

GIGAEUROPE'S MISSION

GIGAEurope is the industry association representing private operators who build, operate and invest in gigabit communications networks. GIGAEurope's mission is to highlight the importance of gigabit connectivity for EU digital and green policies, and to support private sustainable investment and competition. Our purpose is to become a trusted and strong voice of the gigabit connectivity industry, a true partner to policymakers and stakeholders in the digital ecosystem.

GIGAEurope members collectively provide connectivity services to over 40 million fixed broadband customers and 130 million mobile customers throughout Europe.

Built on the foundations of Cable Europe (active since 1955), the transition to GIGAEurope came naturally through the technological advances made within the cable and telecoms industry. There has been a transition to gigabit-speed, end-to-end connectivity being provided through a mix of very high capacity network technologies, with increased convergence of fixed and mobile networks. It was therefore time to relaunch our collaboration under a strengthened voice for private investors in very high capacity networks. And this voice is GIGAEurope.

CORNERSTONE FOR DIGITAL & GREEN TRANSITION

The COVID-19 pandemic added further momentum to reaching the EU 2025 Gigabit Connectivity targets. It requires the full range of network technologies to be deployed.

GIGAEurope members continue to do their part and invest in the evolution of the gigabit infrastructure. It is a cornerstone of Europe's technology leadership and digital competitiveness ambitions. As part of the European digital ecosystem, we can jointly deliver on the promise of the data economy by democratizing access to emerging technologies for SMEs and professionals. Gigabit connections and seamless fixed/mobile connectivity solutions are ready to power European Cloud, IoT and AI-based applications at scale.

¹ As outlined in the European Commission's Communication "Connectivity for a Competitive Digital Single Market - Towards a European Gigabit Society" - COM(2016)587, see: <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52016DC0587&from=en>

² DESI 2020 report, European Commission. In this report, Very High Capacity Networks coverage is approximated as the combined footprint of FTTP (Fiber to the Premises) and DOCSIS 3.1 (Data Over Cable Service Interface Specification 3.1) cable networks.

We believe policy makers should take the following points into account to support a digital and green transition:



Networks fit for Europe's Digital Decade: On the road towards an inclusive Gigabit Society, reaching the EU's gigabit connectivity goals¹ is a precondition. Commissioner Thierry Breton recently stated his ambition to have 100% of European homes connected to 1Gbps internet access by 2025. In 2019, fixed very high capacity networks were available to 44% of European households², so significant investment in the roll-out of gigabit infrastructure is still ahead. Immediate priorities for accelerating the gigabit ambitions relate to reduction of the cost of deploying very high capacity networks and to ensuring investment-friendly 5G spectrum licensing approaches.



Swift roll-out of 5G: Deployment of 5G needs to be accelerated by completing spectrum auctions under conditions that preserve the investment case for fast and secure 5G infrastructure build and roll-out.



Support consolidation of European telecoms market: Consolidation is to be encouraged to foster strong European telco competitors and a real internal market need to be completed for telecom services, so Europe can fully realise its digital growth opportunity.



Achieving a Digital & Green transition: The European Commission has set ambitious goals of becoming the first carbon neutral continent by 2050 together with sector-specific target of zero carbon emission by 2030 for telecommunications networks and data centres. By connecting SMEs and socio-economic operators to gigabit networks, providers act as a catalyst for the greening of the European economy more broadly. Our members continue upgrading network technologies and implementing significant decarbonization measures around renewable energy, recyclable materials and sustainable supply chains.




Ensuring efficient investment: We support the Commission's initiative of allocating 20% of the EU Recovery Fund to investments in digital transition. National recovery & resilience plans should balance efficient public spending with creating conditions best suited for private investment, by ways of creating a common toolbox around best practices. The European gigabit objectives will be achieved by a mix of fixed and wireless technologies and through a combination of private and public investment.

CONNECTIVITY SECTOR RESPONSE TO COVID-19

Managing unprecedented internet traffic over broadband networks

³Data provided by OMDIA.

⁴BEREC is the Body of European regulators for Electronic Communications, see: https://www.berec.europa.eu/eng/news_and_publications/whats_new/7652-berec-continues-monitoring-the-status-of-internet-capacity-regulatory-and-other-measures-in-light-of-the-covid-19-crisis



As a consequence of the pandemic lockdowns, network occupancy surged almost overnight due to the uptake in home working, online learning, remote healthcare services and digital public services. Research shows increases of 30-40% in VPN traffic, over 50% in video streaming, 75% in online gaming and a whopping +200% increase in internet telephony and online videoconferencing³. Despite the sharp increase in network capacity demand, no major network congestions occurred as evidenced by BEREC's summary reports on the status of internet capacity since March⁴. Networks are proving to be resilient throughout the crisis, which is due to the private investments in network innovations year-on-year, in terms of higher speeds, lower latency and more bandwidth - well ahead of the crisis.

Keeping societies connected

Europe's ability to move forward during the pandemic also relied to a significant extent on GIGAEurope members' crucial contribution in keeping societies connected by pro-actively reaching out to customers and communities.

Here are a few examples of crisis-response measures taken by connectivity providers:

- Providers introduced essential internet offerings at social tariffs for low income and vulnerable groups.
- Data, voice and text caps were temporarily increased or even replaced with unlimited offerings for mobile subscribers.
- Complimentary speed upgrades were introduced, lifting entire subscriber bases to +100 Mbps.
- Socio-economic drivers like schools and hospitals were supported with tailored connectivity solutions, sometimes at no charge.
- Information hubs were created for consumers and business customers to ensure secure and effective home working environments and optimal in-house connectivity configurations.
- In partnership with the civil society, special helpdesk was established aimed at supporting the elderly with learning digital skills and getting online.
- Kids and family entertainment channels were expanded and often offered for free.

Partnering with governments in pandemic mitigation

Connectivity providers also partnered with governments in order to empower effective virus mitigation approaches in the first and second wave of the pandemic. Anonymized and aggregated insights from mobile telecoms data were shared in privacy compliant ways with authorities for virus tracking and containment purposes. Providers will continue to support authorities in the shaping and execution of new corona exit strategies down the line.