New European regulatory framework and the issue of convergence

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End users of electronic communications services in Sweden

- 90 % of the Swedish population, between 16 and 75 years, have access to fixed telephony.

- More than 90 % of the Swedes use mobile phones.

- 77 percent of the Swedes use the Internet and 71 percent have access to the Internet from their homes.

- The broadband penetration is just above 30 percent.

Successfull 3G roll-out

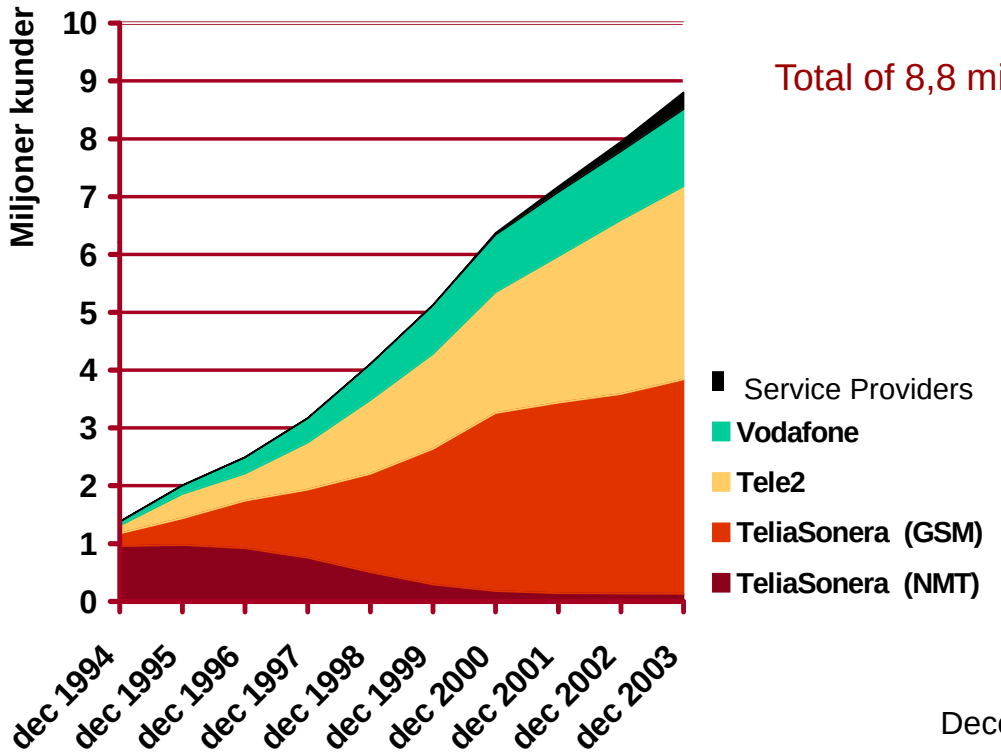
Sweden has a leading position in Europe

- 85 % population coverage in Sweden
- 75 % in Great Britain
- 60 % in Italy

Why regulate the market for electronic communications?

- Network industry
- Limited ”bottleneck resources”
- Tendency towards concentration
- Extensive sector-specific regulation is needed

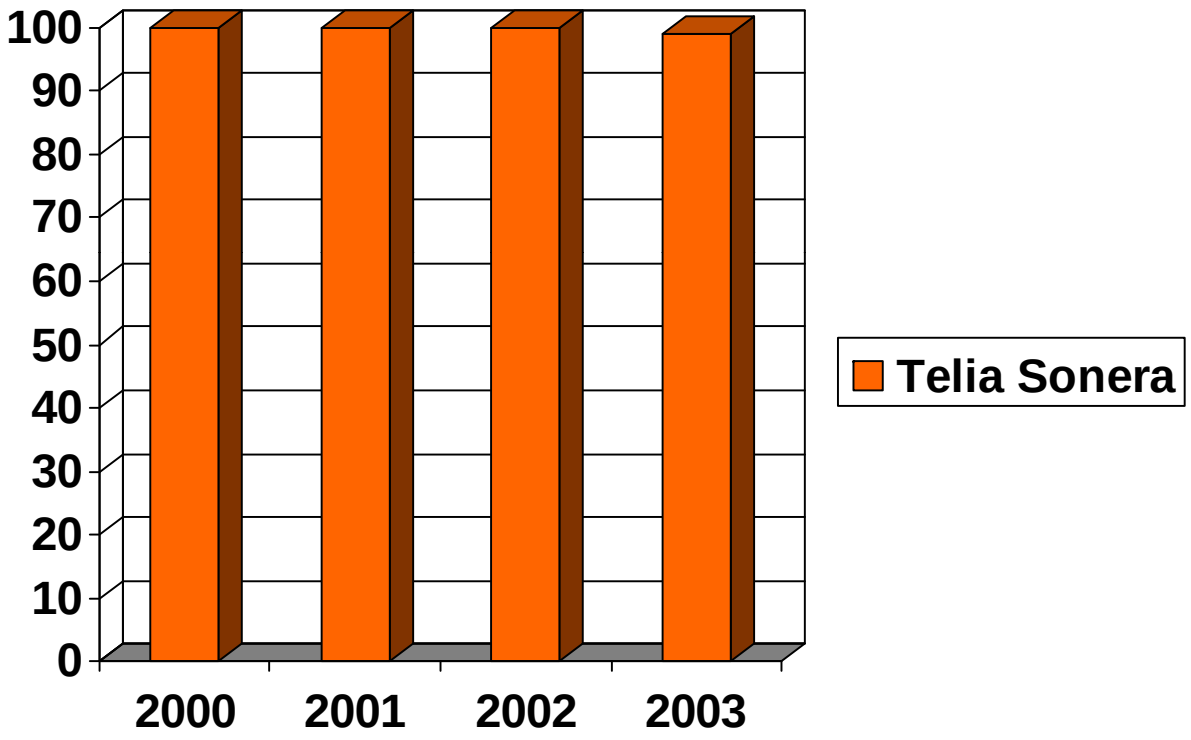
Number of mobile subscriptions



Total of 8,8 million mobile subscriptions

December 2003

Incumbent market share - fixed telephony subscriptions



New regulatory framework 2003 in Europe

- National regulatory authorities (NRA:s) evaluate level of competition on 18 markets recommended by the Commission

- If the competition is not efficient the NRA impose obligations for dominant operator(s) to give access to networks to rivals or to sell services to rivals

- NRA can impose price control on wholesale level and retail level

Markets	Decision
8. Call origination on the public telephone network provided at a fixed location	done
9. Call termination on individual public telephone networks provided at a fixed location	done
10. Transit services in the fixed public telephone network	done
16.Voice call termination on individual mobile networks	done
7. Minimum set of leased lines	done
11. Wholesale unbundled access	done
12. Wholesale broadband access in the form of bitstream access	done
1-2. Access to the public telephone network at a fixed location for residential och non-residential customers	done

Markets	Decision
3-6. Publicly available telephone services provided at a fixed location	Winter/spring-05
18. Analouge terrestial broadcasting transmission services, to deliver TV content to end users	summer-05
18. Analouge terrestial broadcasting transmission services, to deliver national radio programming content to end users	summer-05
18. Digital terrestial broadcasting transmission services, to deliver TV content to end users	summer-05
15. Access and call origination on public mobile telephone networks	summer-05
13-14. Wholesale trunk segments of leased lines and wholesale terminating segments of leased lines	winter-05
17. International roaming	summer-05

Voice over IP

Voice over IP – a regulator´s dilemma?

- Great potential of improving competition
- Soon to be a mass market
- PSTN-oriented regulatory framework
- European Regulator´s Group welcomes VoIP

New flexibility in Spectrum Management

- Convergence between radio-based services (fixed/mobile combinations)
- Affects frequency planning and allocation
- Radio Spectrum Policy Group (RSPG)
- Common opinions on switchover to digital broadcasting and secondary trading

Digital switchover

- Efficiency and flexibility in the use of spectrum
- Spectrum efficiency ”releases” free spectrum
- How use this spectrum – TV, mobile services?

RSPG:

- EU-level coordination
- Neutral approach to new technologies
- Flexibility to meet the individual member state´s demands

Secondary trading

RSPG:

- Could be benificial in some parts of the spectrum
- Greater experience is needed before European harmonisation
- Phased introduction to eliminate risks
- Harmonisation still important