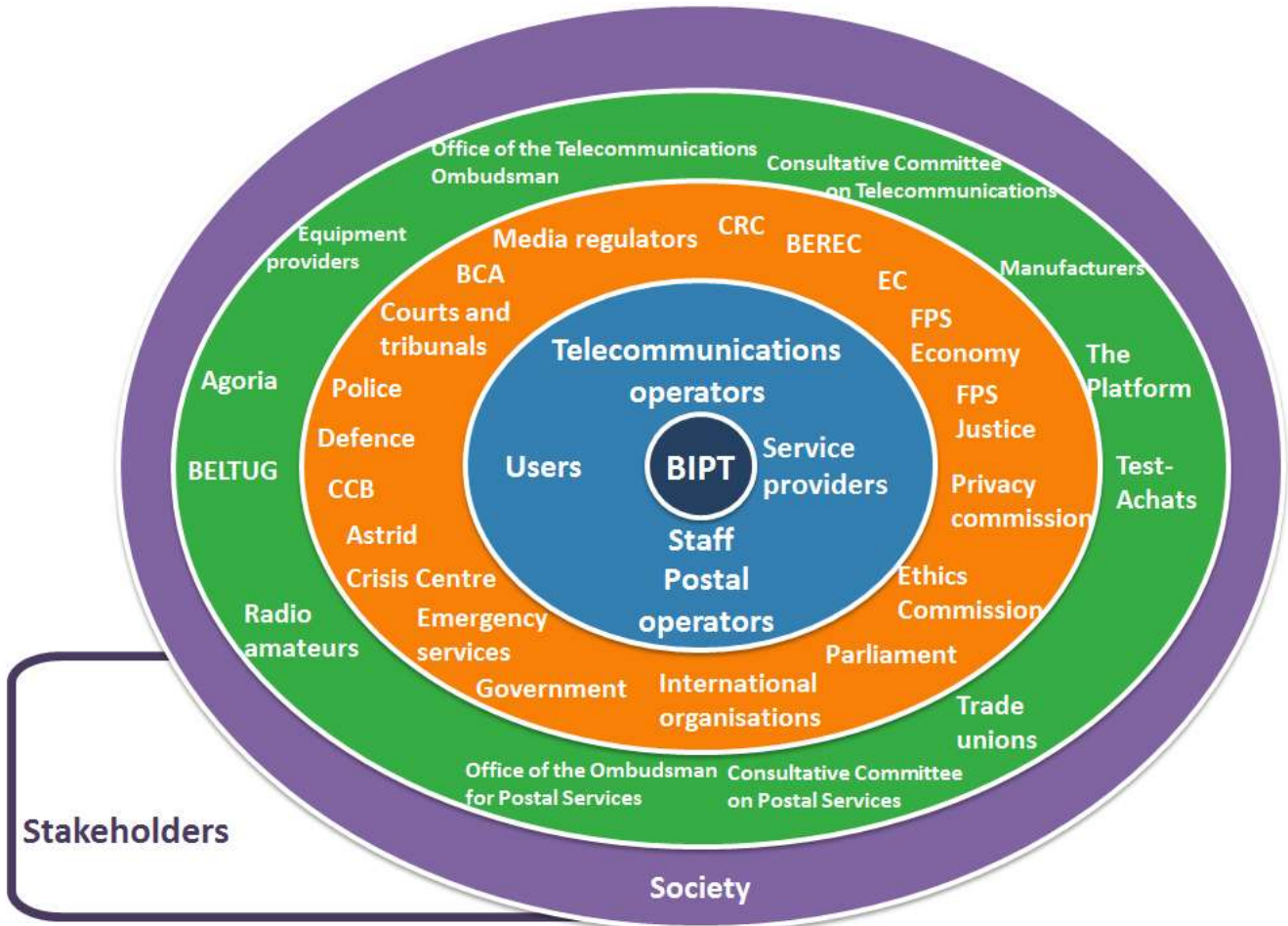
1. The future evolution of the market situation in their sector (postal services, telecoms or media) and the regulatory and control function of BIPT in this respect;
2. The role of BIPT concerning user protection;
3. The role of BIPT in managing scarce resources and network security;
4. The effectiveness and efficiency of the functioning of BIPT.

The Council wanted to start this dialogue with a 360° vision of its action, involving its staff (internal vision) and the stakeholders (external vision) in the process.

In order to report the results of these dialogues with more transparency, you will find an overview of our stakeholders, the PEST analysis and the SWOT analysis hereinafter. These are not exhaustive.

## 2.2 Overview of the stakeholders

Consulting and dialoguing with the stakeholders is essential for a socially responsible organisation. It is then imperative to listen to the stakeholders and involve them in the organisation. Taking all the stakeholders into account and identifying their preoccupations represents the main preoccupations of an organisation wishing to dedicate itself to its social responsibility.



## 2.3 PEST

A PEST analysis is a model aiming to list the Political, Economic, Social and Technological factors influencing the organisation at a macro-environmental level. By identifying the evolutions inside these four factors, this analysis contributes to a greater understanding of the environment and allows to obtain an overall view during the drafting of the strategic plan.

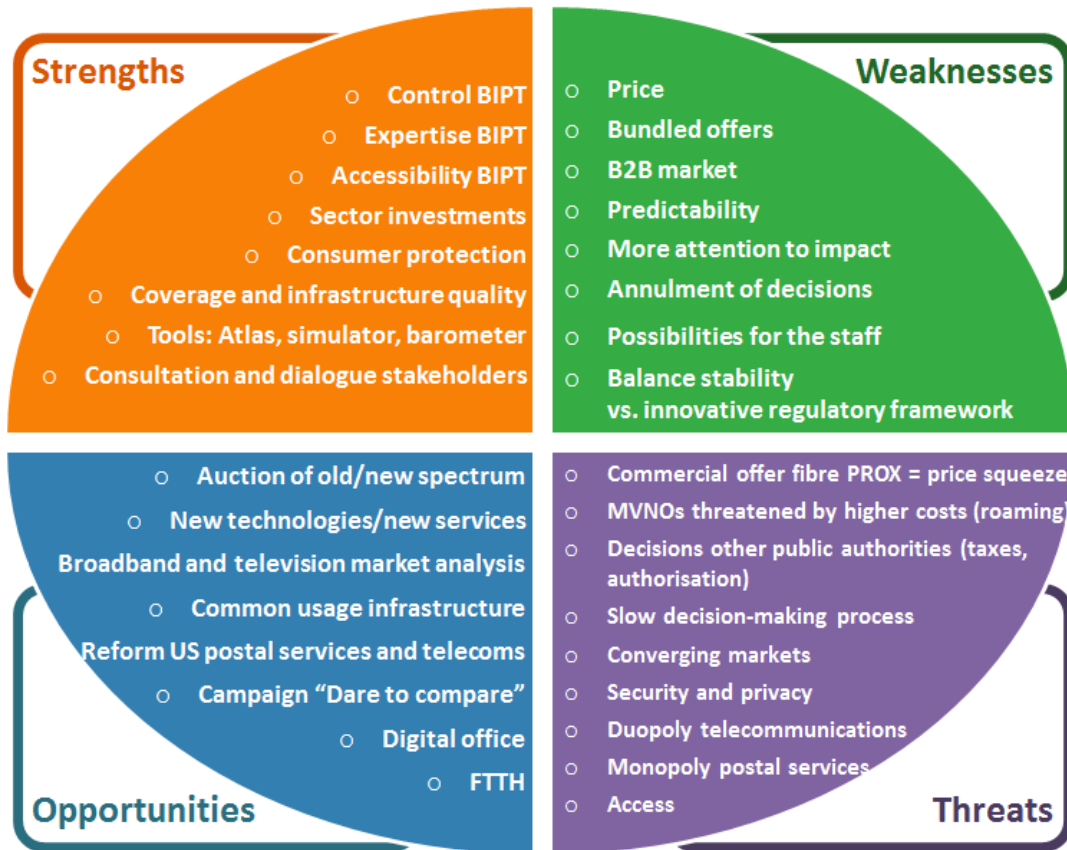
This PEST analysis was made on the basis of the stakeholders' contributions. The content does not necessarily reflect BIPT's opinion.

<b>Political</b> <ul style="list-style-type: none"><li>• Digital objective: Belgium in the European top 3</li><li>• Security and privacy: important status in the political agenda</li><li>• Modifications of the European framework for telecommunications</li><li>• Sector demand for a maximum harmonisation of the EU</li><li>• Higher protection of consumers</li><li>• Modification of the Belgian postal framework</li><li>• Actions of spectrum (5G)</li><li>• Efficiency and impact of consumer protection measures</li><li>• Sectors with high level of complexity</li><li>• Defend long-term actions compared to sometimes short-term political interest</li></ul>	<b>Economical</b> <ul style="list-style-type: none"><li>• Maximise the deployment chances of networks and services</li><li>• Maximise the opening up of the market for the alternative operators</li><li>• Maintain a sustainable competitive environment</li></ul> <i>More specifically:</i> <ul style="list-style-type: none"><li>• Further development of the opening up of cable and FTTH</li><li>• Demand for a break in legislation for investments in fibre and <i>statu quo</i> of cable regulation</li><li>• Risk of enlargement of the duopoly towards mobile due to bundles</li><li>• Demand for a stable and predictable regulation</li><li>• Convergence</li><li>• Parcels/express mail: risk of weakening of the dynamic parcel market</li><li>• Decrease in the letter post volume due to e-substitution and the growth of digital media</li><li>• Products evolution: e.g. electronic registered item</li><li>• Reasonable tariffs and sufficient choice</li></ul>
<b>Social</b> <ul style="list-style-type: none"><li>• Demand to pay more attention to the B2B market</li><li>• Comparison of prices, quality and coverage: analysing the balance, necessity and impact</li><li>• Coverage everywhere and every time: <i>Quid</i> white spots and inside buildings</li><li>• Find the balance between the strict interpretation of the obligations and the operational costs (operators)</li><li>• Postal services that are affordable, of a good quality and in close proximity</li><li>• Affordable telecommunications tariffs (bundles included)</li><li>• Importance of privacy and security</li></ul>	<b>Technological</b> <ul style="list-style-type: none"><li>• 5G: offer spectrum in time</li><li>• Network sharing – co-investment</li><li>• Regulation of OTTs</li><li>• Network neutrality</li><li>• Promoting fast evolutions of new technologies</li><li>• Expertise and knowledge: e.g. in terms of security</li><li>• Being pragmatic regarding the new obligations</li></ul>

## 2.4 SWOT

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. The strengths and weaknesses analysis does not only focus on the organisation as such, but also on the expected evolution of the postal and electronic communications markets.

This SWOT analysis was made on the basis of the stakeholders' contributions. The content does not necessarily reflect BIPT's opinion.

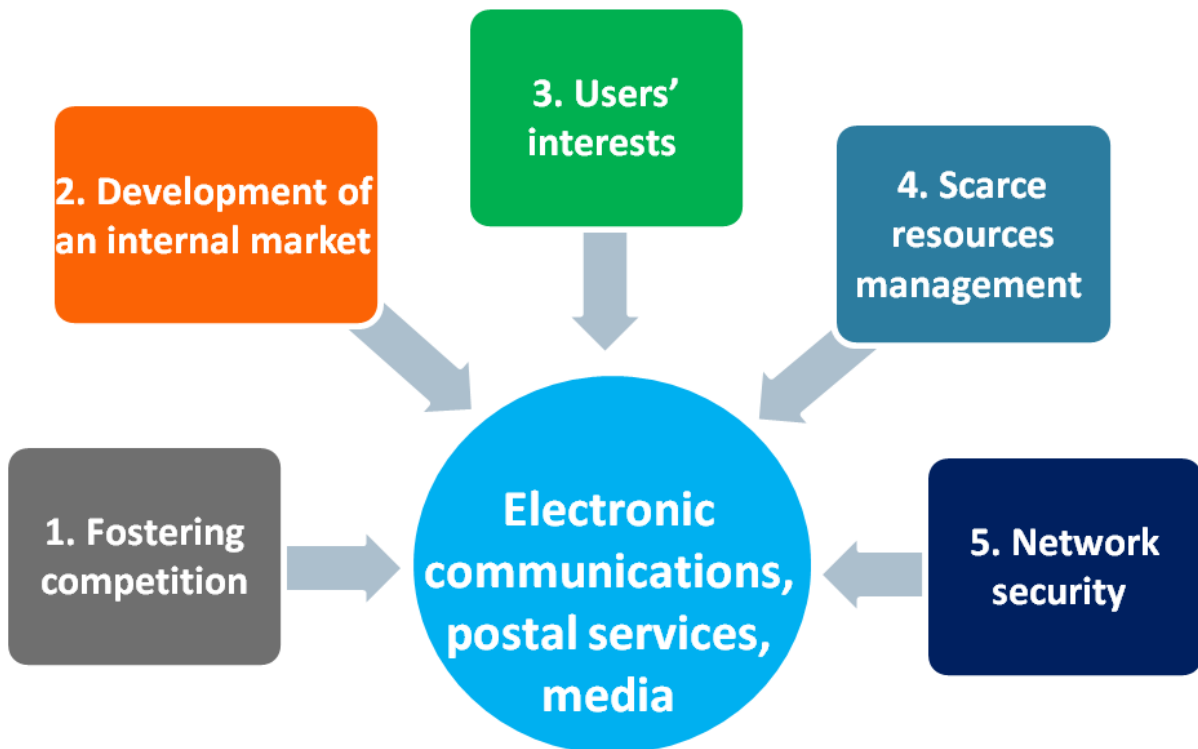


### 3 Our missions

An organisation's mission gives this organisation its *raison d'être* through the goal it seeks to achieve. It provides a framework for the strategy as well as for the operational functioning. The mission allows to verify if a specific action or an evolution of the organisation in one direction or the other does not go the wrong way.

The formulation of our mission is all the more important since BIPT, as a regulator, serves society and the sectors it regulates. Defining correctly BIPT's mission is to determine its added value to society.

The law, which defines this mission, helps it in this respect.



Electronic communications, postal services and media in the Brussels-Capital Region are BIPT's main fields of activity. For each of them, the regulatory action of BIPT is based on five basic principles:

1. fostering healthy competition and maintaining market access;
2. contributing to the development of an internal market of efficient networks and services;
3. protecting the users' interests while taking account of social inclusion, a high level of protection, clear information and transparency;
4. managing scarce resources such as radio frequencies and numbering resources;
5. ensuring network security.

BIPT is not necessarily the only regulatory authority regarding these matters and will constructively consult, if necessary and desirable, with the authorities whose competences are close to those of BIPT or shared with the latter.

## 3.1 Fostering competition

### Context

#### **Telecommunications**

In the fixed telecommunications market, competition on services started to increase mainly after the opening of the historical operators' networks (phone and cable). As a result, Orange sold (spring 2016) a fixed broadband and television offer to individuals. Moreover, the cable operator Telenet bought the mobile operator Base. We have noticed a new general trend towards bundling (fixed and mobile) services, on the residential as well as on the non-residential market, and an evolution towards more integrated operators. Due to the takeover, the number of players on the mobile market has decreased from four major operators to three, where two also own a fixed network.

We have also noticed the progression of new forms of competition, such as certain over-the-top services (OTT), e.g. Skype.

Moreover, Proximus announced investments of about 3 billion EUR in the optical fibre roll-out, what will significantly increase the penetration of super-fast Internet in Belgium. In 2014, the cable operator Telenet had already announced major investments in its network to allow "giga" speeds. The three mobile telephony operators with their own networks have made massive investments in recent years towards a quick roll-out of 4G.

#### **Postal services**

The postal market has always had a dual nature. On the one hand, there is the letter post segment which, even after the market liberalisation and the emergence of TBC Post, is still totally dominated by the universal service provider, bpost. Despite the drop in volumes, the letter post segment still represents more than half of the postal sector revenue. In the future, this segment will be under further pressure from digital substitutes, such as registered electronic mail.

On the other hand, the parcel and express mail segment shows a massive increase, both in terms of volumes and turnover. This growing segment attracts numerous providers from neighbouring countries, such as the international integrators (UPS, DHL, Fedex and TNT) and major postal companies (PostNL, GLS, DPD, etc.). We have also noticed an increase in the number of service points of alternative operators and the arrival of innovations such as permanently accessible automated parcel machines. Companies such as ParcelHome or Bring Me even offer parcel machines for home or your work place.

Regarding the provision of networks or services, healthy competition is a crucial means to reach the social well-being objective, which can be offered by electronic communications and postal services. It also benefits the economic development. BIPT monitors the development of competition based on quality, price or innovation in the electronic communications, postal services and media sectors. The regulation of competition in the media market is carried out in close cooperation with the media regulators of the communities.

Since the opening up of markets, BIPT protects the interests of the historical operator and of its competitors, whether they are recent or new entrants on the market, and endeavours to create a favourable environment for operators who provide services. Each must benefit from a level playing field.

Besides guaranteeing market access and correcting the imperfections of that market, BIPT, through its actions, fosters investments and promotes sustainable competition, taking account of the sector viability.

Due to the increased convergence in the telecommunications sector, it is possible that a duopoly between the major network operators (Proximus and Telenet in the north of the country, and Proximus and VOO in the south) emerges. BIPT ensures that there are enough possibilities for other telecommunications providers to durably enter the market and offer a competitive price and quality.

## 3.2 Development of the European internal market

### Context

#### **Telecommunications**

The need for ever more bandwidth will continue to require significant investments in broadband electronic communications networks throughout Europe. OTTs are the fastest growing services. This growth represents a challenge for the traditional telecommunications operators. These services are also at the basis of numerous innovations enjoyed by users. The increasing digitalisation will also lead to a massive increase in what is called the “Internet of Things” (IoT).

The existence of various regulations of different types (administrative, financial) within the Member States may lead to additional access barriers for both existing and new operators and/or a slower development of new services. An efficient harmonisation of the regulation at the European level should ensure a more accomplished digital single market.

In the future, a trend may emerge in a number of markets (such as Belgium) towards more oligopolistic and duopolistic markets. These new trends and challenges confirm the necessity of the planned review of the European regulatory framework in order to continue to support the sustainable development of the internal market.

#### **Postal services**

There is ever-increasing pressure on historical operators to transform their classic letter post activities in other activities, mainly associated with parcels, but without affecting their universal service obligations related to letter post. Contrary to the electronic communications market, letter post represents a highly concentrated market, and only a few European postal markets include real alternative letter post operators.

In Belgium, the legal framework (notably the licence terms for distributing correspondence) significantly slowed down the full liberalisation of the postal sector, which led the universal service provider on the letter post segment to appropriate almost 100% of the market. However, we also notice that digitalisation initiatives, such as e-government, can have a significant impact on the letter post market.

These European trends are also observed at a global level. However, from a European perspective, we notice that the European postal operators perform quite well at the global level, as most of the European historical postal companies have undergone major transformation, which has not been the case in other parts of the globe, such as in America or Japan. bpost's results were exceptionally good, as it is the most profitable postal operator (and universal service provider) in Europe. Concerning universal service, profitability was also excellent.

In order to participate in the development of a European internal market of electronic communications services and networks, on the one hand, and of postal services, on the other hand, BIPT's main task at the international level is to cooperate with other Member States and, if need be, with other media regulators in order to ensure a consistent application of the regulatory framework for postal services and electronic communications. BIPT's representation and activities inside BEREC and the ERGP play a very important role in this matter.

### 3.3 Users' interests

#### Context

##### **Telecommunications**

The Digital Agenda 2020 is the cornerstone of the European Union regarding electronic communications, in order to appear as an important entity within the framework of global competition. The objective of the agenda is to offer access to broadband services to all. This access for all to broadband networks gives hope for bigger markets that are more favourable for the development of innovative services for all categories of users.

Apart from continuing the development of the right price comparison instruments, BIPT launched tools in 2015-2016 allowing users to also compare the quality and coverage of each operator. BIPT continued its work to allow users to know and control their consumption costs related to telecommunications, more specifically the data and mobile services, and to switch operator more easily.

Concerning social inclusion, BIPT drafted a proposal to update the regulatory framework and to adapt it to the present needs of society and to the recent court decisions.

In some rural areas, there were complaints regarding the lack of efficient services. This leads to the conclusion that the nearly nationwide coverage in Belgium is still not a reality for some citizens.

##### **Postal services**

The number of complaints submitted to the office of the Ombudsman for the postal sector has been increasing in recent years, notably following the increase in the proportion of parcel services. The quality of priority single-piece letter post items measured via delivery times is decreasing and dropped for the first time in 2015 below the legal quality standard.

Studies led by BIPT show that users are open to a more innovative and modern fulfilment of postal applications (including universal service), but the modifications of the inclusivity of the universal postal service have met some resistance.

The users are private consumers, but also non-residential users and companies, public institutions and legal persons in general. The profiles of these users vary substantially and may lead the companies BIPT must regulate to establish contradictory strategies.

Protecting the user's interests is an important mission that must be highlighted for BIPT. Although the availability of high-quality postal and electronic communications services at a competitive price is crucial for individual consumers, this cannot eclipse the critical importance to offer them the possibility to access available innovative technologies and services on all networks and to rise to the corresponding challenges, such as the protection of privacy or compatibility with their equipment.

Tariff transparency, easy tariff comparison and clear contract terms are key elements to the protection sought by the consumer during his contacts with his provider. During the 2017-2019 period, BIPT will continue to ensure that big and small operators respect the rules in this context. The Institute will focus on the implementation of the provisions favourable to the consumers and will intervene each time the interest of the majority is threatened.

The non-residential consumers' needs, especially regarding quality, performance, price and innovation, remain at the core of BIPT's efforts. These intensive users of electronic communications or postal services rely on these aspects to secure a competitive position, among other things. This does not only concern companies, but also those who must have access to wholesale services or parts of the network in order to offer their own services once these are developed.

BIPT ensures that the provisions regarding the universal service and social tariffs are implemented and adopted by operators. It is in the sector of electronic communications as in the postal sector that the concept of universal service could develop in a context of liberalisation at a European level. BIPT ensures that users

of electronic communications and postal services receive such services at a price affordable for all, but also covering the providers' costs.

An analysis of the white spots in terms of telecommunications, where no quality service is available, has been launched. This analysis will lead to proposals which, when implemented, will allow all the users, irrespective of her place of residence, to use the innovative services referred to in the Digital Agenda 2020 at an affordable price.

### 3.4 Scarce resources management

#### *Context*

The spectrum and numbering policy is constantly being improved in order to adapt it to the quick developments of new services and new applications (OTT, IoT, 5G, etc.).

Concerning numbers, we simultaneously notice a decrease in the appropriateness of the use of information regarding services and the tariff of a number, and the emergence of new roles such as the authentication, identification and authorisation of users, even for applications that are not linked with telecommunications. We notice as well for some applications (e.g. IoT) a decrease in the importance of national borders, so that the numbering strategy must be addressed at an international level (multiple jurisdictions problematic). Virtualisation leads to the disappearance of physical demarcation points on the networks.

The demand for frequencies may rapidly grow in the future. Mobile applications require always more bandwidth, which will have an impact on the total demand for frequencies. The emergence of 5G is an important factor to take into account.

Frequencies and numbers are only available in limited quantity. An efficient use of these scarce resources is crucial to ensure fair competition and to allow innovation.

BIPT is tasked with managing the national numbering plan and the granting and withdrawal of number user rights.

The Institute manages the radio spectrum, the national and international coordination of frequencies and controls the use of these frequencies, including the respect of the coverage obligations. BIPT also fulfils the role of wave policy to put an end to any form of harmful interference. Concerning radio frequencies, BIPT's strategy is, among other things, to offer on time to the market frequency bands that are harmonised at the European level.

Finally, BIPT is actively engaged in international expert groups concerned with the rational use of frequencies and numbers (RSPG, CEPT, etc.) within the framework of new applications and technologies. There is cooperation with the national administrations concerned to ensure a harmonious arbitration of the use of frequencies between broadcasting and mobile services.

## 3.5 Network security

### *Context*

The integrity and the security of electronic communications networks available to the public are a growing concern. For this purpose, BIPT collaborates with the operators in order to be able to act quickly in case of potential incidents.

The terrorist attacks of March 2016 underlined the importance of secure and reliable services and electronic communications networks. Following these events, BIPT took several initiatives. The potential introduction of the prioritisation of certain phone numbers in emergency situations has thus been analysed. Registration of prepaid mobile cards users has been prescribed. The drafting of a first sectoral crisis plan for telecommunications has also been launched. Moreover, an extra frequency capacity has rapidly been provided to the limited company ASTRID. The mobile operators carried out a configuration of their networks in order to limit the impact of an overload.

Finally, the consequences of a potential power cut on the functioning of telecommunications have been analysed.

With its “Network Security” Department, BIPT will keep on monitoring the security of public electronic communications networks and publicly available electronic communications services. BIPT will ensure that electronic communications operators take the necessary security measures to guarantee the integrity and accessibility of their networks and services and that it is notified of security incidents. BIPT collaborates with the CCB (Centre for Cybersecurity Belgium), the services of police and justice, and with the intelligence and security services. BIPT is also working closely with other federal services responsible for the security of citizens, such as Justice, Security and Home affairs. BIPT also plays the role of expert regarding telecommunications applications that are interesting for emergency and rescue services.

## 4 Our vision

An organisation's mission allows this organisation to define its *raison d'être*. It also describes an ambitious picture of the future.

When drafting the current strategic plan, we chose to modify the existing version, so that its content can be conveyed in the most simple and efficient manner by its main ambassadors, i.e. its staff.

BIPT expresses as follows what it wishes to be and defend regarding electronic communications, media and postal services:

***We guarantee that the user has a choice  
of high-performing and trustworthy communications  
at the best possible terms and conditions  
in a competitive environment.***

**High-performing communications:**

BIPT welcomes and supports investments in all (postal, electronic communications) networks, innovative services and technologies aiming to allow users to have access to high-quality services at competitive prices in our country.

**Trustworthy communications:**

Each communication between users must be trustworthy for them, including in terms of protection of each user's privacy. BIPT also controls the reliability of information provided to users by the operators.

**At the best possible terms and conditions:**

BIPT also ensures that services are offered at affordable and competitive prices, with a high quality, and that they are available and accessible to all.

**Competitive environment:**

In a liberalised market of electronic communications and postal services, BIPT wishes users to benefit from various infrastructures and a wide choice of services and products providers. BIPT is convinced that a sustainable competitive landscape increases investments in advanced and innovative services and technologies. BIPT also wishes to promote the creation of such landscape via a regulatory framework.

## 5 Our values

The values of an organisation are essential so that everyone can recognise himself or herself in the actions taken by the organisation to accomplish its mission and implement its vision. Thanks to the values of an organisation, everyone, including its staff, its customers and its providers, can each day make certain that all actions it takes comply with its mission and vision. Sharing these values is essential to fulfilling them.

Here again, simplification was chosen, while keeping the essential.

The chosen values are the following: independence, reliability and transparency.



### **Independence**

A critical attitude towards all stakeholders is part of BIPT's DNA. The regulator's independence ensures its credibility towards the market players it regulates as well as all stakeholders. This brings it to defend positions that are sometimes antinomic. Independence enables stakeholders to deal with a regulator whose actions are stable and predictable without losing sight of the necessity to adapt to the market situation which can sometimes be changing, due to its nature.

This independence can also lead to a critical attitude towards external pressure and an ongoing questioning of its actions, their effect and the perception it creates. It is also reflected in the ethical behaviour and the sense of responsibility of the staff, which must make critical thinking a habit.

BIPT must ensure it can keep its independence. To this end, the specific status and the financial autonomy represent the best guarantees so that BIPT can carry out its mission efficiently in total independence.

### **Reliability**

As an expertise centre, BIPT wishes, when adopting a position, to be a reliable and competent partner for all stakeholders.

This reliability is supported on the inside by the professionalism, teamwork and agility of BIPT. The professionalism promoted by BIPT is meant to be multidisciplinary and combines technical, economic and legal expertise in the field of electronic communications, postal services and media.

BIPT seeks to react quickly and with agility to the situations that arise and to the often very fast technical and economic evolutions on the market; its employees' flexibility and internal and external collaboration are essential. BIPT adapts its structures and its working method whenever necessary. Although BIPT is

composed of departments, the priority is given to a project based collaboration that is as transversal as necessary between the departments, where a result-based management is a priority.

### **Transparency**

Transparency is an important element that guarantees control over BIPT's action. Transparency is obtained via openness and visibility, both internally and externally, on the one hand, and dialogue and accessibility, on the other hand. Transparency also comes from the fact that all acts and decisions are appropriately motivated and are previously submitted for consultation as often as possible. Transparency and openness must be really close to an efficient and firm decision-making, allowing to intervene in a timely manner where necessary.

## 6 Our strategic axes

The first BIPT strategic plan 2010-2013 was composed of 8 strategic axes, the second plan 2014-2016 included 7. For the drawing-up of the third plan, we have chosen, after analysing the previous plan, to keep on simplifying and clarify this structure. We have chosen to gather the strategic objectives in three strategic axes covering the external projects. A fourth axis includes internal projects aimed at improving BIPT's functioning and making it more efficient.



## 6.1 1<sup>st</sup> strategic axis: Competition



### 6.1.1 Promoting sustainable competition and investments

Despite the presence of two high-performing fixed networks, competition in the broadband and TV residential markets (including the bundling of both with other services) is still liable to improvement. To that end, BIPT must properly assess the risks arising from the current market concentration and to limit its negative effects as much as possible. The regulator will strive to find the right balance between promoting investments (network quality and innovation) and promoting sustainable competition to the final users' benefit (access, price and quality of telecommunications services).

In this market, we can only speak of a long term sustainable competition when at least a third player can successfully emerge and, such as the historical operator and the cable operators, can fully rely on investments in its own network infrastructure. In this perspective, it is crucial for BIPT to define a predictable regulatory environment in order to promote investments in optical fibre and the future generation of cable networks in a sustainable competitive landscape. Research will be conducted in that context in order to know if co-investing in networks can lead to potential easing of the current regulation.

Particular attention must be paid to networks coverage, not only in densely populated areas, but also in white or grey spots, where coverage must significantly be improved. It is important to better address, efficiently, the need for information of potential operators and investors in order to facilitate market entry.

As an expert, BIPT will carry out an analysis of all the policy areas to identify the potential obstacles/barriers to investing in networks and will verify how to shorten investment lead times as much as possible.

The non-residential market is also characterised by a lack of competitiveness. The specific problems of the segment will be the subject of specific market analyses and remedies, which will address the leased lines and the general broadband products. At first, the deployment of one's own infrastructure will be encouraged if it is defensible from an economic perspective, without however jeopardising the alternative operators' need to have a range of homogeneous wholesale services in order to be able to optimally serve their end-customers, often located in various places, and to encourage them to switch operator. Moreover, the implementation of obligations will be closely followed up and BIPT will diligently examine the complaints from alternative operators in this market.

BIPT will continue to developing its postal observatory in order to have comprehensive and reliable data on the characteristics of the postal market to promote its growth.

BIPT will support all sustainable competition in the postal market if it benefits users. In this respect, it is important to note that legal barriers can be significant obstacles in the sector. Therefore, BIPT will continue to work within the framework of its advisory powers towards a legal framework creating a true level playing field between the different market players, regardless of their ownership structure. BIPT will also see to the implementation of the regulation of the European Union on cross-border parcel delivery services which aims to optimise transparency, in a proportionate and non-discriminatory manner, for consumers.

### 6.1.2 Spurring innovation

While ensuring the protection of promulgated measures, BIPT will ensure that there are no obstacles to successful operation of the market, and more precisely to the marketing of innovative services. BIPT closely follows the evolution of networks and technologies and will always welcome improvements that benefit the sector (and by extension the market), even if they imply the progressive elimination of obsolete practices and technologies.

BIPT seeks to anticipate new services and consumers' preferences, such as the growing importance of over-the-top (OTT) services. BIPT will be attentive to the consistency of its regulatory approach between these new services and existing telecommunications products offered by traditional operators. BIPT will expand the collection of statistical data on OTT services in order to be able to assess its extent correctly.

Just as the optical fibre and the future generation of cable networks represent a considerable improvement in the fixed broadband market, the coming of 5G will cause a revolution in the mobile broadband market.

BIPT supports innovations in the postal market which may represent an advantage for users, such as new physical letter boxes, the e-box or applications for hybrid mail.

## 6.2 2<sup>nd</sup> strategic axis: Users



### 6.2.1 Contributing to providing transparent information to consumers and promoting social inclusion

BIPT wishes to remain the reference regarding optimal information provision to users concerning all the important information regarding electronic communications and postal services. It will ensure that the information the operators are legally obliged to provide is accessible and understandable for the postal services and electronic communications users. Via its website, BIPT will provide additional information on practical questions users are asking themselves.

Regarding electronic communications, BIPT will publish comparable information on the operators' customary rates, via a renewal of the tariff simulator, and national and international tariff comparisons. The Institute will also provide comparable information on the quality of the provided service, via the quality barometer, and on the presence of the different networks via an update of the coverage maps. BIPT will endeavour to make this information essential to the users known to the general public, so that everyone can make an informed choice regarding the most appropriate operator.

Regarding postal services, BIPT will continue its efforts towards a greater transparency of the service quality and in order to facilitate comparison of prices. BIPT will also control the respect of the regulatory framework by every postal operator. BIPT will continue to monitor the consumers' needs concerning postal services with a view to modernising the universal service. Moreover, BIPT will monitor the quality of postal services and customer satisfaction.

A further automation of the granting of social tariffs regarding electronic communications needs to be carried out. The works improving the accessibility of electronic communications services for disabled users must continue. BIPT will search possible solutions for areas, mainly rural, with a lower coverage, so that everyone can benefit from high-performing services, in accordance with the Digital Agenda 2020.

### 6.2.2 Ensuring a reliable environment

With its "Network Security" Department, BIPT will keep on monitoring the security of public electronic communications networks and publicly available electronic communications services. BIPT will continue to ensure that operators take security measures ensuring the integrity and availability of their networks and services (notably concerning the accessibility of emergency services). BIPT will also continue to investigate the security incidents notified by operators.

The sectoral crisis plan for the electronic communications sector will continue to be updated in cooperation with the operators concerned, especially concerning the crisis response measures which have been inventoried.

As an appointed inspection service, BIPT will carry out controls regarding the respect of the legal provisions on critical infrastructures for the electronic communications sector. BIPT's monitoring departments will, among other things, see to the right use of radio spectrum and the operators' network coverage.

BIPT will also continue its close cooperation notably with the emergency services, the crisis centre, the CCB (Centre for Cybersecurity Belgium), the Justice and Internal Affairs services, in order to provide secure and reliable electronic communications networks.

## 6.3 3<sup>rd</sup> strategic axis: Scarce resources



### 6.3.1 Managing scarce resources

BIPT wishes to play a leading role in the provision of the 3400-3800 MHz band, designated in Europe as the primary band for the 5G deployment. Moreover, BIPT will also give priority to the organisation of auctions of the frequencies of the existing mobile licences for 2G and 3G, for the use of new technologies. Finally, the Institute will organise the auctions of licences for the 700 MHz and 1400 MHz frequency bands.

The use of traditional phone numbers will undergo profound changes in the years to come, due to the increase in machine-to-machine applications, new roles such as the single authentication and the user authorisation, and the use in an extraterritorial context. The numbering plans must consequently be evaluated and adapted in order to take account of evolutions, without affecting a management repressing potential improper use of numbers. To this end, BIPT will actively cooperate with all the other regulatory authorities in Europe and in the ITU for the greatest possible rapprochement of the political approach to numbering.

## 6.4 4<sup>th</sup> strategic axis: Efficient functioning



### 6.4.1 An accessible functioning

With the publication of the three-yearly strategic plan, the operational plans and the annual reports, BIPT ensures the transparency of its objectives, realisations, financing and results. Each day, BIPT will continue to communicate transparently with the press concerning important events. BIPT will endeavour to make its functioning better known to the general public, notably by using social media more actively and continuing the adaptation of its website which will be more accessible.

BIPT wishes to continue intensifying the dialogue with its stakeholders in order to build an efficient regulation. At the European and international level, BIPT intends to play an active role in the development of regulations and to continue its important role of expert within international organisations for postal services and telecommunications.

BIPT will improve, extend and integrate its existing electronic counters in the form of a single electronic counter. The purpose is that the customer can access files that concern him/her, while respecting confidentiality, and that invoices can be consulted in full. Complete applications and payments can be processed via the electronic counter. The automatic processing of certain types of files will thus become a reality.

### 6.4.2 Being an attractive employer

Concerning digitalisation, organisation management and internal control, BIPT continues its efforts akin to what will be launched at the federal level in order to create a modern and efficient working environment. BIPT will take new steps towards modernising its HR policy within the defined framework and will keep on providing training according to the needs of its departments and individual employees.

## 7 Our evaluation

BIPT carries out a periodic evaluation of the operational objectives and of the projects of the annual operational plan. This evaluation takes place via a follow-up of the projects key performance indicators. A presentation of this evaluation is analysed on a quarterly basis with the different stakeholders. These evaluations of the operational plan are expressed per operational objective in BIPT's annual report.

Within the framework of the drawing up of the various projects of the annual operational plan, a preliminary impact analysis has been planned, if possible.

BIPT will assess on a case-by-case basis the events in the markets resulting from a decision taken by BIPT.

BIPT will take into account the fact that these results will also be influenced by the evolution of the environment, the expectations of the users and service providers, the markets and the European agenda.