

Next steps for the UK telecoms sector: growth, consolidation and regulation 3^{rd} March 2016

CONDITIONS FOR USE OF TRANSCRIPTS:

This document is intended to provide a timely reference for interested parties who are unable to attend the event to which it refers. Some portions are based on transcripts of proceedings and others consist of text submitted by speakers or authors, and are clearly marked as such. As such, apart from where it is indicated that the text was supplied by the speaker, it has not been possible for the transcript to be checked by speakers and so this portion of the document does not represent a formal record of proceedings. Despite best endeavours by Westminster eForum Projects and its suppliers to ensure accuracy, text based on transcription may contain errors which could alter the intended meaning of any portion of the reported content. Anyone who intends to publicly use or refer to any text based on the transcript should make clear that speakers have not had the opportunity for any corrections, or check first with the speaker in question. If in doubt, please contact the forum first.

Contents

About this Publication	3
Agenda Agenda	4
Session Chair's opening remarks	
Lord Best, Chair, House of Lords Communications Committee (transcript)	5
Developments and trends in the telecoms market	
Alex Holt, Partner and Head of Telecoms, KPMG (transcript)	6
Key findings from Ofcom's Strategic Review of Digital Communications	
Clive Carter, Director of Strategy, Ofcom (transcript)	9
Questions and comments from the floor (transcript)	14
The future shape of the telecoms market: consolidation, competition and convergence	
Julian Ashworth, Global Director of Group Industry Policy, BT Group (transcript)	19
Raj Sivalingam, Executive Director, Telecoms and UK Spectrum Policy Forum, techUK (transcript)	22
Andrew Heaney, Executive Director, Regulation and Strategy, TalkTalk (transcript)	24
Dan Butler, Head of Public Affairs and Policy, Virgin Media (transcript)	26
Nicolas Ott, Managing Director, Telecoms & M2M, Arqiva (transcript)	29
Questions and comments from the floor with Alex Holt , Partner and Head of Telecoms, KPMG (transcript)	31
Session Chair's closing remarks	
Lord Best, Chair, House of Lords Communications Committee (transcript)	41
Session Chair's opening remarks	
Roger Darlington, Chair, The Consumer Forum for Communications (CFC) (transcript)	42
Case study: working across sectors, markets and platforms	
Theo Bertram, Public Policy Manager, EMEA, Google (transcript)	43
Regulatory and legal priorities for the UK and EU	
Graham Louth, Partner, Aetha Consulting (transcript)	46
Stefan Stanislawski, Founding Partner, Ventura Team (transcript)	49
Paul Graham, Partner, Head of Communications, Fieldfisher (transcript)	53
Samira Gazzane, Policy Manager, Broadband Stakeholder Group (transcript)	56
Questions and comments from the floor with Theo Bertram , Public Policy Manager, EMEA, Google (transcript)	59
Session Chair's and Westminster eForum closing remarks	
Roger Darlington, Chair, The Consumer Forum for Communications (CFC) (transcript)	65
Daniel Patefield, Forum Lead, Westminster eForum (transcript)	66
List of Delegates Registered for Seminar	67
Contributor Biographies	72
About the Core Sponsors of the Westminster eForum	75

Please be advised that speakers' PowerPoint presentations are included within the transcript itself, just beneath the relevant speaker's text. Please note that not all speakers are able to grant permission for us to include their slides.

About this Publication

This publication reflects proceedings at the Westminster eForum Keynote Seminar: Next steps for the UK telecoms sector: growth, consolidation and regulation held on 3^{rd} March 2016. The views expressed in the articles are those of the named authors, not those of the Forum or the sponsors, apart from their own articles.

Although Westminster *e*Forum is grateful to all sponsors for the funding on which we depend, participation in events and publications is never conditional on being a sponsor. As well as funding ongoing operations, sponsorship enables the Forum to distribute complimentary copies of publications, and offer complimentary tickets for events, to Government ministers, parliamentarians and officials most involved in policy.

This publication is copyright. Its copying, in whole or in part, is not permitted without the prior written consent of the publishers. However, extracts of the text may be reproduced for academic or review purposes, subject to the conditions of use outlined in the previous page, providing they are accurate, are not used in a misleading context and the author, their organisation and the Westminster *e*Forum are acknowledged. We would also appreciate being informed.

Westminster eForum

UK Headquarters 4 Bracknell Beeches Old Bracknell Lane West Bracknell Berkshire RG12 7BW

T: 01344 864796 F: 01344 420121 publications@westminsterforumprojects.co.uk

Directors

Peter van Gelder Chris Whitehouse