

# Telecommunications Regulation

## Where Does It Come From and Where Is It Going To?

A Brief History of the Development of Telecommunications Regulation in  
the European Union

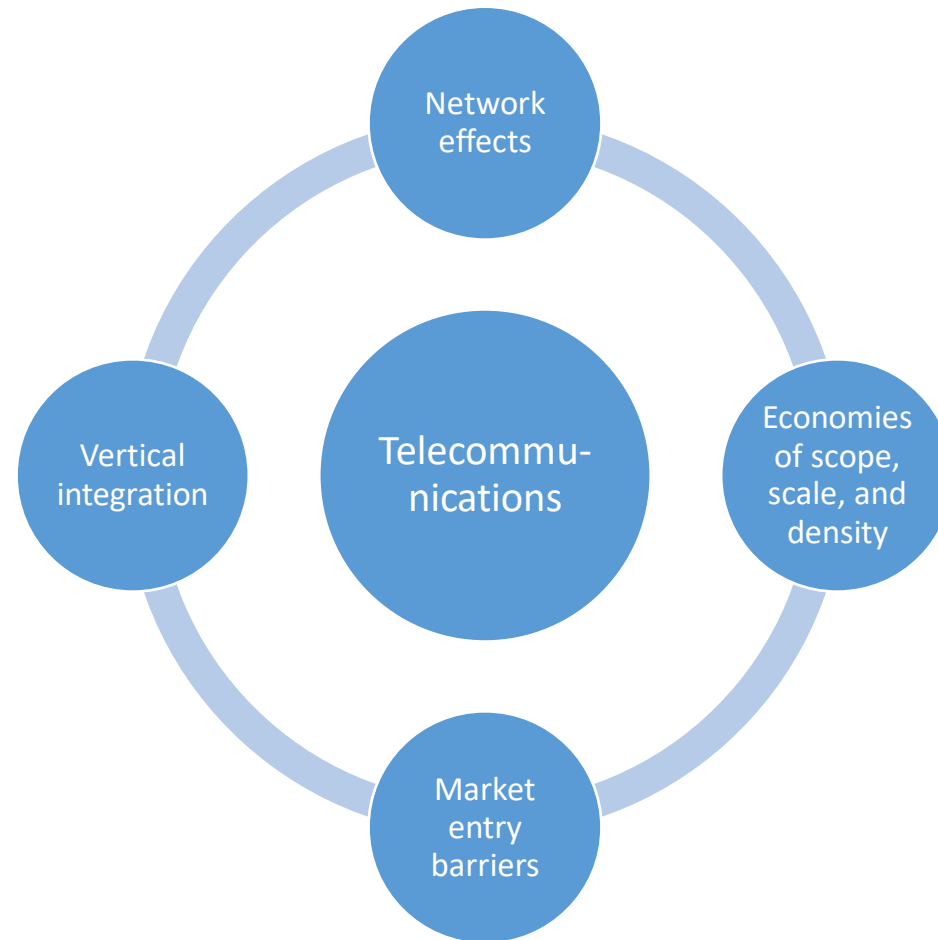


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# What has telecoms regulation ever done for us?

# Telecommunications: A Network Industry



## The Not-So-Good Old Times



- State-owned operators
- Government monopoly
- Tariffs (fees) and quality of service determined by government

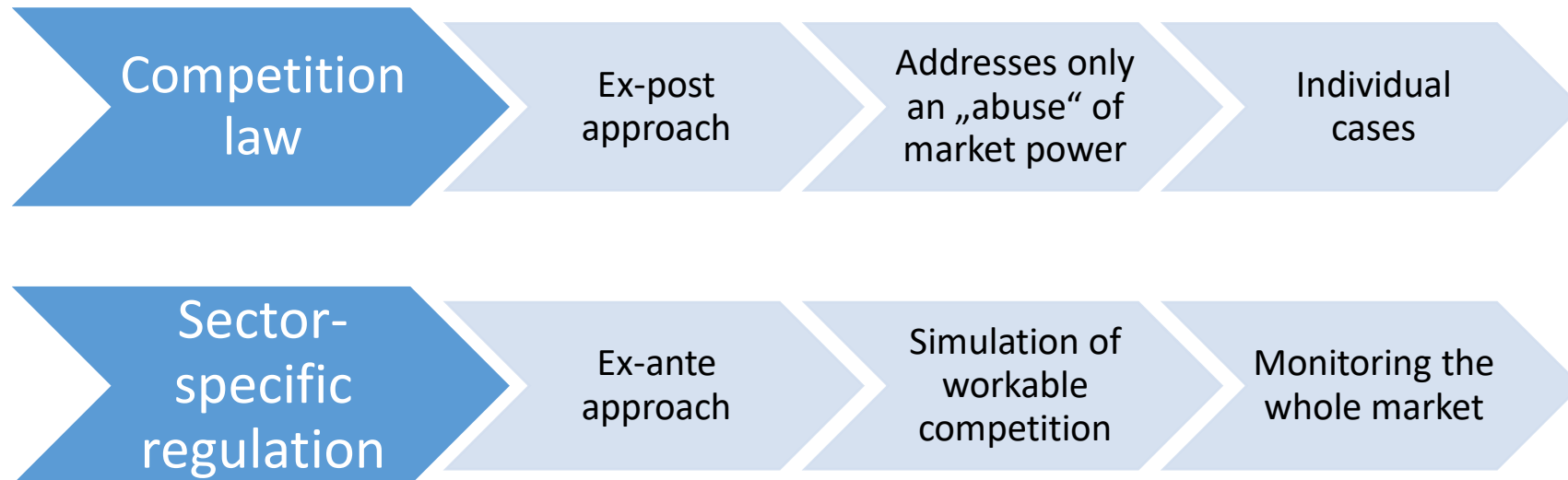
## Privatisation and Liberalisation

- Private companies compete with each other
- Incumbent operator – There can be only one?



## Privatisation, Liberalisation, and Regulation

- Private companies compete with each other
- Incumbent operator – There can be only one?



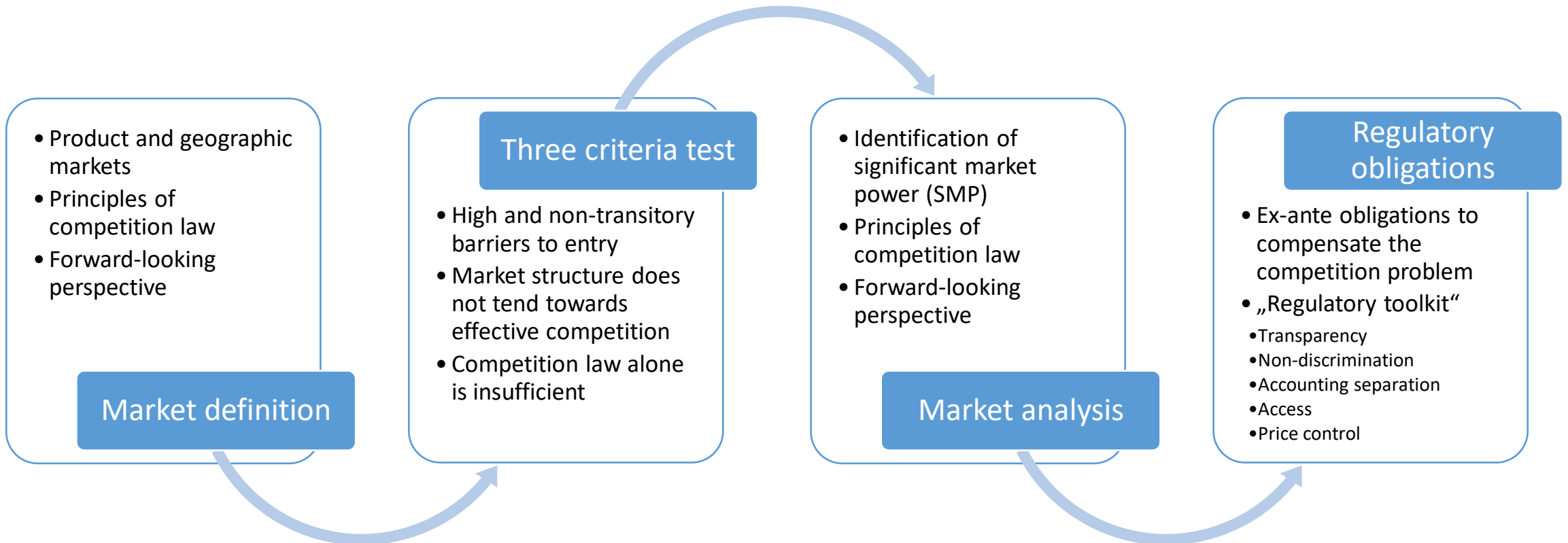
# Open Network Provision (ONP): First Steps Towards Competition

1990



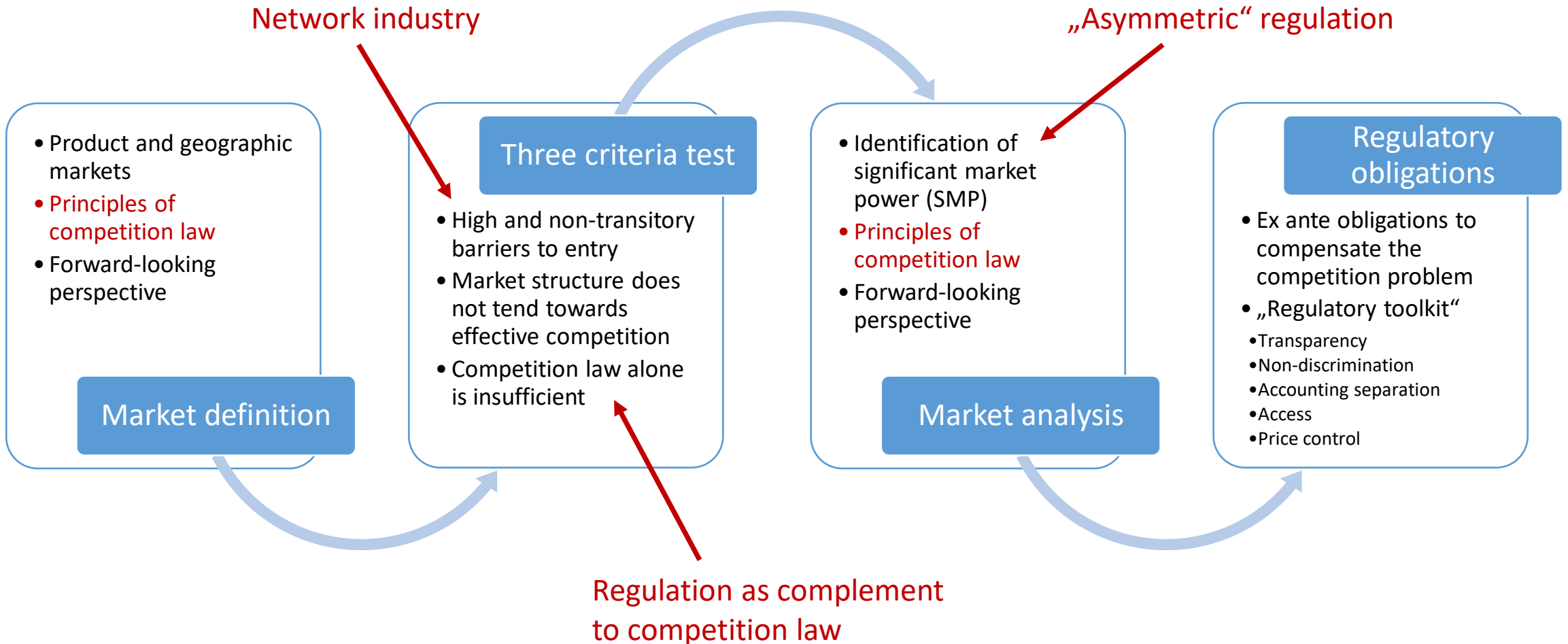
# The „New“ Regulatory Framework for Electronic Communications

2002





# The „New“ Regulatory Framework for Electronic Communications



# The Results of Regulation (Until Now)

Effective competition - no ex ante regulation  
 No effective competition - ex ante regulation  
 Partial competition - partial ex ante regulation

n number of rounds of market analysis

	2014 RECOMMENDATION					2007 REC.		2003 RECOMMENDATION									
	Call term. on fixed network	Voice call term. on mobile networks	Wholesale local access	Wholesale central access	Wholesale high-quality access	Access to PSTN for res. & non-res.	Call orig. on fixed network	Localnat. Call for res.	Internat. call for res.	Localnat. call for non-res.	Internat. call for non-res.	Retail LL	Transit on fixed network	Trunk segments LL	Access & call orig. on mobile network	Broadcast Transmis.	
	Market 1	Market 2	Market 3a	Market 3b	Market 4	ex-Mkt 1	ex-Mkt 2	ex-Mkt 3	ex-Mkt 4	ex-Mkt 5	ex-Mkt 6	ex-Mkt 7	ex-Mkt 10	ex-Mkt 14	ex-Mkt 15	ex-Mkt 18	
Austria	3	4	5	5	5	4	4	3	2	4	3	4	1	2	1	4	
Belgium	3	3	3	3	2	3	2	3	1	3	1	1	2	1	1	2	
Bulgaria	4	4	3	2	2	3	3	2	2	2	2	1	1	1			
Croatia	2	2	2	2	3	2	2	1		1		1		3			
Cyprus	3	4	4	4	3	3	3	3	2	3	2	2	3	3	4	4	
Czech Republic	5	5	3	3	3	4	4	2	2	2	1	2	1	1	2	2	
Denmark	4	5	4	4	4	4	4	2	2	1	1	2	1	1	1	1	
Estonia	4	5	4	4	3	3	3	1	1	1	1	1	1	2	1	3	
Finland	2	1	4	4	1	2	3	2	1	2	1	2	2	1	1	3	
France	5	5	6	6	4	4	4	1	1	1	1	2	1	2	1	4	
Germany	5	6	5	5	2	4	3	2	1	2	1	2	2	1	1	5	
Greece	4	4	4	4	3	3	3	3	1	3	1	3	3	3	1	1	
Hungary	4	6	4	4	4	6	4	3	3	3	3	3	2	2	2	3	
Ireland	5	3	3	3	3	3	3	2	2	2	2	2	2	2	1	2	
Italy	3	6	4	4	4	3	2	2	2	2	2	2	3	2	2	2	
Latvia	5	5	4	4	4	2	3	4	3	4	3	3	2	1	1	1	
Lithuania	5	4	4	4	2	2	3	3	2	3	2	1	2	2	1	6	
Luxemburg	4	6	3	3	3	3	3	2	2	2	2	2	1	1	1		
Malta	4	4	2	2	3	3	3	2	2	2	2	3	2	2	2	1	
Netherlands	5	5	5	4	3	4	3	2	2	2	2	2	2	2	1	2	
Poland	3	3	3	4	3	3	4	2	2	2	2	2	1	1	2	3	
Portugal	3	3	3	3	3	2	2	2	2	2	2	1	1	3		2	
Romania	3	3	4	3	2	2	2	1	1	1	1		3			2	
Slovakia	4	5	3	3	4	4	4	2	2	2	2	2	2	1	1	2	
Slovenia	2	5	4	4	3	3	3	2	1	1	1	2	3	1	3	3	
Spain	4	4	3	3	3	4	3	2	2	2	2	2	2	4	2	4	
Sweden	5	5	3	4	3	3	3	1	1	1	1	2	2	1	1	5	

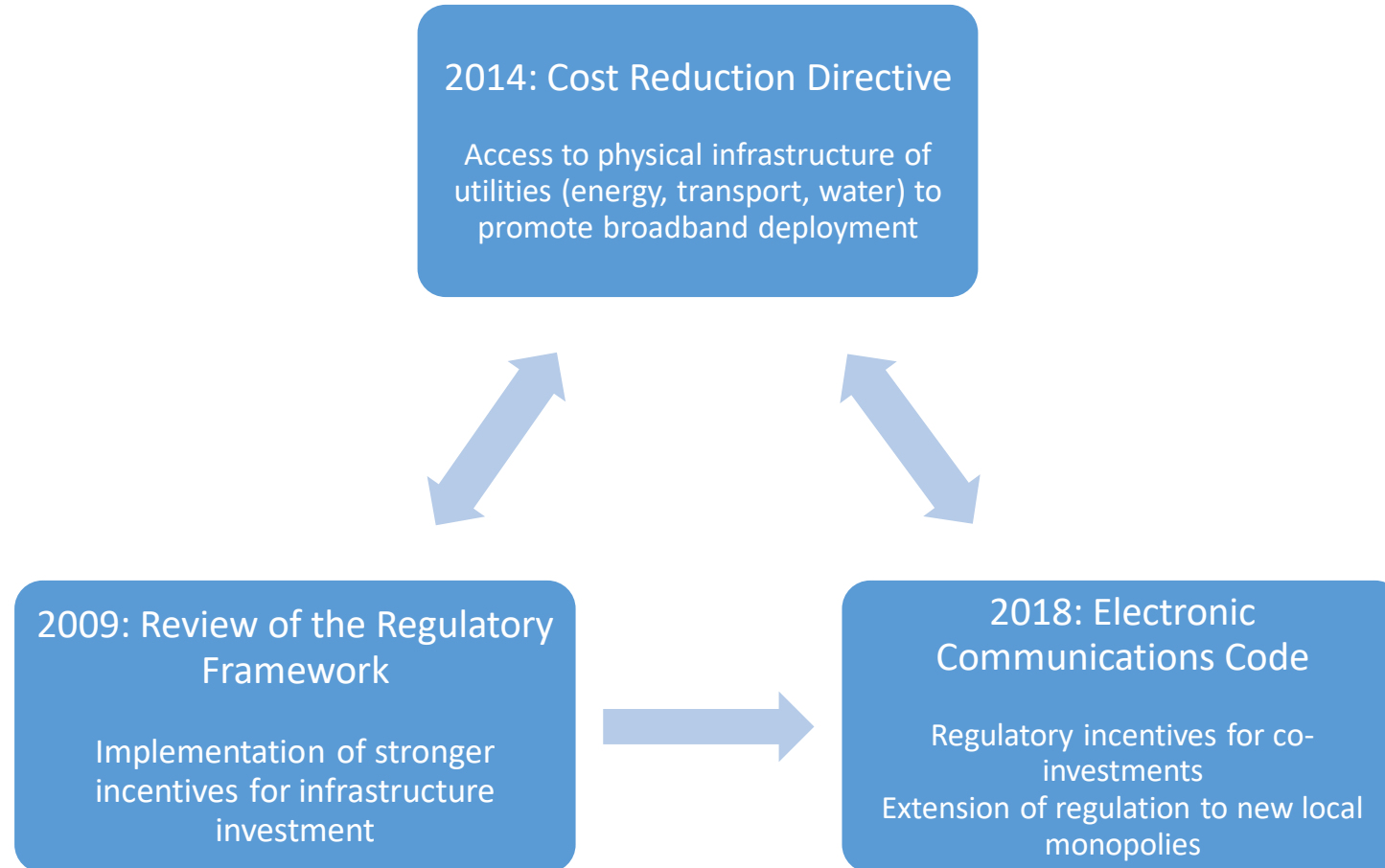
Source: <https://digital-strategy.ec.europa.eu/en/library/definition-and-analysis-relevant-markets>

# What has telecoms regulation ever done for us?

**Apart from low prices, greater consumer choice, technological innovation, EU-wide services, increased competition, and better service quality?**

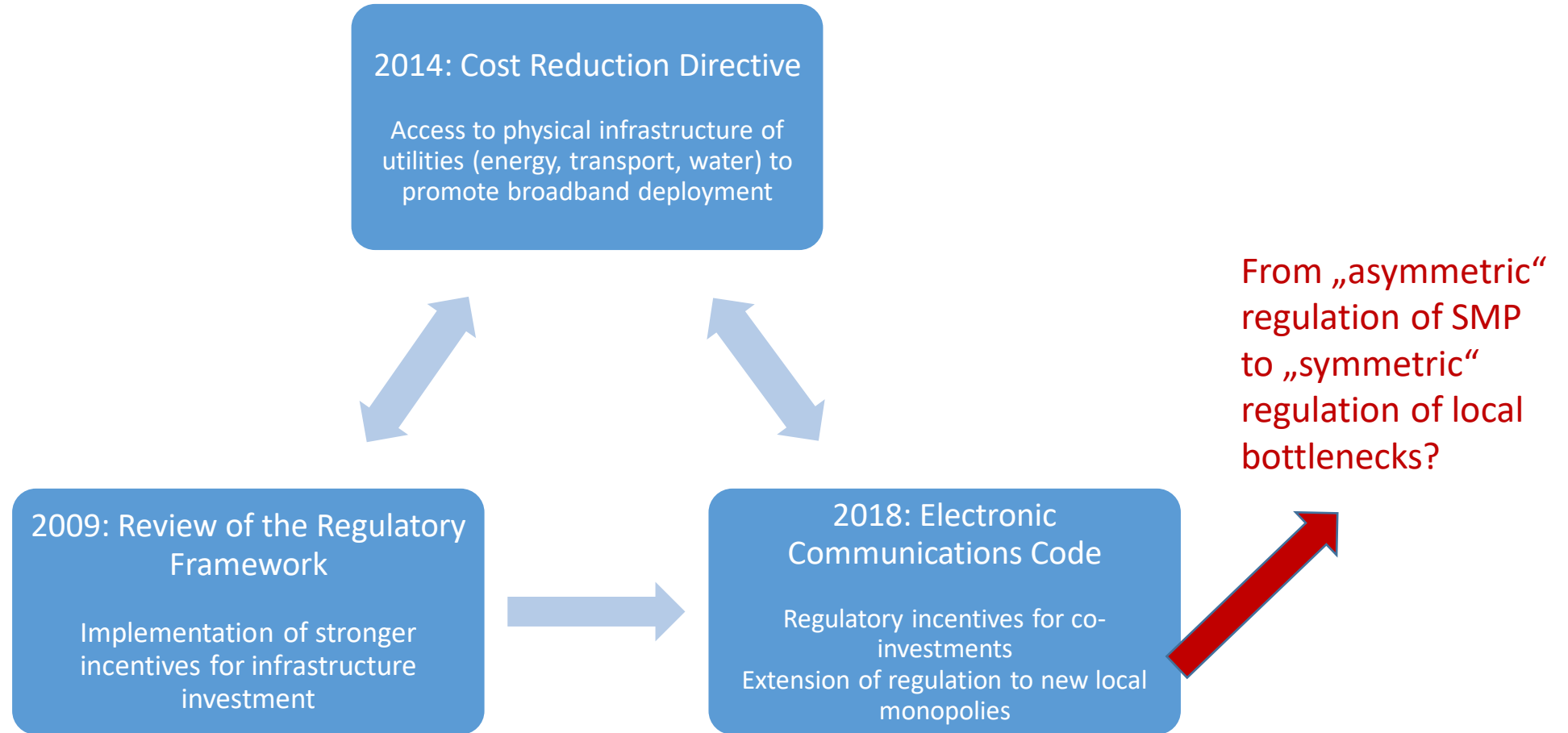


# The Future is Fibre: From Competition towards High-speed Broadband Roll-out



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2009/18 



# Thank You for Your Attention!

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