
To: Director General

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Subject: G20 Competition policy workshop

A. Background

1. The G20 comprises 19 countries (Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Republic of Korea, Mexico, Russia, Saudi Arabia, South Africa, Türkiye, the United Kingdom, and the United States), the European Union (EU) and the African Union (AU).
2. The G20 Competition Policy Workshop, brought together competition authorities, policymakers, and experts from G20 member countries to discuss emerging challenges and priorities in global competition enforcement. The workshop focused on how competition policy can adapt to evolving economic realities, particularly in digital markets, global supply chains, sustainability transitions, and cross-border mergers.
3. The main objective of the workshop was to promote dialogue and cooperation among G20 jurisdictions, share best practices, and strengthen the role of competition policy in fostering fair, inclusive, and resilient economic growth. By facilitating the exchange of experiences and policy approaches, the workshop aimed to build a more coherent international framework for addressing anti-competitive behaviour and ensuring that markets remain open, innovative, and consumer-oriented.
4. The panel were drawn from G20 competition agencies that is Brazil, South Africa, Russia, Saudi Arabia and Italy.

B. Key highlights

5. The panel highlighted the importance of strengthening international cooperation between competition agencies through regional organizations, highlighting the need to build trust and



promote the mutual exchange of information and experiences between mature, large competition agencies and young, developing, and smaller ones.

6. The sustainability–competition concern was also discussed, highlighting that agencies must make it clear that sustainability cannot be used as a justification for businesses to cartelize or engage in other anti-competitive conducts.
7. The Italian Competition Authority (AGCM) shared with the participants a cartel case they had handled and a sector inquiry. The cartel case was on oil companies in which a price-fixing scheme among six major fuel suppliers was exposed. The firms coordinated the value of the bio-component used in petrol and diesel blends between 2020 and 2023. This conduct, according to the AGCM, distorted fuel prices and burdened consumers with unjustified costs.
8. The case demonstrates how even highly regulated and mature industries can engage in sophisticated coordination under the guise of market transparency. The companies were penalized a record fines (over €936 million in total) which underline Italy’s willingness to sanction cartel behaviour that manipulates regulatory cost components and harms consumers.
9. The other case that was shared with the participants was an ongoing sector inquiry into school publishing. The inquiry takes a more preventive and exploratory route, examining whether textbook publishers and distribution systems operate in ways that stifle competition, inflate prices, or limit access to affordable educational materials. This reflects a softer but equally important side of competition enforcement addressing structural inefficiencies and consumer harm without explicit collusion.
10. The AGCM’s investigation into the textbook market seeks to understand how entrenched practices may limit competition and drive-up costs for families. The inquiry also questions whether digital licensing and platform control create new barriers to entry, particularly as learning materials move online. In this case, the Authority is exploring how market design and institutional incentives rather than explicit agreements shape competitive outcomes.
11. The presenters also shared how competition enforcement decisions made in the G20 countries affect competition in markets and industries in less development countries. This was particularly in cases where firms that operate in G20 countries have their subsidiaries and their products traded in markets in developing countries. A cases was presented where





merger decisions in pharmaceuticals had spill-over effects in pharmaceutical industries in developing countries. It was underscored that competition agencies in G20 countries need to appreciate the effects that their competition decisions may have on markets in other jurisdiction.

C. Conclusions

12. In the closing remarks, the importance of strengthening international cooperation among competition agencies through regional bodies was emphasized.
13. Competition agencies in G20 countries to take into consideration the spill-over effects of their enforcement decisions on markets and industries in development countries.
14. Sustainability justifications should not be an excuse for firms to engage in anti-competitive conducts.

Prepared by

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