

cerre

Centre on Regulation in Europe  
Improving network and digital industries regulation



# MAPPING OUT THE NEW FRONTIER OF REGULATION

2018 **CERRE**  
Annual Review

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# 2018 REVIEW

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## THE CENTRE ON REGULATION IN EUROPE

This report highlights the achievements, impact and activities of the Centre on Regulation in Europe (CERRE) for the period January 2018 to December 2018.

## MESSAGE FROM THE CHAIRMAN



In 2018, CERRE has continued to define and implement with its members an agenda of informing policy-making relevant to an ever better regulation of the network and digital industries operating in Europe.

The Board of Directors is more than ever convinced of the crucial significance of CERRE's mission if those industries are expected - both now and in the future - not only to deliver and maintain the right quality of services to all consumers and customers at fair terms and conditions but also to respect all citizens' rights in a democratic society.

Throughout the year, working with members, our hugely experienced professional and academic staff has developed and disseminated top quality, policy-relevant contributions. The Board supports the management's ongoing efforts to uphold and protect the independence of those activities. It sees this as vital if CERRE's work is to effectively help inform decision makers to make the right choices.

Finally, the Board fully supports the Director General's ambitious plans for 2019 and beyond. It considers these will provide value to both current and future members as well as allowing CERRE to position itself as a genuinely public good. This is the only way that CERRE will prosper as one of the most respected and influential regulatory think tanks in the European arena.

### **William Emery**

Chairman of the Board of CERRE

Chairman of the Board of the Northern Ireland Authority for Utility Regulation



**MESSAGE  
FROM  
THE DIRECTOR  
GENERAL**



# MAPPING OUT THE NEW FRONTIER OF REGULATION

## REGAINING TRUST AND EMPOWERING EUROPEAN CITIZENS

"The times they are a-changin'" wrote Bob Dylan in 1964. More than ever, the iconic words of the American poet and singer are valid. The rising inequality, speedy digitisation of all parts of economic, social and public life, and increased awareness of climate change threats, to name just a few, are affecting in unprecedented ways our lives and our societies. Fear of the future is becoming the prevalent concern for many citizens.

In Europe and around the world, this is reinforcing a deep distrust in traditional political forces. It also provides growing appeal to groups directly opposing the European values of democracy and solidarity. Not surprisingly in this context, the European project is experiencing a profound crisis.

I am convinced that, to overcome disenchantment and frustration, appropriate policy responses will require new governance principles, new roles, new types of cooperation and new responsibilities for all private and public actors.

Resilient and robust regulation will doubtless be part of the policy kit to be reinvented to fix suffering democracies and societies. By its very nature, such regulation puts consumers' interests and citizens' rights at the forefront. And empowering citizens in their daily life is a necessary condition to help them regain trust in Europe's institutions.

It is CERRE's mission to actively contribute to this process. Our think tank promotes regulation that stimulates citizens' engagement in the energy transition, helps them to safely harvest the fruit of the digital economy and allows them to benefit from the smart mobility revolution.

In doing so, we are prepared to reconsider traditional regulatory provisions, without bias or fear. We design new, principle-based approaches and we promote "regulatory sandbox" mechanisms that allow regulation to keep up with the fast pace of innovation and new business models.


Thanks to its unique structure, its top-level academic resources, its diversified membership and its independence, CERRE has become the ideal place to explore these new approaches to regulation, and to generate ideas and solutions. It is thrilling for me to witness CERRE's ever-increasing recognition as a leading and pivotal think tank for the regulation of digital and network industries. CERRE is a growing reference point for high-quality research. It is a unique forum, where industry, regulators, member states and EU policy makers, civil society and academia come together to openly exchange very different perspectives. It is a well of novel ideas that help decision makers take better decisions for the common good.

2018 was a pivotal year for CERRE. We have reached an important landmark with more than 50 member organisations, corporations, regulatory authorities and academic centres, closely involved in our work. To meet our members' expectations, we have also strengthened our capability to operate efficiently. This includes significant progress in our communications activities, to increase the impact of our work.

2019 will be a very special year for Europe with parliamentary elections, the appointment of a new European Commission and, hopefully, the end, one way or another, of the Brexit process. To contribute to the EU's future work and guide the newly elected institutions, CERRE will share with them in the course of the summer its White Paper 2019-2024. This document will present our think tank's regulatory priorities and ambitions for a stronger European Union which is determined to regain citizens' trust.

My final word will be for the dynamic team of talented academics and professionals I am tremendously proud to be leading. I would like to express my deepest gratitude to every member of the CERRE staff and to our members whose confidence and engagement make our achievements possible.

**Bruno Liebhaberg**



**Resilient and robust regulation will doubtless be part of the policy kit to be reinvented to fix suffering democracies and societies. By its very nature, such regulation puts consumers' interests and citizens' rights at the forefront. And empowering citizens in their daily life is a necessary condition to help them regain trust in Europe's institutions.**

# UNFOLDING CERRE

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**CERRE's** purpose is to support and bring decisive contributions for ever better regulation of network and digital industries in Europe and beyond. Over the years, we have seen the growing convergence and interactions between the energy, mobility, media, telecom and online economy sectors, creating new opportunities and challenges for regulation. CERRE's approach has allowed us to actively adapt to fast changing technology, business models and markets.

Promoting ever better regulation, we foresee rules that guarantee access to quality services at reasonable prices for all citizens, consumers and users today, while stimulating investments and innovation for tomorrow. These rules should also safeguard citizens' rights and ensure strong consumer protection as well as appropriate competition between industry players.

The CERRE academic and secretariat staff, as well as members, mutually support applied research that will help political, regulatory and business leaders to take better decisions for all. We do that by developing and disseminating high-quality, policy-oriented research undertaken by top-level academics based all over Europe.

## THE CERRE CORNERSTONES

### MULTIDISCIPLINARY ACADEMIC EXCELLENCE

CERRE is proud of the excellence of its academics; thinkers who have deep knowledge of the markets as well as of regulation.

We have built a strong and diverse multi-disciplinary academic team with renowned economists, lawyers and legal experts, engineers and political scientists with expertise in the energy, mobility, water, waste, and digital sectors (including media, telecom and internet-based services).

This diversified team has the ability to consider the many viewpoints, to perform nuanced in-depth analyses and to build strong regulatory and policy recommendations.

### BUILDING BRIDGES ACROSS ACTORS AND SECTORS

We have developed a unique membership by bringing together regulators, industry and academia from various network and digital sectors. We break the silos and build communities with actors that have different agendas.

This distinctive transversal membership allows us to develop both sector-specific and cross-sectoral research projects that lead to novel ideas.

By doing so, we are building bridges and creating the right forum for key actors to debate highly important issues and find the best recommendations for regulation that will contribute to making Europe a better place for everyone.

### CHALLENGING BUSINESS AS USUAL

CERRE's voice is well respected amongst EU policy makers and regulators because we bring sound, neutral, novel, and forward-looking recommendations to burning policy and regulatory questions.

CERRE does not shy away either from thorny questions or from difficult answers. Our structure and the quality of our work help us test and interrogate dominant paradigms with actionable recommendations for a more dynamic regulatory framework.

Because our purpose is to work for ever better regulation to the benefit of citizens while allowing for innovation and competitiveness, our contribution to the regulatory debate always seeks to empower decision makers through constructive discussions.

### INDEPENDENCE

We deliver independent research and analysis. We never compromise our independence. We only partner with those who respect our independence and accept the impartiality of our academics and their research.

While our members provide valuable input in our work programme and research projects, the CERRE Academic Council and leadership team remain the sole decision-makers for any CERRE content and material.





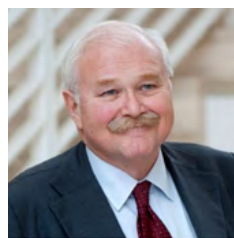
## THE BOARD (MAY 2016 - MAY 2019)

The 2018 Board of CERRE is chaired by William Emery, Chairman of the Board of the Northern Ireland Authority for Utility Regulation. It is composed of high-level representatives from regulators, enterprises and academia active in the energy, mobility and digital sectors from around Europe. It also includes an independent member, Pascal Lamy, President Emeritus of the Institut Jacques Delors, former Director General of the WTO, and former EU Commissioner for Trade.



**WILLIAM EMERY**

Chairman of the Board, Northern Ireland Authority for Utility Regulation



**ANGELO CARDANI**

President, AGCOM



**PASCAL DE BUCK**

CEO, Fluxys



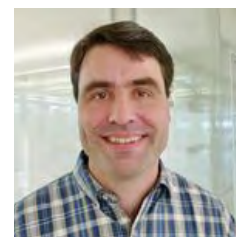
**ERIC DE KEULENEER**

Professor, Université Libre de Bruxelles



**ANNEGRET GROEBEL**

Head, International Relations, Bundesnetzagentur



**KAI-UWE KÜHN**

Professor, Centre for Competition Policy, University of East Anglia



**PASCAL LAMY**

President Emeritus, Institut J. Delors; former Director General, WTO; former EU Commissioner for Trade



**PIERRE MESSULAM**

Deputy Director General, SNCF Transilien



**STEVEN TAS**

Vice President Regulatory, Proximus

## THE CERRE MANAGEMENT AND SUPPORT TEAM

Bruno Liebhaberg heads up the CERRE management and support team. The permanent staff based in Brussels is responsible for the daily management of CERRE, the smooth deployment of our research activities, communications and the overall development of the think tank.



BRUNO LIEBHABERG <sup>1</sup>	DIRECTOR GENERAL
MARC BOURREAU	JOINT ACADEMIC DIRECTOR
MARTIN CAVE	JOINT ACADEMIC DIRECTOR
ALEXANDRE DE STREEL	JOINT ACADEMIC DIRECTOR
JAN KRÄMER	JOINT ACADEMIC DIRECTOR <sup>2</sup>
MICHAEL POLLITT	JOINT ACADEMIC DIRECTOR
NILS-HENRIK M. VON DER FEHR	JOINT ACADEMIC DIRECTOR
MÀXIMO MICCINILLI <sup>3</sup>	DIRECTOR, ENERGY
LAURIANE GIET	SENIOR COMMUNICATION MANAGER
JOHN MCSWEENEY	SENIOR PROGRAMME MANAGER
MARYSE FERNÉMONT	OFFICE MANAGER
JESSICA GALISSAIRE	PROJECT MANAGER
LAURA VAN STEEN	EVENTS MANAGER

<sup>1</sup>Representing B. Liebhaberg S.A

<sup>2</sup>As from 1 September 2019

<sup>3</sup>Representing One Policy Lab SPRL, as from 1 February 2019



## VALUING OUR ACADEMIC TEAM

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### Academic Council

CERRE places great emphasis on ensuring a strong and diversified team, in terms of background, specialities, experience, gender and geography. The CERRE Academic Council is led by the Director General and the Joint Academic Directors. It also includes more than 20 Research Fellows based throughout Europe. Council members are renowned economists, lawyers, engineers and political scientists, in the energy, digital, mobility and water services markets. We are proud to be gathering such an outstanding academic team.

A plenary meeting of the Academic Council takes place twice a year to develop both sector specific and cross sector research. During those meetings, debated topics relate to the various sectors' agenda. They also refer to transversal matters for the regulation of network and digital industries.

The Academic Council has been reinforced in 2018 with the arrival of Michèle Finck (Senior Research Fellow, Max Planck Institute for Innovation & Competition), Monica Giuliatti (Professor, Loughborough University), Pierre Senellart (Professor, École Normale Supérieure), Bert Willems (Professor, Tilburg University). Further academic recruitment remains a priority for 2019 to reinforce our research team and spectrum.

THE EXCELLENCE,  
COMMITMENT AND  
ENTHUSIASM OF ALL OUR  
**ACADEMIC COLLEAGUES**  
IS HIGHLY APPRECIATED

## DIGITAL TEAM



**MARC BOURREAU**  
Telecom ParisTech  
CERRE Joint  
Academic Director



**MARTIN CAVE**  
London School of  
Economics  
CERRE Joint  
Academic Director



**ALEXANDRE DE  
STREEL**  
University of Namur  
CERRE Joint  
Academic Director



**SALLY BROUGHTON  
MICOVA**  
University of East  
Anglia



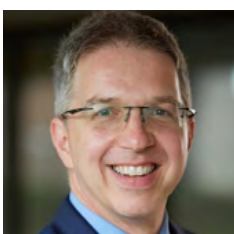
**RICHARD FEASEY**  
University College  
London



**MICHÈLE FINCK**  
Max Planck Institute  
for Innovation &  
Competition



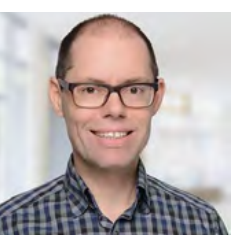
**JAN KRÄMER**  
University of Passau



**PIERRE LAROCHE**  
University of  
Montréal



**WOLTER LEMSTRA**  
Nyenrode Business  
Universiteit



**MARTIN PEITZ**  
University of  
Mannheim



**PIERRE SENELLART**  
École Normale  
Supérieure



## Being part of an inspiring team

**"CERRE offers us the chance to work with incredibly talented peers from all over Europe to contribute to better policies and regulation for a stronger digital Europe."**

**ALEXANDRE DE STREEL**  
Joint Academic Director, CERRE  
Professor, University of Namur





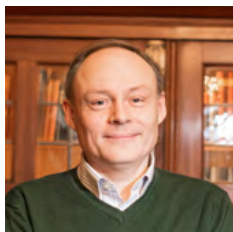
## A unique and exciting forum

“Working with CERRE is an ideal opportunity to speak to and hear from the heart of European policy making. It is an intellectually exciting environment where experts from academia, regulators and industry across Europe get the opportunity to interact with each other and with those actually implementing Europe’s energy and climate goals.”

### MICHAEL POLLITT

Joint Academic Director, CERRE  
Professor, University of Cambridge

## ENERGY TEAM



### MICHAEL POLLITT

University of Cambridge  
CERRE Joint Academic Director



### NILS-HENRIK M. VON DER FEHR

University of Oslo  
CERRE Joint Academic Director



### FRÍÐRIK MÁR BALDURSSON

Reykjavik University



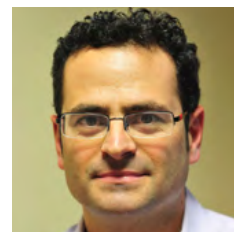
### MONICA GIULIETTI

Loughborough University



### CHLOÉ LE COQ

Stockholm School of Economics



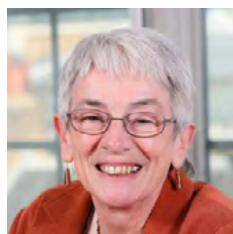
### JOSE LUIS MORAGA

Vrije Universiteit Amsterdam



### SEBASTIAN SCHWENEN

Technical University of Munich



### CATHERINE WADDAMS

University of East Anglia



### BERT WILLEMS

Tilburg University

## MOBILITY TEAM



### YVES CROZET

University of Lyon



### CHRIS NASH

University of Leeds



### GEORGINA SANTOS

Cardiff University



## ADDITIONAL CONTRIBUTORS



**MIRIAM BUITEN**

University of  
Mannheim



**CHI KONG CHYONG**

University of  
Cambridge



**MACHIEL MULDER**

University of  
Groningen

We have also made use of our academic network to reinforce and guarantee the best quality of specific project teams.



**AMBRE NICOLLE**

ISTO, LMU Munich



**ANDREW SMITH**

Institute for Transport  
Studies, University of  
Leeds

## SENIOR ADVISORS



**ALBERT BENATAR**

Communications &  
Marketing



**GRAEME STEELE**

Energy

## Shaping the future

"The regulatory issues CERRE is working on – relating to communications, platforms, energy, mobility and water - are shaping every European's future well-being in profound ways. Having been involved from the beginning, I am proud of what we have, and shall, achieve."

### MARTIN CAVE

Joint Academic Director, CERRE  
Visiting Professor, London School of  
Economics and Political Science

# FUNDING

Total funding

**€1,375,167.00**

Core funding  
(membership fees)

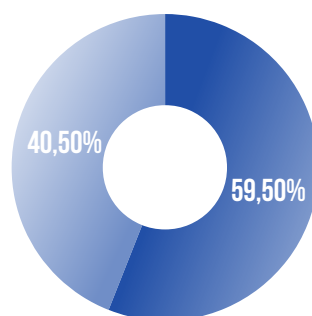
**€ 817,667.00**

Projects funding

**€ 557,500.00**

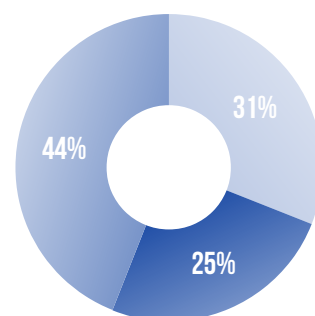


Percentage of membership fees & project contributions in overall CERRE budget



■ Membership  
■ Projects

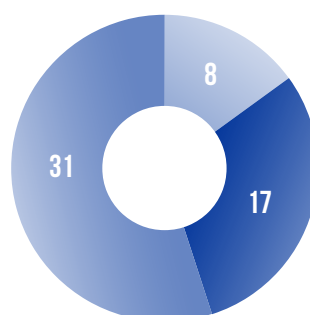
CERRE annual budget  
Scale of members' contribution



■ €5,000 - 20,000 / member  
■ €20,000 - 55,000 / member  
■ €55,000+ / member

## CARING FOR OUR MEMBERS

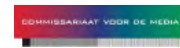
CERRE members play a central role in shaping our work programme, along with our academic team. They are also actively involved in the development and dissemination activities of our various research projects. Whether they are regulators, industry or academia, each actor offers a complementary dimension to our research, which makes our contribution to the debate even more constructive and powerful.



■ Regulators  
■ Universities  
■ Corporations

CERRE members per type of organisation

# OUR 2018 MEMBERS



# STRATEGIC RESEARCH FOR EVER BETTER EU REGULATION

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## ENHANCING REGULATION ACROSS SECTORS

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We are seeing an ever-increasing digitisation of all sectors of the economy as well as the emergence of new technologies such as blockchain and artificial intelligence and their application across many sectors. These developments and the new challenges which they raise play a central part in CERRE's research.

In those dynamic and uncertain market environments, new forms of governance are needed to ensure trust in European and national authorities as well as in industry. It is only with regained trust that a European project that benefits citizens and consumers can prevail.

CERRE brings together the experience from different sectors to identify and analyse common features, approaches and instruments. Our unique cross-sectoral research has enabled us to be at the forefront of research for better regulation.

## CERRE, a new quality standard

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**"CERRE studies and events have become a new quality standard in the analysis and discussion of issues of high relevance and impact for telecommunications and digital markets."**

### MARC LEBOURGES

Head of European & Economic  
Regulation, Regulatory Affairs  
Orange

## Highlights

The scope of CERRE's work includes all network industries regulation. Although our 2018 activities have focused on the energy, digital and mobility sectors, we have in the past and will continue to engage in other network industries regulation such as water, postal services and gaming.

We have also initiated major projects, notably on the internet of energy and on digital technologies and mobility.

In 2018, amongst many other activities we have hosted a debate on "Innovation: the X-factor in mergers & competition law?" with the participation of Tommaso Valletti, Chief Competition Economist of the European Commission (and formerly, Joint Academic Director of CERRE) and Arno Rasek, Chief Economist of the Bundeskartellamt.

The event also gathered representatives from national competition authorities, regulators, industries, policymakers, academics and independent experts from the energy and digital sectors, .

## What's ahead

In 2019, CERRE will publish its White Paper on regulatory priorities for the next European Commission and Parliament. This significant and ambitious piece of research will outline key challenges for European policymakers for the coming years. It will deliver clear policy and regulatory recommendations to guide their work. It will address both sector-specific issues in the fields of energy, digital and mobility, as well as cross-sector topics such as platforms regulation, data and AI, and institutional issues.

In addition, CERRE's Work Programme for 2019 will feature research and events on key cross-sectoral issues including the successes and failures of the use of blockchain in network industries, a potential new European industrial policy and the need for a better alignment of privacy law, competition law and consumer protection law.

### 360 degree view on highly relevant questions

**"CERRE's reports and events  
always provide an excellent 360  
degree view on highly policy-  
relevant questions."**

**GEZA SAPI \***

Chief Economist Team  
European Commission - DG COMP

\* The view expressed here is personal and may  
not in any circumstances be regarded as  
stating an official position of the European Union





The European Commission's ambitious agenda to strengthen the Digital Single Market for Europe has led to intense policy and regulatory activity in 2018. European policy makers have made significant progress towards these ambitions and greater consumer protection, mostly with major pieces on e-commerce and online platforms as well as on data (stronger rules for the protection of personal data and the free flow of non-personal data) and initiatives on Artificial Intelligence. We should also note the implementation of the end of roaming charges, the amending of the Audio-Visual and Media Services directive, and the new European Electronic Communications Code.

With innovation apace, and old economic models being challenged, the telecommunications, media and digital sectors are experiencing huge transformations. Digital services have become a force for innovation across all sectors of the modern economy. They also require new or different regulation. 2018 marked a new stage in the redefinition of our work in this sector to match the reality of these markets and trends. The reports we have published and started working on in 2018 reflect this. This shift is also echoed in our membership, with platforms like Facebook and Snap Inc. joining our think tank.

## Highlights

We undertook research on a wide range of digital issues, including on the governance of data, spectrum management, the liability of online platforms, the rollout of 5G and ultrafast broadband in Europe, and zero-rating.

### REPORT - A FRESH LOOK AT ZERO-RATING, 28 MARCH 2018

A CERRE Executive Seminar on 'Governance of data and neutrality' gathered nearly 60 participants. High-level speakers for this event included Sébastien Soriano, Chairman of Arcep, and Johannes Gunzl, BEREC Chair for 2018 and Managing Director for Telecommunications & Postal Services at the Austrian Regulatory Authority for Broadcasting & Telecommunications.

An article based on the CERRE study was published in 'Telecommunications Policy', a peer reviewed journal specialised in the roles of information and communication technologies in the economy, governance and society.

- [Featured in Telecommunications Policy, 'A fresh look at zero-rating', Jan Krämer, Martin Peitz August 2018](#)

# ADVANCING THE EU DIGITAL AGENDA AND REGULATION

## PRESENTATION - CONSTRUCTING THE EUROPEAN DIGITAL SINGLE MARKET, 11 JULY 2018

CERRE's Joint Academic Director Prof. Alexandre de Streel gave a presentation to a workshop of the European Parliament Committee for Internal Market & Consumer Protection (IMCO). The workshop focused on the contribution of the internal market and consumer protection to growth. Prof. de Streel's presentation focused on a review of EU policy techniques to stimulate the Digital Single Market, actions taken during the 2014-2019 legislature and possible future actions for the next EU institutions.

**"We should say that a lot has been achieved for the DSM during the 8th Parliamentary Legislature. However, there are still fields where supplementary actions can and should be taken, in particular more ambitious actions to develop e-government, to ensure the fluidity of data and develop an ambitious EU industrial policy for AI."**

Alexandre de Streel, CERRE Joint Academic Director and Professor at the University of Namur

## REPORT - LIABILITY OF ONLINE HOSTING PLATFORMS: SHOULD EXCEPTIONALISM END?, 12 SEPTEMBER 2018

This report was discussed and presented during private and high-level events which gathered more than 70 people. Tiina Astola, Director General of the European Commission Directorate General for Justice gave a keynote speech at the CERRE Executive Seminar.

**"In discussions about how authorities move forward with the governance of digital platforms, CERRE is an interesting interlocutor because of the diversity of its membership and its efforts to build its positions on academic research."**

Marie-Paule Benassi, Acting Head, 'Consumers' Directorate, DG JUST, European Commission

## PRESENTATION - REVISITING THE LADDER OF INVESTMENT, 16 OCTOBER 2018

CERRE's Joint Academic Director Prof. Marc Bourreau gave an academic keynote at the WIK (Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste) conference on the Future of Connectivity. The workshop was dedicated to

the implications of the EU Electronic Communications Code and strategies for deploying fibre in underserved areas. His address focused on the evolution of the ladder of investment in light of the new Code.

## REPORT - STATE AID FOR BROADBAND INFRASTRUCTURE: ASSESSMENT & POLICY RECOMMENDATIONS, 21 NOVEMBER 2018

This report was presented at a CERRE Executive Seminar which gathered around 40 participants. We also hosted two private workshops with the research team, CERRE members and representatives from the EU institutions during the preparation of the report.

- [Featured in Telecom Paper. 'EU needs more, better public funding to meet broadband goals – study' 21 November 2018.](#)
- [Featured in L'Echo. 'Proximus, Telenet et Voo ont porté seuls l'arrivée du haut débit' 26 December 2018](#)

## What's ahead

In 2019, CERRE will undertake more research on timely topics at the heart of the EU digital agenda. To do so, we have organised our work in three streams that reflect this new market reality, as well as policy and regulation priorities:

- Digital platforms, with research on device neutrality and neutrality obligations across the digital value chain, the market power of online platforms and the playing field in audio-visual advertising;
- Data and AI, with projects such as data portability, artificial intelligence and liability;
- Infrastructure, with amongst others, the implementation of the new European Electronic Communications Code, and research on how to stimulate 5G development in Europe.

**"CERRE's work and studies often take a very fresh look at important regulatory topics and therefore provide outstanding food for thought for the development of the telecom framework."**

JOHANES GUNGL  
CEO, RTR



In November 2018, the European Commission presented its strategic long-term vision for a prosperous, modern, competitive and climate-neutral economy aiming to reduce CO<sub>2</sub> emissions by 80% below 1990 levels by 2050. To reach this objective, de-carbonising the whole energy sector, including residential heating and road transport, is essential. In this carbon-free future, what place will renewable energy sources have? What impact will this have on markets? What will be the role of gas in a decarbonised Europe? How should regulation evolve to reflect those changes?

CERRE works with a unique mix of academic expertise and business insights to research, analyse and provide recommendations to answer these questions and contribute to robust regulation of energy markets for the benefit of all.

## Highlights

Throughout 2018, CERRE released forward-looking studies, organised high-level events and took part in energy conferences to shed light on major energy matters.

### **REPORT - GAS AND THE ELECTRIFICATION OF HEATING & TRANSPORT: SCENARIOS FOR 2050, 24 MAY 2018**

This report was discussed and launched at a CERRE event gathering more than 40 participants. It was also presented at various occasions including the EU Sustainable Energy Week (6 June 2018) and the Madrid Forum (17 October 2018).

- [Featured in Het Financieele Dagblad. 'Er moeten meer gascentrales komen. En ze zullen rendabel zijn' 24 May 2018](#)

# BOOSTING THE EU ENERGY REGULATION

## REPORT - EUROPE'S ELECTRICITY MARKET DESIGN: 2030 AND BEYOND, 10 DECEMBER 2018

We organised a CERRE Executive Seminar to disseminate this report, which was subsequently presented at the European Utility Week (7 November 2018).

- Featured in Euractiv, '[Capacity mechanisms: key issues to watch](#)' and '[Academic: Fossil fuel back-ups 'may be the price to pay' for renewables](#)'. September 2018
- Featured in Pv magazine, '[Wind, solar could be self-financing by 2025 under current European electricity market design](#)'. 10 December 2018

## A strong reputation for independence

"In the electricity market design negotiations, it was very effective for us to rely on CERRE studies as CERRE has a strong reputation for being independent and competent."

### FLORIAN ERMACORA

Head of Unit, Wholesale markets: electricity and gas, DG ENER, European Commission

## What's ahead

In 2019, CERRE will further increase its work on energy regulation with research projects on the rollout of electric vehicles and the potential role of renewable gases and hydrogen in the energy mix. As the sector is experiencing an unprecedented digitisation, we will also look into topics such as the Internet of Energy.

We will be present at major energy forums including the EU Energy Summit, the Flame Conference in Amsterdam and the Madrid Forum to continue to influence policy discussions in the area of energy regulation in Europe.

## Paramount robust and consistent studies

"The EU's efforts to decarbonise its economy through a new electricity market design highlight the numerous issues Europe is facing in defining the energy sector of the future in term of technology, market dynamics, business models and regulation. In this context, CERRE's robust and consistent proposals and studies on a future-proof and efficient regulation, also looking beyond 2030, have been paramount."

### SIMONE MORI

Head of European Affairs & Head of Europe and North Africa, ENEL



# INFORMING MOBILITY AND RAIL REGULATION



The mobility industry is a strategic sector for the European economy, and one that can significantly contribute to delivering a greener future for our society. As digitalisation is permeating the entire economy, it opens up opportunities and challenges, in particular for the transport sector.

Until recently our activities in that sector had been exclusively focused on the railway industry and its regulation. We are now extending our focus to the regulatory framework of mobility as a whole, including its digital aspects. Our research looks critically at regulatory implications of that radically changing sector with a view to provide recommendations that will help address new challenges, and unlock investments and innovation in this field.

This has led to the launch of major, forward-looking projects on Mobility as a Service (MaaS) and the rollout of electric vehicles in Europe. As a result, prominent actors like Uber have joined CERRE and for the first time, we have also partnered with public transport authorities of large European metropolitan areas, including Barcelona, Frankfurt, Paris and Oslo.

## Impressive track record on EU policy research

**"CERRE's impressive track record on EU policy research and ability to bring various stakeholders together has contributed to a more inclusive and constructive debate."**

**LAURIN SEPOETRO**

Manager, Public Policy, Uber



## Highlights

### REPORT - TRACK ACCESS CHARGES: RECONCILING CONFLICTING OBJECTIVES, 9 MAY 2018

The report of this research project was discussed during working meetings and a CERRE Executive Seminar gathering key stakeholders from the industry, regulators, policy makers and academia. The project findings and recommendations were also presented at the RailTech Track Access Charges Summit 2018 in Amsterdam (4 May 2018), as well as in a private workshop requested by the Commission's Directorate General for Transport (DG MOVE).

- [Featured in Railway Gazette International, June Editorial 'Who pays for the infrastructure?'](#)

## What's ahead

The findings of CERRE's innovative research project on 'Digitisation and Mobility as a Service: Regulatory Challenges and Opportunities' will be presented and debated at high-level events in Paris and Brussels in September 2019. This project brings together traditional and new mobility service providers operating in several European countries. It will deliver important recommendations for a dynamic and radically-changing sector.

Despite this shift towards a work programme that considers all modes of transport, CERRE will continue to address issues for the rail industry, including how to encourage innovation and competition, and what will be the impact of digitisation in the rail sector.

### Highly relevant topics and interesting people around the table

**"It is a pleasure to participate in CERRE events given the highly relevant topics addressed and interesting people around the table. I look forward to future CERRE events."**

#### STEFAN TOBIAS

Head, Economics and Tax Policy,  
Community of European Railway and  
Infrastructure Companies

### Mobility: from competition to regulation

**"Competition is at the heart of European policies. But market failures do remain within freight and passenger transport. CERRE is the key place to address regulatory issues in the field of mobility."**

#### YVES CROZET

Research Fellow, CERRE  
Professor, LAET, University of Lyon

## IMPACT AND FIGURES

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Original in-depth research reports initiated, including 6 published in 2018 and 9 to be published in 2019

### High-profile speakers, including:

- Tiina Astola, Director General, DG Justice & Consumers, European Commission
- Harald Gruber, Head, Digital Infrastructure, Projects Directorate, European Investment Bank
- Johannes Gungl, BEREC Chair 2018
- Pascal Lamy, President Emeritus, Institut Jacques Delors
- Michael O'Flaherty, Director, European Union Agency for Fundamental Rights
- Sébastien Soriano, Chairman, Arcep
- Tommaso Valletti, Chief Economist, DG Competition, European Commission
- Anthony Whelan, Director, Electronic Communications Networks and Services, DG Connect, European Commission
- Florian Ermacora, Head of Unit, Wholesale Markets: Electricity & Gas, DG Energy, European Commission

8 

High-level events

9 

Private seminars by invitation only

355 

Participants to CERRE events including around,

### Private presentations of our reports to the European Commission, including:

- DG MOVE 'Single European Rail Area' Unit 'Track access charges: reconciling conflicting objectives' 26 April 2018
- DG CNECT 'Demand-side policies to accelerate the transition to ultrafast broadband' 19 April 2019.

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Representatives from the European Commission and Parliament, national ministries and Permanent Representations

## ► Active role in external events, including:

- World Forum of Energy Regulators (Mexico)
- RailTech Track Access Charges Summit 2018 (Amsterdam)
- FLAME 2018 (Amsterdam)
- EU Energy Summit (Brussels)
- EU Sustainable Energy Week (Brussels)
- European Commission Conference on 'The EU's vision for a modern, clean and competitive economy' (Brussels)
- Clingendael International Energy Programme Gas Day 2018 (The Hague)
- Gas Forum (Madrid)
- European Utility Week (Vienna)

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Newsletters

1,000 

Twitter followers,  
a 33% increase

More than 60 

Media mentions across Europe including in POLITICO, Euractiv, L'Echo, La Libre, La Tribune, Contexte



► Bruno Liebhaberg, CERRE's Director General, nominated **Chair of the EU Observatory on the Online Platform Economy**



Centre on Regulation in Europe

📍 Avenue Louise, 475 (box 10)  
1050 Brussels, Belgium

📞 +32 2 230 83 60

✉️ [info@cerre.eu](mailto:info@cerre.eu)

💻 [cerre.eu](http://cerre.eu)

🐦 [@CERRE\\_ThinkTank](https://twitter.com/CERRE_ThinkTank)