

# 2025

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# Annual REPORT



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# I. INTRODUCTION AND ORGANISATIONAL SETUP

The OECD-GVH Regional Centre for Competition in Budapest (RCC) was established in February 2005 by the Organisation for Economic Co-operation and Development (OECD) and the Hungarian Competition Authority (GVH) through a Memorandum of Understanding. **Its main goal is to foster the development of competition law, policy, and culture in South-Eastern Europe and Central Asia, thereby contributing to economic growth and prosperity in these regions.** The RCC aims to provide capacity-building assistance and policy advice through training on competition law for competition enforcement officers. Additionally, the **RCC is committed to further strengthening competition law and policy in Hungary and within the GVH itself.**

It is important to highlight that the RCC is a joint initiative, managed by a senior competition expert at the OECD headquarters in Paris and a coordinator employed by the GVH in Budapest. Therefore, the work of the Centre is based on the combined expertise of both institutions: **the OECD Academic Director is responsible for designing the professional programme of the events and inviting experts, while the GVH provides both the technical background and logistical support.** The founding parties make joint decisions and meet annually to review the operation and performance of the Centre. The GVH is responsible for providing the majority of the financial resources needed for the smooth and successful oper-

ation of the Centre. It also makes an annual voluntary contribution to the OECD to cover the expenses related to the staff position in Paris, while the OECD co-funds the programmes. Additionally, both parties cooperate in their efforts to secure additional financial support from third parties, including the European Commission and national competition authorities.

The Centre has **seventeen beneficiaries, including the competition authorities of Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Kazakhstan, Kosovo,<sup>1</sup> Kyrgyzstan, Moldova, Montenegro, North Macedonia, Romania, Serbia, Ukraine, and Uzbekistan.** Furthermore, participants from the Eurasian Economic Commission were invited to our workshops in 2025. The work targeting these institutions is considered the core activity of the RCC, which has greatly contributed to the development of competition law and culture in these countries. However, the capacity-building needs vary across our beneficiary competition authorities, which necessitates and calls for a broader approach to competition outreach work, including:

- enhancing analytical skills in competition law enforcement,
- drawing the attention of the judiciary to the specificities of competition law adjudication,
- pro-competitive reforms in infrastructure sectors,
- advancing competition advocacy,

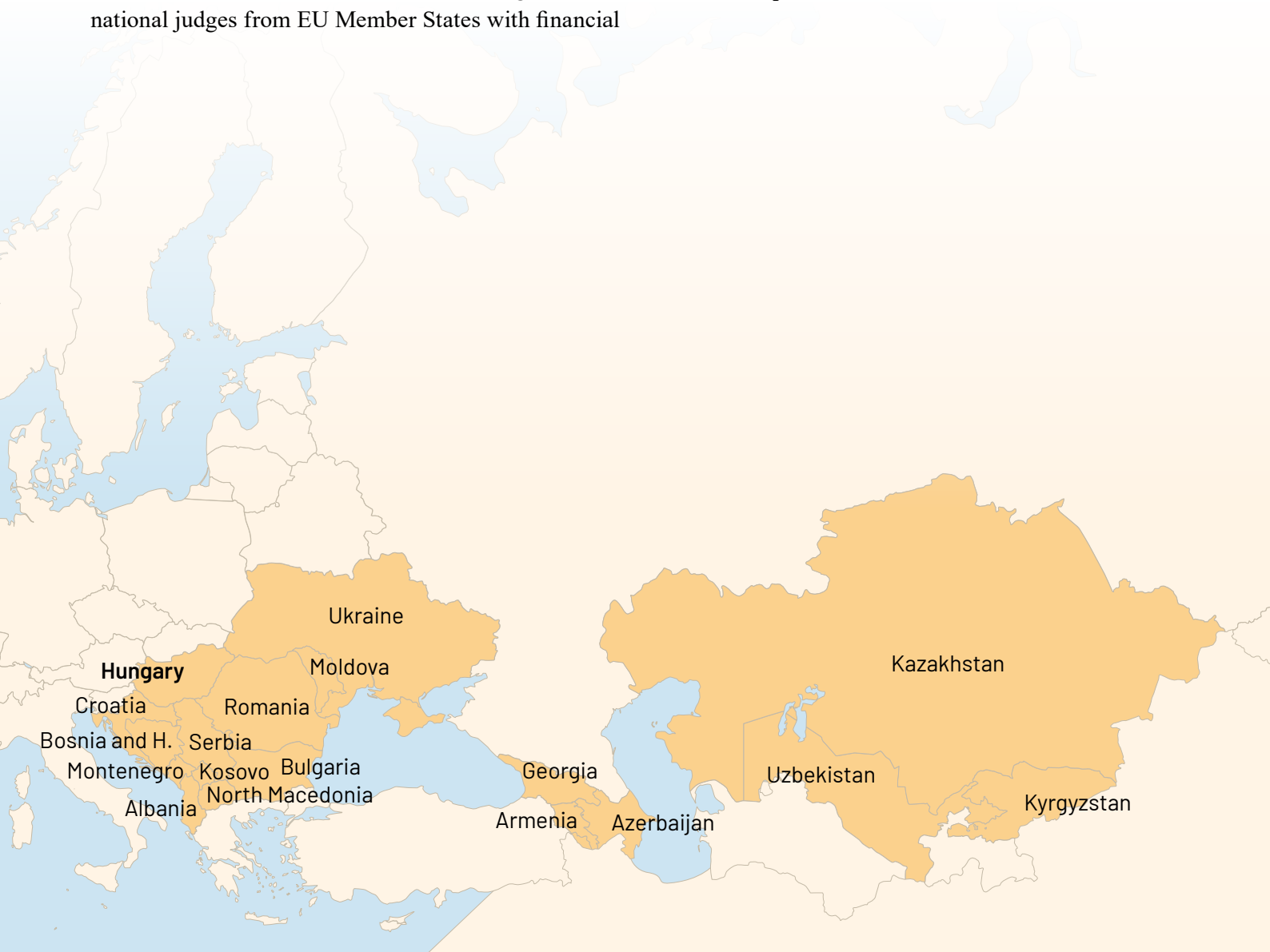
<sup>1</sup> This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the Advisory Opinion of the ICJ on Kosovo's declaration of independence. Hereinafter referred to as Kosovo.

- strengthening relations between competition authorities and sector regulatory agencies,
- supporting legal and institutional reform in the area of competition,
- fostering international co-operation and networking.

**National judges play a key role in the activities of the RCC, making them an important target group for our initiatives.** To this end, a seminar was organised for national judges from EU Member States with financial

support from the European Commission. The seminar offered a valuable opportunity to further enhance judges' understanding of competition law and economics, facilitate the exchange of ideas on recent developments in EU competition law and address key challenges encountered in competition law cases.

Another beneficiary of the RCC's core activities is the GVH itself as the Centre organises an annual workshop for its staff to learn about the latest antitrust theories and enforcement practices.





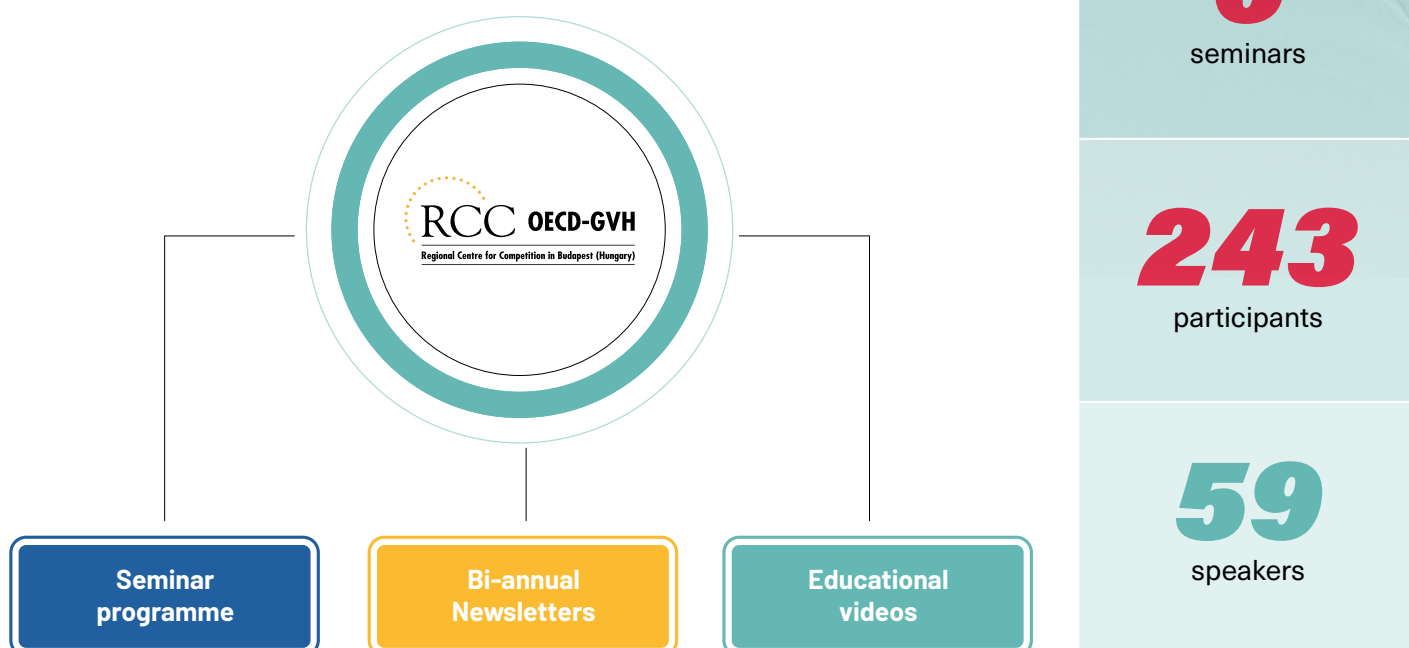
## II. DESCRIPTION OF THE ACTIVITY OF THE RCC



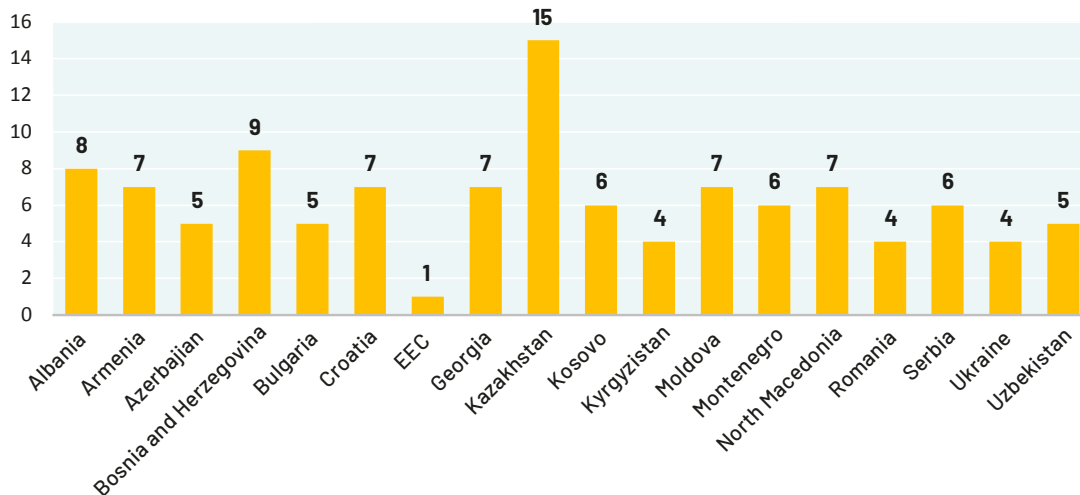
### 1. Seminar programme

#### A. 2025 Seminar Statistics

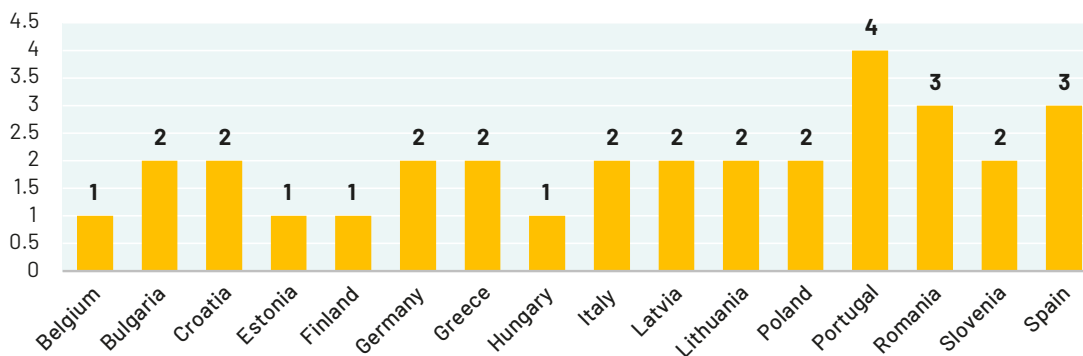
In 2025, the RCC organised **six seminars**, bringing together **243 participants** from **32 institutions**, along with **59 speakers** representing **34 institutions**, as illustrated in the graphs below:



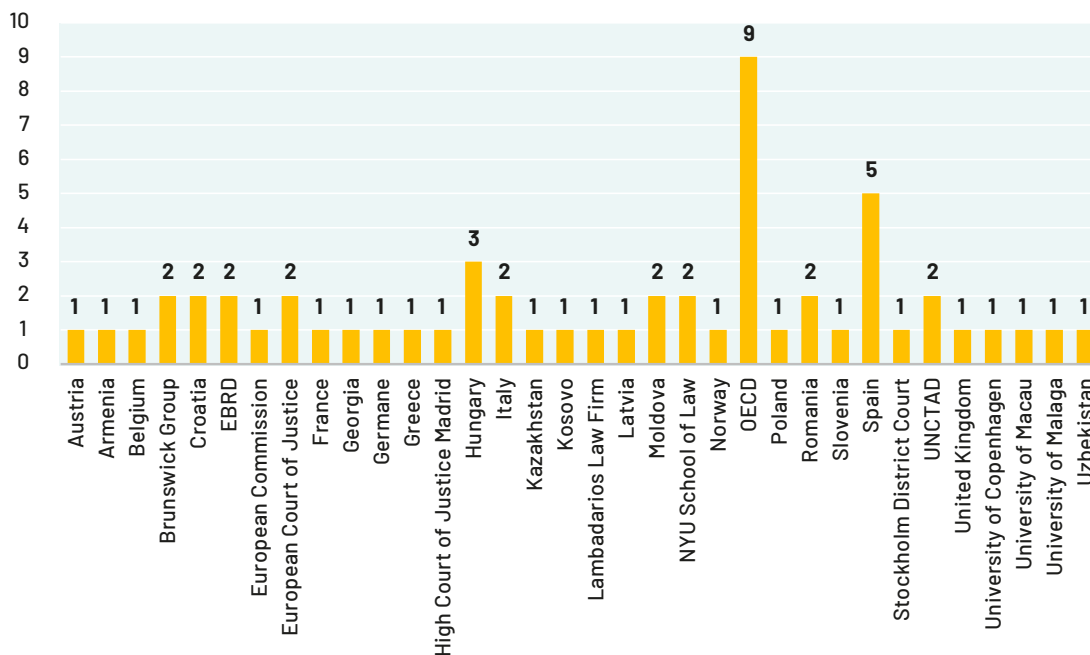
**Chart 1: Total number of participants per beneficiary competition authority in 2025**



**Chart 2: Total number of participating judges per eligible country in 2025**



**Chart 3: Total number of speakers per country/institution in 2025**



## B. Overview of the 2025 Seminars

We provide a **detailed overview of the RCC seminars** and locations of each seminar, along with key figures on held in 2025, including information on the topics, dates participants.

**Table 1: Overview of seminars in 2025**

Topic	Date and location	Figures	Participating institutions
20th Anniversary Conference	27-28 February 2025 Budapest, Hungary	34 participants 19 speakers 12 organisers 2 interpreters	<b>Beneficiaries:</b> Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Hungary Kazakhstan, Kosovo, Kyrgyzstan, Moldova, Montenegro, North Macedonia, Romania, Serbia, Uzbekistan <b>Speakers:</b> Armenia, Austria, Croatia, EBRD, France, Georgia, Germany, Italy, Hungary, Kazakhstan, Kosovo, Moldova, OECD, Poland, Romania, Uzbekistan
RCC Seminar <i>"Tourism, Transport and Competition"</i>	18-20 March 2025 Bilbao, Spain	42 participants 9 speakers 4 organisers 2 interpreters	<b>Beneficiaries:</b> Albania, Armenia, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Kosovo, Kazakhstan, Moldova, Montenegro, North Macedonia, Romania, Serbia, Spain Ukraine, Uzbekistan <b>Speakers:</b> Basque Competition Authority, Croatia, EBRD, Hungary, OECD, Spain, University of Malaga
Competition Lab for Judges <i>"Horizontal Cooperation Agreements"</i>	30-31 May 2025 Budapest, Hungary	32 participants 7 speakers 3 organisers	<b>Beneficiaries:</b> Belgium, Bulgaria, Croatia, Estonia, Finland, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Poland, Portugal, Romania, Slovenia, Spain <b>Speakers:</b> Brunswick Group, European Court of Justice, High Court of Justice Madrid, Lambadarios Law Firm, OECD, Stockholm District Court, University of Copenhagen
GVH Staff Training <i>"Antitrust Platforms and Consumer Welfare: Recent Trends and Enforcement Challenges"</i>	29-30 September 2025 Budapest, Hungary	84 participants 10 speakers 6 organisers	<b>Beneficiaries:</b> GVH staff <b>Speakers:</b> Belgium, Brunswick Group, European Commission, European Court of Justice, NYU School of Law, OECD, Spain, UK, Unctad
Joint Seminar with the Slovenian Competition Protection Agency <i>"When the State Harms Competition: Possible Infringements and Reactions, SOEs and Competitive Neutrality"</i>	4-6 November 2025 Ljubljana, Slovenia	27 participants 8 speakers 2 organisers 2 interpreters	<b>Beneficiaries:</b> Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Kosovo, Kazakhstan, Kyrgyzstan, Moldova, Montenegro, North Macedonia, Serbia, Ukraine <b>Speakers:</b> Italy, Hungary, Latvia, Moldova, NYU School of Law, OECD, Slovenia, University of Macau
Outside Seminar <i>"Building Strong Competition Cases in Traditional Markets"</i>	18-20 November 2025 Almaty, Kazakhstan	24 participants 6 speakers 5 organisers 2 interpreters	<b>Beneficiaries:</b> Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Croatia, Kazakhstan, Kyrgyzstan, Moldova, Montenegro, North Macedonia, Serbia, Romania Uzbekistan <b>Speakers:</b> Greece, Hungary, Norway, OECD, Romania



## C. Comprehensive Review of RCC Seminars

### a. 20th Anniversary of the RCC. Conference Summary: Competition, Liberalisation and Industrial Policy in Europe and Central Asia

#### Seminar objectives

This conference brought together policymakers, regulators, and experts to discuss the evolving landscape of competition policy, market liberalization, and industrial strategies in Europe, the Caucasus, and Central Asia. Discussions focused on how competition fuels economic progress and the role of coordinated liberalization in regional development.

#### **1. Competitive Markets, Thriving Societies: How Competition Fuels Progress**

Participants emphasized that open and competitive markets are essential for innovation, productivity, and long-term economic resilience. Competition was presented as a key mechanism for improving service quality, reducing prices, and fostering entrepreneurship—particularly in economies undergoing transition. Panellists highlighted that competitive markets tend to deliver greater consumer choice and better access to essential goods and services, especially when paired with sound regulatory oversight.

#### **2. Market Liberalization in the European Region**

The session on liberalization explored recent progress in deregulating key sectors such as energy, telecommunications, and transport. In the EU context, liberalization was linked to efforts to deepen the single market, improve cross-border service provision, and increase competitiveness. However, challenges remain due to fragmentation,

administrative barriers, and uneven implementation across member states. Discussions stressed the need for harmonized regulatory frameworks to unlock economies of scale and encourage private investment in infrastructure and innovation.

#### **3. Competition Policy Developments in the Caucasus and Central Asia**

Representatives from the region shared updates on reforms aimed at modernizing competition frameworks. Notably, several countries have introduced new legislation to improve enforcement tools, increase institutional independence, and address anti-competitive practices in digital and traditional markets. Efforts are also underway to strengthen regional cooperation through knowledge exchange, capacity building, and alignment with international best practices. Initiatives supported by the OECD-GVH Regional Centre for Competition and other international partners were cited as key enablers of progress in these areas.

#### **4. Competition and Industrial Policy**

A central theme was the balance between industrial policy and competitive neutrality. While industrial policies—such as subsidies, state aid, or sectoral strategies—can support economic transformation, they must be carefully designed to avoid distorting competition. Participants discussed the importance of transparent frame-

works, competitive public procurement, and effective state aid control mechanisms to ensure that industrial interventions support long-term growth without entrenching inefficiencies or creating market entry barriers.

### 5. Impact on the Region: Competition and Industrial Policy Working Together

Case studies from transport and tourism sectors illustrated how liberalization, when coupled with fair competition, can generate significant spill-over effects across the economy. Regional infrastructure projects were cited for their potential to enhance connectivity and reduce trade costs. Tourism liberalization was noted for driving job creation and small business growth in several economies. Participants emphasized the need for regulatory reform, reduced administrative burden, and cross-border cooperation to maximize the benefits of liberalization in these sectors.

Keynote speakers were Mr. Carmine **Di Noia**, *Director for Financial and Enterprise Affairs at the OECD*; Mr. Benoît **Cœuré**, *President of the Autorité de la concurrence, Chair of the OECD Competition Committee*; Ms. Melis Ekmen **Tabojer**, *Managing Director, Policy Strategy Delivery, EBRD*, and we also counted with the participation as speakers of Mr. Yerlan **Alzhan**, *Deputy Chairman of the Agency for Protection and Development of Competition of the Republic of Kazakhstan*; Mr. Lukas **Cavada**, *Executive Director for International Affairs, Austrian Federal Competition Authority*; Mr. Bogdan-Marius **Chirițoiu**, *President of the Romanian Competition Council*; Mr. Gegham **Gevorgyan**, *Chairman of the State Commission for the Protection of Economic Competition of the Republic of Armenia*; Mr. Alexei **Gherțescu**, *President of the Competition Council of the Republic of Moldova*; Ms. Mirta **Kapural**, *President of the Croatian Competition Agency*; Mr. Asadulla **Kayumov**, *Deputy Chairman of the Competition Promotion and Consumer Protection Committee of the Republic of Uzbekistan*; Mr. Irakli **Lekvinadze**, *President of the Georgian Competition and Consumer Agency*; Mr. Daniel **Mańkowski**, *Vice-President of the Polish Office of Competition and Consumer Protection*; Mr. Albion **Rexhepi**, *Head of Prohibited Agreements Division, Kosovo Competition Authority*.

### Conclusion

The conference highlighted that well-functioning competition policy, aligned with liberalization and targeted industrial strategies, is vital for sustainable development in the region. Strengthened enforcement, policy coherence, and regional dialogue are essential to ensuring that markets remain open, inclusive, and growth oriented.



## Agenda

28 February 2024 (Friday)	
09.00–09.15	<b>Welcome and Registration</b>
09.15–10.15	<p><b>Opening remarks</b>            Mr. Bence <b>Gerlaki</b>, <i>State Secretary, Ministry for National Economy of Hungary</i>            Mr. Csaba Balázs <b>Rigó</b>, <i>President of the Hungarian Competition Authority</i></p> <p><b>20 years of our RCC in Five minutes: Our video commemoration</b></p> <p><b>Keynote Speeches:</b>  <b>Competitive Markets, Thriving Societies: How Competition Fuels Progress</b>            Mr. Carmine <b>Di Noia</b>, <i>Director for Financial and Enterprise Affairs at the OECD</i>  <b>Promoting competition in Eastern Europe, Caucasus and Central Asia.</b>  <b>The cooperation between EBRD and OECD (ONLINE)</b>            Ms. Melis Ekmen <b>Tabojer</b>, <i>Managing Director, Policy Strategy Delivery, EBRD</i></p>
10.15–11.00	<p><b>Roundtable on MARKET Liberalization in the European Region</b>            Ms. María Pilar <b>Canedo</b>, <i>Academic Director of the RCC, OECD</i>            Mr. Lukas <b>Cavada</b>, <i>Executive Director for International Affairs, Austrian Federal Competition Authority</i>            Mr. Bogdan–Marius <b>Chirițoiu</b>, <i>President of the Romanian Competition Council</i>            Mr. Albion <b>Rexhepi</b>, <i>Head of Prohibited Agreements Division, Kosovo Competition Authority*</i></p>
11.00–11.15	<b>Coffee Break</b>
11.15–12.00	<p><b>Roundtable on Competition policy developments in the Caucasus and Central Asia</b>            Mr. Yerlan <b>Alzhan</b>, <i>Deputy Chairman of the Agency for Protection and Development of Competition of the Republic of Kazakhstan</i>            Mr. Gegham <b>Gevorgyan</b>, <i>Chairman of the State Commission for the Protection of Economic Competition of the Republic of Armenia</i>            Mr. Irakli <b>Lekvinadze</b>, <i>President of the Georgian Competition and Consumer Agency</i>            Mr. Asadulla <b>Kayumov</b>, <i>Deputy Chairman of the Competition Promotion and Consumer Protection Committee of the Republic of Uzbekistan</i>            Moderated by Ms. Sabine <b>Zigelski</b>, <i>Senior Case Manager, Bundeskartellamt</i></p>
12.00–13.30	<b>Lunch break</b>
13.30–14.45	<p><b>Competition and Industrial Policy</b>  <b>Keynote speech:</b>            Mr. Benoît <b>Cœuré</b>, <i>President of the Autorité de la concurrence</i></p> <p><b>Fireside chat: The impact Of Competition and Industrial policy in the Region</b>            Mr. Alexei <b>Gherțescu</b>, <i>President of the Competition Council of the Republic of Moldova</i>            Mr. Daniel <b>Mańkowski</b>, <i>Vice–President of the Polish Office of Competition and Consumer Protection</i>            Ms. María Pilar <b>Canedo</b>, <i>Academic Director of the RCC, OECD</i>            Moderated by Mr. Renato <b>Ferrandi</b>, <i>Director of International and EU Affairs, Italian Competition Authority</i></p>
14.45–15.00	<b>Coffee break</b>
15.00–16.45	<p><b>THE FUTURE OF THE RCC IN THE FACE OF THE CURRENT CHALLENGES:</b>            Ms. María Pilar <b>Canedo</b>, <i>Academic Director of the RCC, OECD</i>            Ms. Mirta <b>Kapural</b>, <i>President of the Croatian Competition Agency</i></p> <p><b>Sharing our legacy</b>            Each beneficiary sharing their challenges and achievements</p>
16.45–17.00	<p><b>Presentation of the Video on Competitive neutrality as the new edition of the Series “Key competition topics explained in a few minutes”</b></p> <p><b>Presentation of the Newsletter on Bid rigging</b></p> <p><b>Final remarks</b>            Mr. Ori <b>Schwartz</b>, <i>Head of the OECD Competition Division</i></p>
17.00–19.00	<b>Cocktail Reception</b>



## b. Competition, Tourism and Transport – Evidence, Advocacy and Industrial Policy

### Seminar objectives

This conference explored the intersections between **competition, tourism, transport, and industrial policy**, showcasing how regulatory assessment, enforcement, and advocacy can drive reform in emerging European and Central Asian markets.

#### 1. *Advocacy of Competition and Principles of Better Regulation*

A workshop detailed how competition authorities engage in regulatory advocacy, using both formal and informal tools to ensure competitive neutrality in state-supported sectors. Tools include legislative opinions, advisory interventions, and ex post impact studies of state support measures. Participants emphasised the OECD Competitive Neutrality Toolkit as an important resource in supporting effective advocacy.

#### 2. *OECD Study on Tourism in Tunisia – An Example of the Competition Assessment Toolkit*

Drawing from the recent OECD Competition Assessment Review: Tunisia (2023), sessions illustrated how the Toolkit was applied to analyse the tourism sector—identifying regulation-driven barriers and formulating 351 targeted recommendations. Estimates suggest implementation could yield benefits equivalent to 1.2% of Tunisia's

2018 GDP. Key regulatory burdens included licensing requirements, zoning restrictions, capital thresholds, and discriminatory professional rules. These recommendations were structured through the Toolkit's methodology and stakeholder engagement approach.

#### 3. *María Pilar Canedo, Director of the OECDGVH Regional Centre for Competition*

María Pilar **Canedo** (*Senior Competition Expert, OECD Competition Division*) presented the Centre's broader role in delivering capacity building and competition law enforcement across Eastern Europe and Central Asia. Her contributions emphasised the dissemination of the Toolkit methodology and the promotion of evidence-based advocacy and regional cooperation.

#### 4. *Introduction to Competition in the Transport Sector – Two Abuse of Dominance Cases from GVH*

Máté **Stáber** (*Case handler, GVH*) outlined the application of competition analysis in Hungary's transport sector, citing two significant abuse of dominance investigations by the National Competition Authority (GVH). These cases serve as illustrative examples of how enforcement in transport can promote fairness and market access for new entrants.

## 5. Transport Enforcement: Agreements and Abuse of Dominance – Renfe Operadora Case (Spain)

Francisco **Roig** (*Case handler, CNMC, Spain*) offered a detailed review of a case involving Renfe Operadora, Spain’s state railway operator. The case demonstrated how regulators handle complex abuse of dominance and collusion issues in public transport markets.

## 6. Bus Sector in Spain – Advocacy Study and Impact Assessment

Renata **Sánchez de Lollano** (*Trade Expert, CNMC*) shared findings from a recent advocacy study into the Spanish bus sector. She discussed the impact assessment supporting reforms designed to liberalise market access, reduce entry barriers, and improve service quality.

## 7. Competition in Tourism – The Booking Case in Spain

Francisco **Roig** provided an overview of competition issues in tourism, focusing on the Booking.com case in Spain, which highlighted restrictive parity clauses and their impact on pricing and consumer choice.

## 8. Broad View of Competition’s Effect on Tourism

Eugenio **Olmedo** (*Professor of Commercial Law, University of Malaga*) expanded the discussion with a wider perspective on how competition regulation shapes the tourism sector, influencing price transparency, provider diversity, and regulatory frameworks.

## 9. Accommodation-Platform Regulation – Case Handler Perspectives

Estibaliz **Albizua** (*Case handler, Basque Competition Authority, AVC*) discussed the Authority’s interventions in the touristic apartment market. Máté Stáber then presented the GVH’s inquiry into online accommodation platforms—specifically addressing price parity clauses, search ranking practices, and complaints mechanisms.

## 10. Housing, Land, and Competition – Advocacy Report

Renata **Sánchez de Lollano** discussed an advocacy report examining the intersection of housing regulation

and tourism competition. The report focused on zoning rules, land use restrictions, and pricing controls that affect short-term accommodation markets.

## 11. Regulation in Transport – Competition and Public Policy

Ducan **Kernohan** (*Associate Director, Sector Reforms Team, EBRD*) discussed how transport-related regulations serve broader public-policy goals, such as infrastructure planning and social service provision. He emphasised the importance of aligning transport regulation with competition principles while achieving public objectives.

## 12. The Croatian Perspective in Tourism and Transport – Two Case Studies

Mirta **Kapural** (*President of the Croatian Competition Agency, AZTN*) presented two emblematic cases: the Eagle Hills–Sunčani hotel investment, and Dubrovnik’s taxi-regulation reforms. Both illustrated the complexity of balancing local regulatory interests, public service provision, and competition policy enforcement.

### Key Takeaways:

- **Assessment Tools & Advocacy:** The OECD Toolkit and Competitive Neutrality approaches are effective in revealing and eliminating regulatory distortions.
- **Sectoral Enforcement:** Abuse of dominance and anti-competitive agreements are key concerns in transport and tourism sectors; targeted enforcement drives reform.
- **Industrial Policy Alignment:** Coordinated industrial strategies must preserve competitive neutrality to foster market openness and innovation.
- **Regional Integration & Learning:** Authorities across European, Caucasus, and Central Asian regions benefit from sharing best practices in regulatory audits, enforcement, and liberalization.

This event underscored how applying structured regulatory assessment, evidence-based advocacy, and cross-sector enforcement can create more open, equitable, and growth-oriented markets in transport and tourism sectors.

## Agenda

### 18 March 2025 (Tuesday)

09.15-10.00	<p><b>WELCOME TO OUR OECD-GVH RCC SEMINAR</b>  <i>María Pilar Canedo, Director of the OECD-GVH Regional Centre for Competition</i>  <i>Attila Sipos, Secretary General of the Hungarian Competition Authority</i>  <i>José Ramón Intxaurbe, Dean of the Law School of the University of Deusto</i>  <i>Ainara Herce, President of the Basque Competition Authority (AVC)</i></p> <p><b>OPENING REMARKS. HOW COMPETITION AUTHORITIES DEAL WITH DIGITAL PLATFORMS</b>  <i>Caní Fernandez, President of the Spanish National Commission on Markets and Competition (CNMC)</i></p> <p><b>TOUR DE TABLE AND FAMILY PICTURE</b></p>
10.00-10.45	<p><b>Advocacy of Competition and the Principles of Better Regulation</b>  <b>OECD Study on Tourism in Tunisia. An example of the use of the OECD Competition Assessment Toolkit</b>  <i>María Pilar Canedo, Director of the OECD-GVH Regional Centre for Competition (RCC)</i></p>
10.45-11.15	<b>Coffee break</b>
11.15-12.00	<p><b>An Introduction to Competition in the Transport Sector.</b>  <b>Special reference to two Abuse of dominance cases of the GVH</b>  <i>Máté Stáber, Case handler at the Hungarian Competition Authority (GVH)</i></p>
12.00-13.15	<b>Lunch break</b>
13.15-14.00	<p><b>Transport from an Enforcement Perspective. Putting Together Agreements and Abuse of Dominance. Renfe operadora Case in Spain</b>  <i>Francisco Roig, Case handler at the Spanish National Commission on Markets and Competition (CNMC)</i></p>
14.00-14.45	<p><b>The Bus Sector in Spain. An Advocacy Study and its Impact Assessment</b>  <i>Renata Sánchez de Lollano, Trade Expert and State Economist at the Spanish National Commission on Markets and Competition (CNMC)</i></p>
14.45-15.30	<p><b>An Introduction to Competition in the Tourism Sector. Special reference to the Booking case in Spain</b>  <i>Francisco Roig, Case handler at the Spanish National Commission on Markets and Competition (CNMC)</i></p>
15.30-15.45	<b>Coffee break</b>
15.45-17.30	<b>Hypothetical Case 1</b>
18.00-20.00	<p><b>Cocktail at the University of Deusto offered by the Basque Competition Authority</b>  <b>Optional: Visit to the Auditorium, Lecture Hall and Chapels of the University</b></p>

### 19 March 2025 (Wednesday)

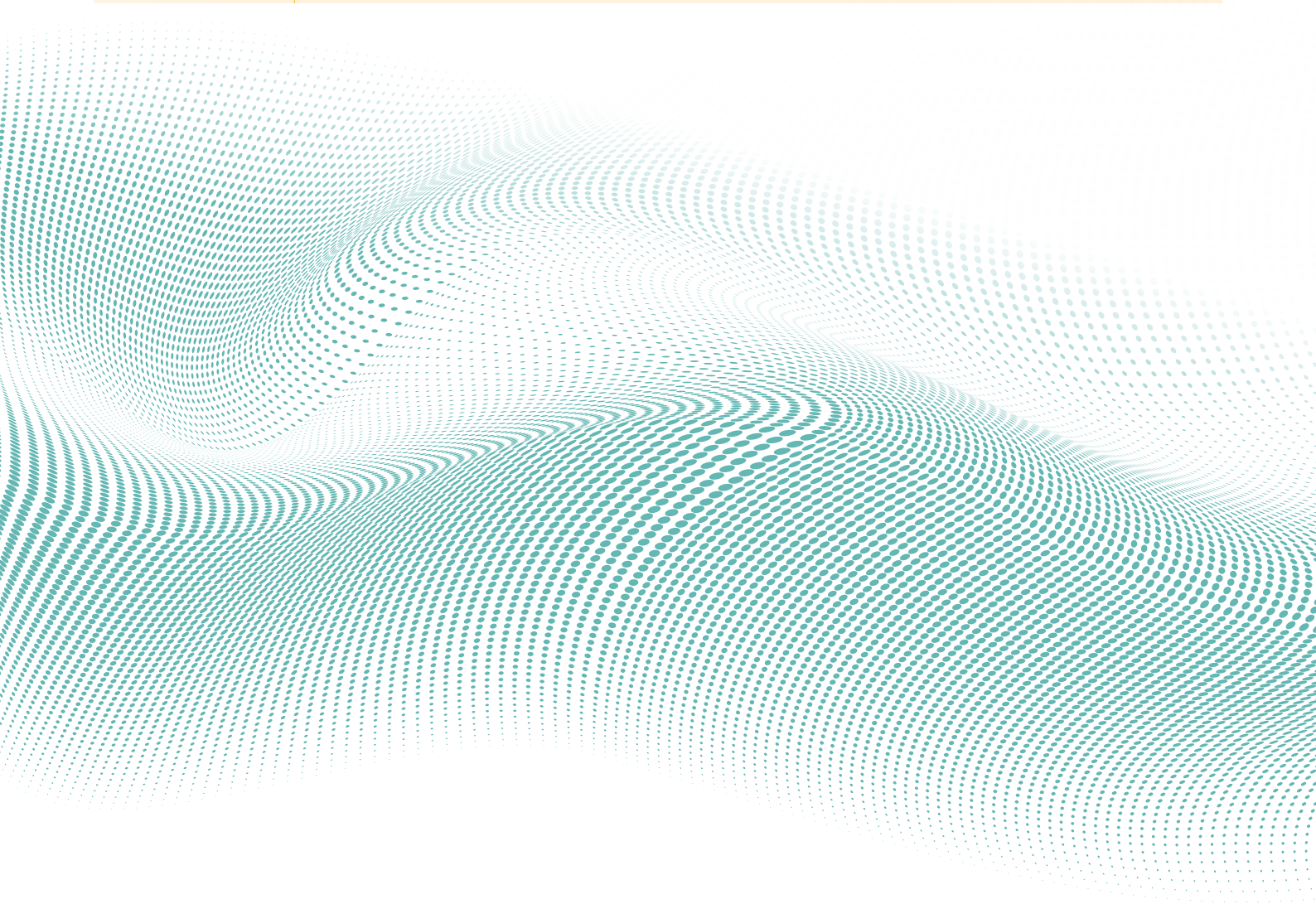
09.30-10.15	<p><b>A Broad View of How Competition Affects the Tourism Sector</b>  <i>Eugenio Olmedo, Professor of Commercial Law at the University of Malaga</i></p> <p><b>The Basque Competition Authority's Activity in the Field of Touristic Apartments</b>  <i>Estibaliz Albizua, Case handler at the Basque Competition Authority (AVC)</i></p>
10.15-11.00	<p><b>GVH sector inquiries on domestic online accommodation booking and service market (such as price parity clauses, ranking of search results and complaints mechanism of accommodation intermediary platforms)</b>  <i>Máté Stáber, Case handler at the Hungarian Competition Authority (GVH)</i></p>
11.00-11.15	<b>Coffee break</b>
11.15-12.00	<p><b>Digital markets, Tourism and Competition</b>  <i>Eugenio Olmedo, Professor of Commercial Law at the University of Malaga</i></p>
12.00-13.30	<b>Lunch break</b>
13.30-14.30	<p><b>Land, Housing and Competition. An Advocacy Report</b>  <i>Renata Sánchez de Lollano, Trade Expert and State Economist at the Spanish National Commission on Markets and Competition (CNMC)</i></p>
14.30-15.00	<b>Coffee break</b>

### 19 March 2025 (Wednesday)

15.00–16.45	<b>Hypothetical Case 2</b>
17.30–19.00	<b>Optional: Visit to the Guggenheim Museum</b>
20.00–21.00	<b>Dinner</b>

### 20 March 2025 (Thursday)

09.30–11.30	<b>UK Competition and Regulatory policy in Transport (and airports case study)</b> Duncan <b>Kernoan</b> , <i>Associate Director, Sector Reforms Team, EBRD</i>
11.30–11.45	<b>Coffee break</b>
11.45–12.45	<b>Closing Session</b> <b>The Croatian Perspective of Competition in Tourism and Transport through Two Main Cases</b> Eagle Hills–Sunčani and the Opinion on the Regulation of the Provision of Taxi Services by Local Administration of Dubrovnik Mirta <b>Kapural</b> , <i>President of the Croatian Competition Agency (AZTN)</i>
12.45–13.30	<b>Final remarks and Kahoot game</b> <b>Delivery of certificates</b>
13.30–15.00	<b>Final lunch</b>
15.00–18.00	<b>Optional: Trip to the Cantabrian Sea</b>
20.00–21.00	<b>Dinner</b>





## c. Competition Lab for Judges: Stepping Up with Competition Law Enforcement – Cooperation Agreements between Competitors

### Seminar objectives



The **Competition Lab for Judges**, held on 29-30 May 2025 in Budapest under the OECDGVH Regional Centre for Competition and co-funded by the EU, focused on the complexities of **horizontal cooperation agreements** between competitors. The seminar offered national and apprentice judges from the EU, Kosovo, Montenegro, and North Macedonia a comprehensive, case-based exploration of collaboration between peers.

#### Analytical Framework & Core Issues

- **Competition Agreements Between Competitors:** Led by Pál Csiszár (*Senior Advisor, Brunswick Group*), the session explored EU case law, including the concepts of undertakings, joint ventures, and the ancillary restraints doctrine (e.g. *Meca-Medina, Superleague*).
- **Restrictions by Object and Effect:** Tihamér Tóth (*Judge, Court of Justice of the European Union*) delved into jurisprudence such as *Allianz, Cartes Bancaires*, and *European Superleague* to guide evaluation frameworks.
- **Exemption Conditions:** Lefkothea Nteka (*Partner, Lambadarios Law Firm*) assessed conditions under Article 101(3) TFEU and horizontal guidelines, stressing economic and non-economic benefits.
- **Information Exchange:** Mercedes Pedraz (*Judge, High Court of Justice Madrid*) covered anti-competitive information-sharing practices, including hub-and-spoke and data pools, supported by cases like *John Deere, Asnef-Equifax*, and the EU e-book case.

#### Sectoral and Case-Specific Modules

- **Purchasing & Subcontracting Agreements:** Daniel Severinsson (*Judge, Stockholm Patent & Market Court*) provided analytical and practical insights into buyer cartels versus joint purchasing.
- **Other Forms of Cooperation:** Christian Bergqvist (*Associate Professor at University of Copenhagen & Senior Fellow at GWU*) scrutinized the fine line between lawful collaboration and cartels in joint bids, marketing, non-compete clauses, and IP settlements.
- **Specialized Agreements:** María Pilar Canedo (*Senior Competition Expert, OECD Competition Division*) examined joint bids, food-chain supply, sustainability, industrial innovation, and green-economy agreements.

#### Methodology & Format

The seminar combined expert-led analytical sessions with **hands-on hypothetical case exercises**, encouraging active participation and peer learning. Each day concluded with logistical sessions fostering informal exchange and networking.

#### Key Takeaways

1. A **robust analytical framework** is critical to discern permissible cooperation from illicit collusion.
2. EU case law provides clear guidance on object/effect assessments, exemptions, and information exchanges.
3. Practical scenarios reinforce the application of legal principles to industry-specific contexts like procurement, sustainability, and innovation.
4. Peer interaction and judicial dialogue support a consistent, informed approach to competition law enforcement across jurisdictions.

## Agenda

### Thursday, 29 May 2025

09.30–10.00	<b>Welcome remarks, Group photo</b>
10.00–10.15	<b>Questionnaire exercise – What do you know?</b>
10.15–11.15	<b>Cooperation agreements between competitors – Analytical framework</b> <i>Pál Csiszár, Senior Advisor, Brunswick Group</i>
11.15–11.30	<b>Coffee break</b>
11.30–12.30	<b>Restrictions of competition by object and effect – Analytical framework</b> <i>Tihamér Tóth, Judge, Court of Justice of the European Union</i>
12.30–14.00	<b>Lunch</b>
14.00–15.00	<b>Exemption of horizontal cooperation agreements – Analytical framework</b> <i>Lefkothea Nteka, Partner, Lambadarios Law Firm</i>
15.00–15.15	<b>Coffee Break</b>
15.15–16.15	<b>Exchange of information – Analytical framework and case examples</b> <i>Mercedes Pedraz, Judge, High Court of Justice Madrid</i>
16.15–17.30	<b>Hypothetical Case Exercise</b>
19.00–22.00	<b>Welcome dinner</b>

### Friday, 30 May 2025

09.30–10.30	<b>Purchasing agreements and subcontracting arrangements – Analytical framework and case examples</b> <i>Daniel Severinsson, Judge at Patent and Market Court, Stockholm District Court</i>
10.30–10.45	<b>Coffee break</b>
10.45–12.00	<b>To be or not to be a cartel? Other cases of (non)–permissible cooperation between competitors – Analytical framework and case examples</b> <i>Christian Bergqvist, Associate Professor, University of Copenhagen and Senior Fellow, GW Competition and Innovation Lab, George Washington University</i>
12.00–13.15	<b>Hypothetical Case Exercise</b>
13.15–14.15	<b>Lunch</b>
14.15–15.15	<b>Agreements in specific areas: joint bids, food supply chain, sustainability, industrial policy and innovation agreements – Analytical framework and case examples</b> <i>María Pilar Canedo, Senior Competition Expert, OECD</i>
15.15–15.30	<b>Coffee break</b>
15.30–16.45	<b>Hypothetical Case Exercise</b>
16.45–17.15	<b>Kahoot game!</b>
17.15–17.30	<b>Questionnaire exercise – What do you know now?</b>



#### d. Antitrust, Platforms and Consumer Welfare: Recent Trends and Enforcement Challenges

##### Seminar objectives

This year's GVH annual training focused on the practical analysis of cases and the evolving rules that govern digital markets. Designed to deepen enforcement capability across legal and economic teams, the program brought together distinguished speakers who shared concrete methodologies, case-based reflections, and technology-informed approaches to evidence gathering. **The aim was to consolidate shared standards of good practice while equipping participants to address the particular challenges of data-driven markets, platform dynamics, and rapidly changing investigative techniques.**

Alfredos **Theodorakopoulos** (*Référéndaire, European Court of Justice*) led a substantive exploration of procedural aspects of competition law through real cases, grounding the discussion in day-to-day enforcement tools. The session examined how authorities structure and scope requests for information to secure complete, reliable, and proportionate responses; how to plan and execute dawn raids with due respect for legal privilege, confidentiality, and data protection; and how to handle increasingly digital evidence (email, chat, cloud archives, and forensic images) while preserving chain of custody. **Particular attention was paid to defensible decision-making, from record-keeping to the articulation of reasoning, and to the balance between investigative efficiency and procedural fairness when timelines are tight, and markets move quickly.**

Griet **Jans** (*Chief Economist, Belgian Competition Authority*) then offered an economic perspective on Belgian infringement cases, using them to illustrate robust analytical frameworks that travel well across jurisdictions. The discussion drew out how market definition

and competitive assessment can be adapted to multisided, data-rich environments; how counterfactuals and theory of harm guide the choice of evidence; and how quantitative tools – screening indicators, demand estimation, switching analyses, and profitability tests – complement qualitative proofs such as internal documents and customer testimony. **The session emphasized the importance of clear identification strategy, sensitivity testing, and transparent communication of economic results so that legal conclusions rest on reliable and comprehensible foundations.**

Pál **Csiszár** (*Senior Advisor, Brunswick Group*) followed with an informal postmortem on the Commission's Illumination/Grail merger case, reflecting on its lessons for future merger control. The presentation considered how jurisdictional pathways and referral policies interact with innovative, fast-moving markets; how innovation and pipeline concerns can be framed where direct overlaps are limited; and how effective remedies, timing, and procedural management influence outcomes in transactions with complex data, diagnostics, or platform components. **The broader takeaway was a renewed focus on early evidence planning, disciplined engagement with parties on remedy scope and verifiability, and the need to align procedural strategy with dynamic theories of harm.**

Andrew **Hadley** (*Acting Director, Policy and International, CMA*) and Valentina **Rivas** (*Programme Management Officer, UNCTAD*) concluded the main session with a deep dive into hyper-engaging dark patterns and the digital tools used to collect evidence, including web scraping. They examined how interface design can steer

consumer choice, impede switching, or obscure material information, and how such practices can be identified and measured through user-journey mapping, controlled comparisons, and time-stamped captures. The technical segment walked through defensible scraping protocols – defining the crawl, documenting selectors and update cycles, ensuring reproducibility, and validating data integrity—together with the legal and ethical boundaries that govern automated collection. **The discussion highlighted how well-structured digital evidence can illuminate both consumer harm and the competitive significance of design choices at scale.**

The program concluded with a keynote by Professor Eleanor Fox (*Emeritus, NYU*), who addressed “When the State Harms Competition – The Role for Competition Law”. **She explored how state measures – ranging from selective advantages and regulatory barriers to state ownership and procurement favoritism – can distort market entry, tilt the playing field, or entrench incumbency.** Drawing on comparative experience, the keynote discussed the complementary roles of enforcement, advocacy, and market studies, and showed how cooperation

with sectoral regulators and transparent principles can mitigate distortions while preserving legitimate public interest objectives.

Overall, the training strengthened GVH’s practical toolkit for digital-era enforcement. Participants left with clearer benchmarks for proportionate procedure, a shared economic playbook for robust effects analysis, a sharper understanding of merger control in innovation-driven markets, and hands-on techniques for collecting and validating online evidence. The cross-disciplinary dialogue underscored three enduring take-aways: design evidence early and document it rigorously; make economic reasoning transparent and testable; and integrate legal, economic, and technical perspectives to keep pace with digital markets.

We warmly thank all our speakers – Alfredos Theodorakopoulos, Griet Jans, Pál Csiszár, Andrew Hadley, Valentina Rivas, and Eleanor Fox – for sharing their expertise and contributing to a rich and highly practical annual training for GVH.

## Agenda

Monday, 29 September 2025	
09.30–09.45	<b>Welcome and opening remarks</b> Csaba Balázs Rigó, <i>President of the Hungarian Competition Authority</i> María Pilar Canedo, <i>Coordinator of the OECD-GVH Regional Centre for Competition</i>
09.45–10.30	<b>Competition and Consumer Protection</b> Teresa Moreira, <i>Head of the Competition and Consumer Policies Branch, UNCTAD</i>
10.30–10.45	<b>Coffee break</b>
10.45–11.30	<b>How DMA is evolving. Main challenges and developments</b> Patricia Sánchez-Calero Barco, <i>Case Handler, European Commission DG COMP</i>
11.30–12.15	<b>Addictive design: Regulating design</b> Andrew Hadley, <i>Acting Director, Policy and International, CMA</i>
12.15–13.45	<b>Lunch</b>
13.45–14.30	<b>Commitments, Remedies in mergers and antitrust – when is it a win-win?</b> Pál Csiszár, <i>Senior Advisor at the Brunswick Group</i>
14.30–15.00	<b>How competition agencies deal with regulated sectors</b> Griet Jans, <i>Chief Economist, Belgian Competition Authority</i>
15.00–15.15	<b>Coffee break</b>
15.15–16.00	<b>Recent case law of the ECJ on cartels. Substance and procedure</b> Alfredos Theodorakopoulos, <i>Référéndaire, European Court of Justice</i>
16.00–16.15	<b>Closing remarks</b>

Tuesday, 30 September 2025				
Workshops and conversations on competition				
	Workshop 1	Workshop 2	Workshop 3	Consumer Protection
10.00-12.30	Self-preferencing practices. Enforcement and new challenges	The Towercast Case and follow ups. Legal and economic perspectives	Cartel cases in the Spanish National Commission for Markets and Competition	Green/environmental claims & AI and sustainability
	Patricia Sánchez Calero	Griet Jans and Alfredos Theodorakopoulos	Maria Pilar Canedo and Adrián Sánchez Andrés	Andrew Hadley and Valentina Rivas
12.30-13.30	<b>Lunch break</b>			
	Workshop 1	Workshop 2	Workshop 3	Consumer Protection
13.30-15.00	Procedural aspects of competition law through cases RFI, dawn raids	Understanding Belgian infringement cases from an economic perspective	The many lessons learnt from the Commission's Illumina/Grail merger case - an informal postmortem	Hyper-engaging dark patterns & Tools used to collect data and evidence - Web scraping tools
	Alfredos Theodorakopoulos	Griet Jans	Pál Csiszár	Andrew Hadley and Valentina Rivas
15.00-15.30	<b>Key-note speech: When the State Harms Competition - The Role for Competition Law</b> Eleanor Fox, Emerita, NYU School of Law (online presentation)			





## e. When the State Harms Competition: Possible Infringements and Reactions, SOEs and Competitive Neutrality

### Seminar objectives

The high-level seminar held in **Ljubljana, Slovenia (4-6 November 2025)** explored the **complex role of the State in competition enforcement**. Through case discussions and expert insights, it addressed situations in which public authorities or State-owned enterprises (SOEs) may distort competition, whether intentionally or through regulatory design. The program examined legal frameworks, recent case law, and policy tools available to remedy such distortions at national and international levels, including competitive neutrality – the principle of ensuring that public and private market actors compete on equal terms without undue advantages derived from ownership, regulation, or financing.

The event opened with remarks by Andrej **Matvoz** (*President of the Slovenian Competition Protection Agency*), Attila **Sipos** (*Secretary General, Hungarian Competition Authority*), and María Pilar **Canedo** (*Senior Competition Expert, OECD Competition Division*), which framed the seminar's objectives: to strengthen institutional capability, to share comparative practice, and to build a pragmatic toolkit for addressing state-related restrictions on rivalry. Matvoz followed with a keynote that situated the enforcement and advocacy tasks of competition authorities within broader public-policy ecosystems. He emphasized transparent, principled decision-making, the importance of inter-institutional cooperation, and the need for predictable processes when competition concerns intersect with legitimate public-interest aims.

María Pilar **Canedo** subsequently introduced how authorities can react “When the State Harms Competition,” outlining pathways that range from enforcement against exclusionary rules or conduct to structured advo-

cacy, market studies, and dialogue with regulators. She highlighted the value of diagnosing whether the source of restriction lies in law, policy, ownership, or behavior, and of tailoring instruments – investigations, recommendations, or reforms – accordingly. Building on this foundation, Renato **Ferrandi** (*Head of International and European Affairs, Italian Competition Authority*) examined how regulation can be addressed through advocacy. He presented practical methodologies for identifying disproportionate barriers, designing evidence-based proposals for reform, and sequencing engagement so that competition considerations become integral to regulatory impact assessments. Ferrandi also discussed fostering competition in public services delivered to municipalities, illustrating how tender design, performance-based contracts, and a clear separation between purchaser and provider functions can attract entry, stimulate innovation, and secure cost-effective outcomes while preserving service quality and social objectives.

Professor Eleanor **Fox** (*Emeritus, NYU*) delivered a keynote on “When the State Harms Competition – The Role for Competition Law.” She explored how state measures – such as selective advantages, opaque licensing regimes, exclusive rights, or regulatory asymmetries – can tilt markets and entrench incumbents. **The keynote underscored the complementary roles of enforcement, advocacy, and judicial review; the importance of transparency and reason-giving in public decision-making; and the value of comparative learning for mixed economies in which public and private provision coexist.**

Analytical questions specific to SOEs were taken up by Alexandr **Svetlicinii** (*Associate Professor of Global Legal*

*Studies, University of Macau*), who explained how to determine whether multiple SOEs form a “single economic unit” for merger control and how to assess the competitive incentives of SOEs in concentrations. He discussed indicia of unity – common control, strategic alignment, cross-subsidization, and coordinated decision-making – and emphasized probing actual governance arrangements, budget constraints, and commercial objectives beyond formal ownership labels. **His sessions showed why incentive analysis must account for soft budget constraints, public service mandates, and non-commercial goals that can shape competitive conduct and merger effects.**

Addressing the delicate “State vs. itself” dynamic, Alexei **Gherțescu** (*former President of the Competition Council of the Republic of Moldova*) examined how competition authorities investigate anticompetitive actions by other public bodies while maintaining constructive institutional relationships. He outlined frameworks for asserting jurisdiction, managing conflicts of competence, and combining resolute enforcement against market-restricting measures with proactive advocacy to recalibrate rules that unnecessarily foreclose competition. Gherțescu later returned to the theme of balancing advocacy, enforcement, and respect for the prerogatives of policymakers, offering practical techniques that build trust without diluting the authority’s mandate.

The seminar also reviewed cases of state involvement in competition matters in Hungary, with contributions from Zoltán Nándor **Ay** (*Member of the Competition Council, Hungarian Competition Authority*). The discussion highlighted how to disentangle legitimate public-interest objectives from measures that unduly restrict competition, the evidentiary value of internal documents and market outcomes, and the role of proportionality analysis to ensure that interventions are necessary and minimally distortive. Complementing these enforcement perspectives, María Pilar **Canedo** (*Senior Competition Expert, OECD Competition Division*) addressed why public administrations rarely seek damages for competition infringements, identifying legal, institutional, and practical barriers – from attribution and causation challenges to litigation incentives and budgetary constraints – and proposed ways to align incentives so that deterrence and restitution are more effectively achieved.

Competitive neutrality was explored in depth by Antis **Apsītis** (*Head of the Competition Promotion Department, Competition Council of the Republic of Latvia*), who presented Latvia’s framework and the assessment procedure for public bodies’ participation in capital companies. He explained how neutrality principles aim to remove undue advantages – tax privileges, preferential financing, regulatory exemptions – and **ensure that commercial activities by public entities operate on equal terms with private operators through transparent governance, cost-reflective pricing, and arm’s-length separation.** Apsītis detailed procedural safeguards that help identify potential distortions *ex ante* and support corrective measures before market harm materializes.

Throughout the program, participants worked through two hypothetical cases that synthesized the seminar’s themes. The exercises challenged teams to identify theories of harm arising from state measures or SOE behavior, design advocacy and enforcement roadmaps, propose proportionate remedies, and weigh trade-offs between public-interest objectives and market contestability. The seminar concluded with collective reflections and an interactive session, bringing together Antis **Apsītis**, Zoltán Nándor **Ay**, Alexei **Gherțescu**, Alexandr **Svetlicinii**, and María Pilar **Canedo** to distill common lessons and recognize participant contributions.

**Overall, the seminar strengthened institutional capacity to address state-related distortions with a balanced, evidence-led toolkit. Participants left with clearer benchmarks for diagnosing whether restrictions stem from rules, conduct, or structural features; a shared approach to assessing SOE governance and incentives rather than relying on formal labels; practical methodologies for embedding competitive neutrality in policy and ownership decisions; and strategies for sustaining effective, good-faith engagement with public bodies without compromising the authority’s enforcement role.**

We warmly thank all speakers – Andrej **Matvoz**, Eleanor **Fox**, Alexei **Gherțescu**, Antis **Apsītis**, Alexandr **Svetlicinii**, Zoltán Nándor **Ay** and colleagues from the Hungarian Competition Authority, Renato **Ferrandi** and María Pilar **Canedo** – for sharing their expertise and making the Ljubljana seminar a substantive and highly practical forum for advancing competition in markets where the State plays a central role.

## Agenda

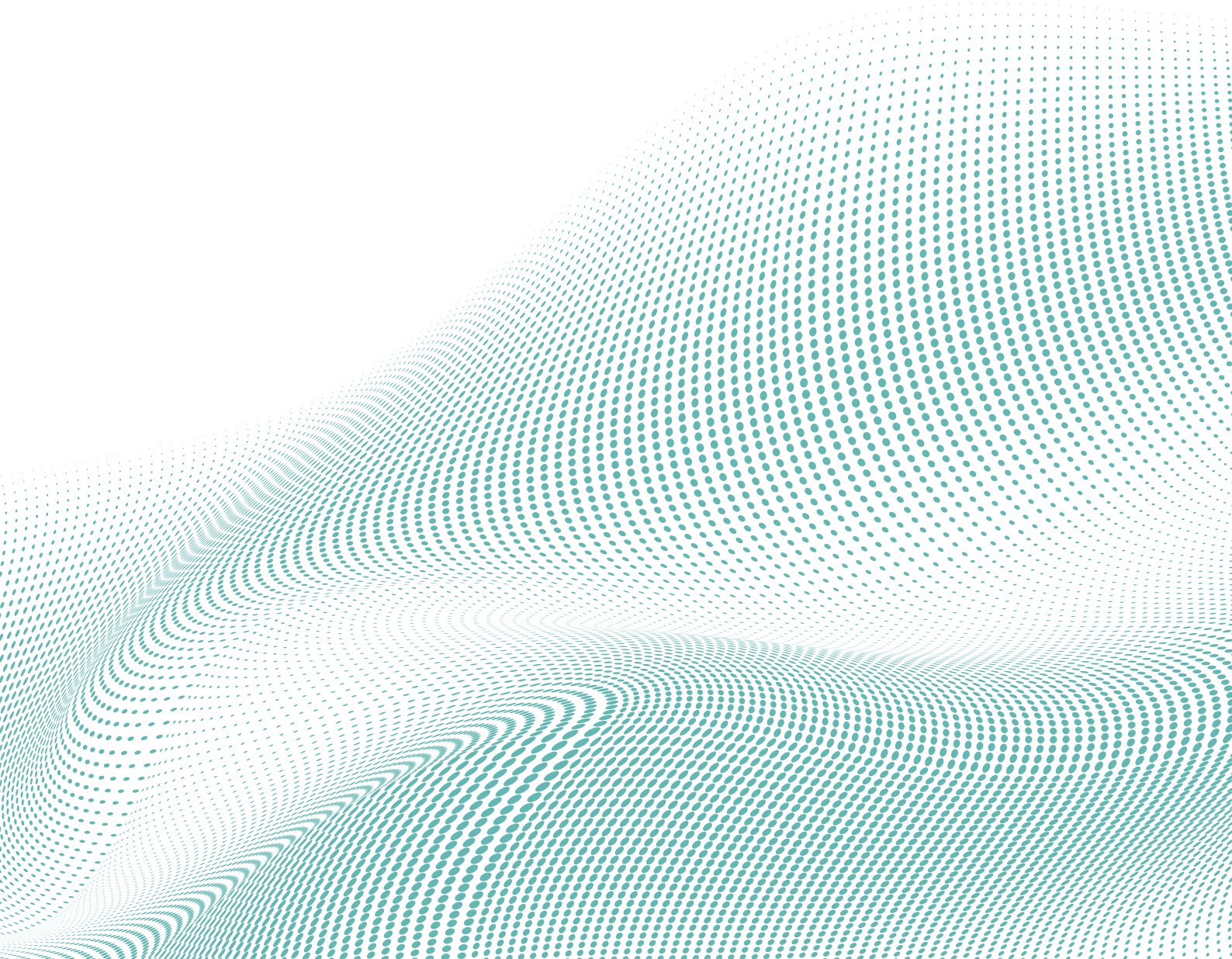
### Tuesday, 4 November 2025

09.30–10.00	<p><b>Welcome and opening remarks</b>  <i>Andrej Matvoz, Director of the Slovenian Competition Protection Agency</i>  <i>Attila Sipos, Secretary General of the Hungarian Competition Authority</i>  <i>María Pilar Canedo, Academic Director of the OECD-GVH Regional Centre</i></p> <p><b>Tour de table</b>  <b>Family Picture</b></p>
10.00–10.30	<p><b>Key-note speech</b>  <i>Andrej Matvoz, Director of the Slovenian Competition Protection Agency</i></p>
10.30–10.50	<b>Coffee break</b>
10.50–11.30	<p><b>When the state harms competition. Introduction to possible reactions</b>  <i>María Pilar Canedo, Academic Director of the OECD-GVH Regional Centre</i></p>
11.30–12.00	<p><b>Addressing regulation through advocacy in Italy</b>  <i>Renato Ferrandi, Head of International and European Affairs at the Italian Competition Authority</i></p>
12.00–13.30	<b>Lunch break</b>
13.30–14.00	<p><b>SOEs and competition. How competitors can enter markets traditionally controlled by the state</b>  <i>Jon Polanec, Practicing lawyer</i></p>
14.00–14.45	<p><b>Fostering competition in public services to municipalities in Italy and leveraging advocacy</b>  <i>Renato Ferrandi, Head of International and European Affairs at the Italian Competition Authority</i></p>
14.45–15.00	<b>Coffee break</b>
15.00–15.30	<p><b>Key-note speech: When the state harms competition. The role for competition law</b>  <i>Eleanor Fox, Emeritus NYU (online presentation)</i></p>
15.30–17.00	<b>Hypothetical case exercise 1</b>
18.00	<b>Boat ride and dinner on River Ljubljanica</b>

### Wednesday, 5 November 2025

09.30–10.15	<p><b>How to determine the existence of “single economic unit” comprised of SOEs for the purpose of merger control</b>  <i>Alexandr Svetlicinii, Associate Professor of Global Legal Studies at University of Macau</i></p>
10.15–11.00	<p><b>“State vs Itself”: Competition authorities investigating anticompetitive actions of other public bodies</b>  <i>Alexei Gherțescu, President of the Competition Council of the Republic of Moldova</i></p>
11.00–11.15	<b>Coffee break</b>
11.15–12.00	<p><b>Cases of State Involvement in Competition Matters in Hungary</b>  <i>Zoltán Nándor Ay, Member of the Competition Council of the GVH</i></p>
12.00–13.15	<b>Lunch break</b>
13.15–14.00	<p><b>Why the administration does not ask for damages in competition infringements</b>  <i>María Pilar Canedo, Academic Director of the OECD-GVH Regional Centre</i></p>
14.00–14.45	<p><b>Competitive neutrality framework in Latvia</b>  <i>Antis Apsītis, Head of the Competition Promotion Department, Competition Council of the Republic of Latvia</i></p>
14.45–15.15	<b>Coffee break</b>
15.15–17.00	<b>Hypothetical case exercise 2</b>

Thursday, 6 November 2025	
09.00–09.45	<b>How to assess competitive incentives of SOEs in context of merger control.</b> <i>Alexandr Svetlicinii, Associate Professor of Global Legal Studies at University of Macau</i>
09.45–10.30	<b>Allies or Adversaries? Balancing competition advocacy, enforcement, and respect for the powers of other public institutions and policymakers.</b> <i>Alexei Gherțescu, President of the Competition Council of the Republic of Moldova</i>
10.30–10.45	<b>Coffee break</b>
10.45–11.15	<b>Assessment procedure for public bodies' participation in capital companies in Latvia</b> <i>Antis Apsītis, Head of the Competition Promotion Department, Competition Council of the Republic of Latvia</i>
11.15–11.45	<b>Final remarks and Kahoot game</b> <i>Antis Apsītis, Zoltán Nándor Ay, Alexei Gherțescu, Alexandr Svetlicinii and María Pilar Canedo</i>
11.45–12.00	<b>Delivery of certificates</b>
12.00–14.00	<b>Lunch</b>





## f. Building a Strong Competition Case in Traditional Markets

### Seminar objectives

The high-level seminar held in **Almaty, Kazakhstan (18-20 November 2025)** examined how competition authorities can **build strong enforcement cases in traditional markets**, with a systematic focus on detection, investigation, substantiation, and deterrence across sectors such as **pharmaceuticals, energy, telecommunications, construction, and railways**. The program's objective was to strengthen agencies' efficiency in tackling **cartels and abuse of dominance**, drawing on casework from multiple jurisdictions and practical methodologies for evidentiary rigor.

The seminar opened with institutional remarks from **Rustam Akhmetov** (*Deputy Chairman of the Competition Authority of the Republic of Kazakhstan*), **Attila Sipos** (*Secretary General, Hungarian Competition Authority*), and **María Pilar Canedo** (*Senior Competition Expert, OECD Competition Division*), which framed the training's goal: equipping practitioners with a coherent, end-to-end approach to case building in markets of high social relevance. **María Pilar Canedo** set the foundation with the **key elements for increasing the efficiency of competition enforcement**, highlighting practical levers—clear prioritization, early evidence planning, disciplined theory-of-harm development, and proportionate procedural strategy—that help authorities move from suspicion to proof without losing momentum or fairness.

Turning to cartels, **Hara Nikolopoulou** (*Vice President, Hellenic Competition Commission*) presented “Creation of a cartel case: Around the banks cartel case in Greece.” The session explored how authorities detect and structure collusion cases: screening and tip-offs, leniency and targeted interviews, digital forensics (emails, chat logs, metadata),

and document analysis to establish a coherent narrative of agreements, practices, and concerted actions. **It emphasized defensible dawn-raid protocols, chain-of-custody discipline, and the articulation of evidence that demonstrates restricted rivalry and measurable harm.** **Melania Radu** (*Competition Inspector, Romanian Competition Council*) followed with “Medicines Under Scrutiny: The Intersection of Innovation, Generics, and Government Policy,” examining how pricing, exclusivity strategies, patent life-cycle management, and procurement frameworks interact with competitive entry, and how authorities balance innovation incentives with access and affordability. **Nikolopoulou** then addressed abuse of dominance in the supply of gas in Greece, discussing foreclosure risks in long-term contracts, access to essential infrastructure, margin-squeeze concerns, and the role of market monitoring and remedy design in restoring contestability. **The day culminated in Hypothetical Case 1**, where participants practiced structuring an investigation from an initial lead through to a draft statement of objections, testing the robustness of their theory of harm and evidence map.

The second day examined informational coordination and sector-specific challenges. **Kjell Jostein Sunnevåg** (*Director of External Relations, Norwegian Competition Authority*) explored **enforcement challenges related to information exchange in the groceries sector**, highlighting how transparency, frequent public signals, and hub-and-spoke configurations can soften competition even without explicit agreements, and how authorities assess market sensitivity of shared data, timing, granularity, and monitoring structures. **Beatriz Marques** (*Competition Expert, OECD Competition Division*) used

the Daraprim experience to illustrate investigative paths in pharmaceutical markets, including the assessment of pricing conduct, access to active ingredients, and contractual strategies that may hinder entry or supply, while distinguishing competition tools from broader policy levers. Márk **Pánczél** (*Member of the Competition Council, Hungarian Competition Authority*) shared **lessons from cooperation with undertakings in cartel investigations – around shipping companies cases**, focusing on calibrated use of leniency, settlements, and evidence-sharing to accelerate fact-finding while preserving deterrence. Sunnevåg returned with “The importance of tip-offs for cartel enforcement,” detailing how hotlines, whistleblower protections, and incentives improve case origination, and how authorities validate anonymous leads through cross-checks, screens, and triage to avoid resource misallocation. **The day concluded with Hypothetical Case 2**, challenging teams to diagnose suspected collusion from mixed signals and devise an investigation plan combining interviews, forensic review, and market analysis.

The final day concentrated on dominance and circumstantial proof. Marques discussed telecommunications cases, with reference to AT&T, explaining how authorities assess unilateral effects, coordinated risks, and vertical issues in complex network markets; the session underscored the importance of entry barriers (spectrum, infrastructure), switching frictions, and remedy feasibility. Canedo presented “How to create an enforcement case based on non-direct evidence,” showing how authorities build compelling cases from patterns—price correlations, timing of decisions, parallel conduct accompanied by “plus factors,” internal communications, and incen-

tive analysis—when direct admissions or explicit agreements are absent. Pánczél then walked through designing abuse-of-dominance investigations based on a recent Article 102 case in beverage sales, emphasizing market definition in multi-format retail, measurement of foreclosure (e.g., access to shelf space or promotional channels), the role of contract terms and loyalty mechanisms, and the translation of economic findings into clear, proportionate remedies. The seminar closed with **final remarks and an interactive Kahoot session** led by María Pilar **Canedo**, Beatriz **Marques**, and Márk **Pánczél**, followed by **delivery of certificates**.

**Overall impact and takeaways.** The Almaty seminar strengthened participants’ practical toolkit for traditional-market enforcement. Attendees left with (i) clearer **benchmarks for case design** – from early theory-of-harm alignment to disciplined evidence plans; (ii) sharper **methods for detecting and proving cartels**, including the effective use of tip-offs, leniency, and digital forensics; (iii) a **structured approach to dominance** in infrastructure-heavy and consumer-critical sectors, with remedy design tied to identified foreclosure mechanisms; and (iv) greater confidence in **building cases on non-direct evidence** by combining market outcomes, internal documents, and incentive analysis into a persuasive whole.

We warmly thank all speakers – Hara **Nikolopoulou**, Márk **Pánczél**, Kjell Jostein **Sunnevåg**, Melania **Radu**, Beatriz **Marques**, and María Pilar **Canedo** – as well as our hosts and institutional partners, for making the Almaty seminar a substantive, hands-on forum for advancing competition enforcement in traditional markets.

## Agenda

Tuesday, 18 November 2025	
09.30–10.15	<b>Opening remarks</b> Rustam <b>Akhmetov</b> , Deputy Chairman of the Agency for Protection and Development of Competition of the Republic of Kazakhstan Attila <b>Sipos</b> , Secretary General of the Hungarian Competition Authority María Pilar <b>Canedo</b> , Academic Director of the OECD-GVH Regional Centre <b>Tour de table</b> <b>Family Picture</b>
10.15–11.00	<b>Key elements for increasing efficiency of competition enforcement</b> María Pilar <b>Canedo</b> , Academic Director of the OECD-GVH Regional Centre
11.00–11.20	<b>Coffee break</b>
11.20–12.05	<b>Creation of a cartel case. Around the banks cartel case in Greece</b> Hara <b>Nikolopoulou</b> , Vice President of the Hellenic Competition Commission

### Tuesday, 18 November 2025

12.05–12.40	<b>Medicines Under Scrutiny: The Intersection of Innovation, Generics, and Government Policy</b> <i>Melania Radu, Competition Inspector at the Romanian Competition Council</i>
12.40–14.10	<b>Lunch break</b>
14.10–15.00	<b>Abuse of Dominance cases. The supply of gas in Greece</b> <i>Hara Nikolopoulou, Vice President of the Hellenic Competition Commission</i>
15.00–15.15	<b>Coffee break</b>
15.15–17.00	<b>Hypothetical case 1</b>
19.00	<b>Gala dinner</b>

### Wednesday, 19 November 2025

09.30–10.15	<b>Enforcement challenges related to information exchange in a market important for consumers and politicians. Based on the groceries markets</b> <i>Kjell Jostein Sunnevåg, Director of External Relations at the Norwegian Competition Authority</i>
10.15–11.15	<b>More on pharma cases: Toxoplasmosis Drug Daraprim case in USA</b> <i>Beatriz Marques, Competition Expert at the OECD</i>
11.15–11.30	<b>Coffee break</b>
11.30–12.30	<b>Lessons learned from cooperation with undertakings under investigation in cartel cases – Around shipping companies' investigations.</b> <i>Márk Pánczél, Member of the Competition Council at the GVH</i>
12.30–14.00	<b>Lunch break</b>
14.00–14.45	<b>The importance of tip-offs for cartel enforcement</b> <i>Kjell Jostein Sunnevåg, Director of External Relations at the Norwegian Competition Authority</i>
14.45–15.00	<b>Coffee break</b>
15.00–17.00	<b>Hypothetical case 2</b>

### Thursday, 20 November 2025

09.30–10.15	<b>Telecommunications cases. The AT&amp;T telecoms case</b> <i>Beatriz Marques, Competition Expert at the OECD</i>
10.15–11.15	<b>How to create an enforcement case based on non-direct evidence</b> <i>María Pilar Canedo, Academic Director of the OECD-GVH Regional Centre</i>
11.15–11.30	<b>Coffee break</b>
11.30–12.15	<b>Designing abuse of dominance investigations – based on a recent Art. 102 case in the market of sales of beverages</b> <i>Márk Pánczél, Member of the Competition Council at the GVH</i>
12.15–13.00	<b>Final remarks and Kahoot game</b> <i>María Pilar Canedo, Beatriz Marques, Márk Pánczél</i> <b>Delivery of certificates</b>
13.00–14.30	<b>Lunch</b>
15.00–18.00	<b>Museum of Arts, Sightseeing tour</b>



## D. Evaluation of RCC Seminars in 2025

Participants are invited to provide feedback after each seminar through an evaluation questionnaire, allowing for continuous monitoring and opportunities to improve the quality of the seminars. Based on the evaluation results, it can be concluded that the workshops **offered valuable intellectual and practical insights**, highly rel-

evant to the participants' daily work. Moreover, the seminars provided an excellent platform for the exchange of views and experiences. On average, the seminars received an impressive rating of 9.3 out of 10.0 over the year, reflecting the meaningful impact achieved.

**Table 2: Detailed evaluation by event and category**

Evaluation results by event and category				
	Usefulness of the event	Quality of the speakers	Quality of the break-out sessions	Quality of the organisation
<b>RCC Seminar</b> <i>"Tourism, Transport and Competition"</i>	9,3	9,1	9,1	9,4
<b>Competition Lab for Judges</b> <i>"Horizontal cooperation agreements"</i>	9,9	9,6	Not rated	Not rated
<b>GVH Staff Training</b> <i>"Antitrust, Platforms and Consumer Welfare: Recent Trends and Challenges"</i>	8,0	8,0	8,4	9,0
<b>Joint Seminar with the Slovenian Competition Protection Agency</b> <i>"When the State Harms Competition: Possible Infringements and Reactions, SOEs and Competitive Neutrality"</i>	9,7	9,5	9,6	9,9
<b>Outside Seminar</b> <i>"Building Strong Competition Cases in Traditional Markets"</i>	9,6	9,7	9,5	9,9
<b>Average</b>	<b>9,3</b>	<b>9,2</b>	<b>9,2</b>	<b>9,6</b>

## 2. Newsletters

It is noteworthy that the RCC Newsletter “*Competition Policy in Eastern Europe and Central Asia*” has established itself as an eminent publication in the region, attracting contributions not only from beneficiary competition agencies but also from competition law professionals worldwide. In 2025, the RCC published two additional issues: **one focusing on bid rigging** (January 2025) and

**another one on liberalisation, tourism and transport** (July 2025). To date, **a total of 26 issues** have been released, all available in both English and Russian on the RCC website.<sup>2</sup>

The Newsletter serves as a valuable tool for fostering cooperation and the exchange of information, strengthening our network and enhancing the efficiency of our work.



<sup>2</sup> <https://oecdgvh.hu/contents/about/newsletters>



### 3. Educational videos



One of our core initiatives is the video project “*Key competition topics explained in a few minutes*”, which features **short videos** designed to explain key competition issues in an accessible format. In 2025, three educational videos were released, covering competition and regulation, an introduction to cartels, and competition in labour markets.


This project has become a valuable addition to the RCC toolkit, with training videos on topics such as bid rigging, abuse of dominance, and market definition ranking among the most-watched OECD educational videos

on competition. Thanks to the support of the beneficiary agencies, these training videos are now publicly available with **subtitles in several languages**, including Arabic, following the successful conclusion of a tripartite agreement with the **UN Economic and Social Commission for Western Asia**. Moreover, we have produced four videos for national judges to help them better understand competition law.


The videos can be accessed on the YouTube channel of the OECD.<sup>3</sup>









**EDUCATIONAL VIDEOS**  
CONTRIBUTIONS







FRANCE



European Commission



OECD



<sup>3</sup> [https://www.youtube.com/watch?v=GRITcq\\_VpEg&list=PLyBGvyEYBNlq5nWCYUzri1-1XvMTNAf2N](https://www.youtube.com/watch?v=GRITcq_VpEg&list=PLyBGvyEYBNlq5nWCYUzri1-1XvMTNAf2N)



### III. FINANCIAL AND INTELLECTUAL CONTRIBUTION

According to the Memorandum of Understanding, the founding parties are responsible for ensuring that the Centre operates at the highest possible standards to **effectively achieve its main objectives**. Both parties contribute significantly, both intellectually and financially, to support the efficient and smooth functioning of the RCC. Furthermore, the extensive experience of OECD member countries plays a key role in further enhancing the quality of the seminars. These training programmes, aimed

at beneficiary competition agencies and national judges, remain a key asset for **knowledge-sharing** and **capacity-building** year after year. In 2025, the RCC operated with a **budget of EUR 480 586**, supported by contributions from the GVH, the OECD and the European Commission.

The table below presents a detailed breakdown of the **total operating costs for 2025**, organised by funding source, event and major cost categories.

**Table 3: Sources of funding in 2025**

Sources of funding (EUR)	
Hungarian Competition Authority (Gazdasági Versenyhivatal – GVH)	450 586
Organisation for Economic Cooperation and Development (OECD)	30 000
Breakdown of total expenses by items (EUR)	
<b>A) Direct organisational costs</b>	
Competition Lab for Judges “Cartels”(December 2024)	27 955
20th Anniversary Conference	53 941
RCC Seminar “Tourism, Transport and Competition”	44 198
Competition Lab for Judges “Horizontal Cooperation Agreements”	43 880
GVH Staff Training “Antitrust Platforms and Consumer Welfare”	16 388
Joint Seminar “When the State Harms Competition: Possible Infringements and Reactions”	33 891
Outside Seminar “Building Strong Competition Cases in Traditional Markets”	15 258
<b>Total direct organisational costs</b>	<b>235 511</b>
<b>B) Other operational costs of the RCC</b>	<b>17 292</b>
<b>C) Voluntary contribution by the GVH to the OECD</b>	<b>227 783</b>
<b>Total expenses in 2025</b>	<b>480 586</b>



## IV. RCC DEDICATED STAFF



The RCC operates as a virtual centre and is hosted at the GVH headquarters (1026 Budapest, Riadó utca 5–11.). Its virtual structure enables the efficient allocation of resources toward its core mission: providing capacity-building assistance and policy advice through seminars on key competition law topics for enforcement officials, sector regulators and national judges.

It is important to highlight that the RCC is a joint initiative, managed by a senior competition expert at the OECD headquarters in Paris and a coordinator based at the GVH in Budapest. As such, the Centre's work draws on the combined expertise of both institutions. The OECD Academic Director is responsible for designing the substantive programme of the seminars and inviting speakers, while the GVH provides the technical and logistical support, including participant invitations, conference venues, travel arrangements, accommodation, and communication with beneficiaries via email and telephone. Additionally, the GVH seeks to provide experts for each workshop, while other speakers are invited from various OECD member states.



## V. CONTACT INFORMATION

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