

“Mobile Broadband and Multimedia Convergence”

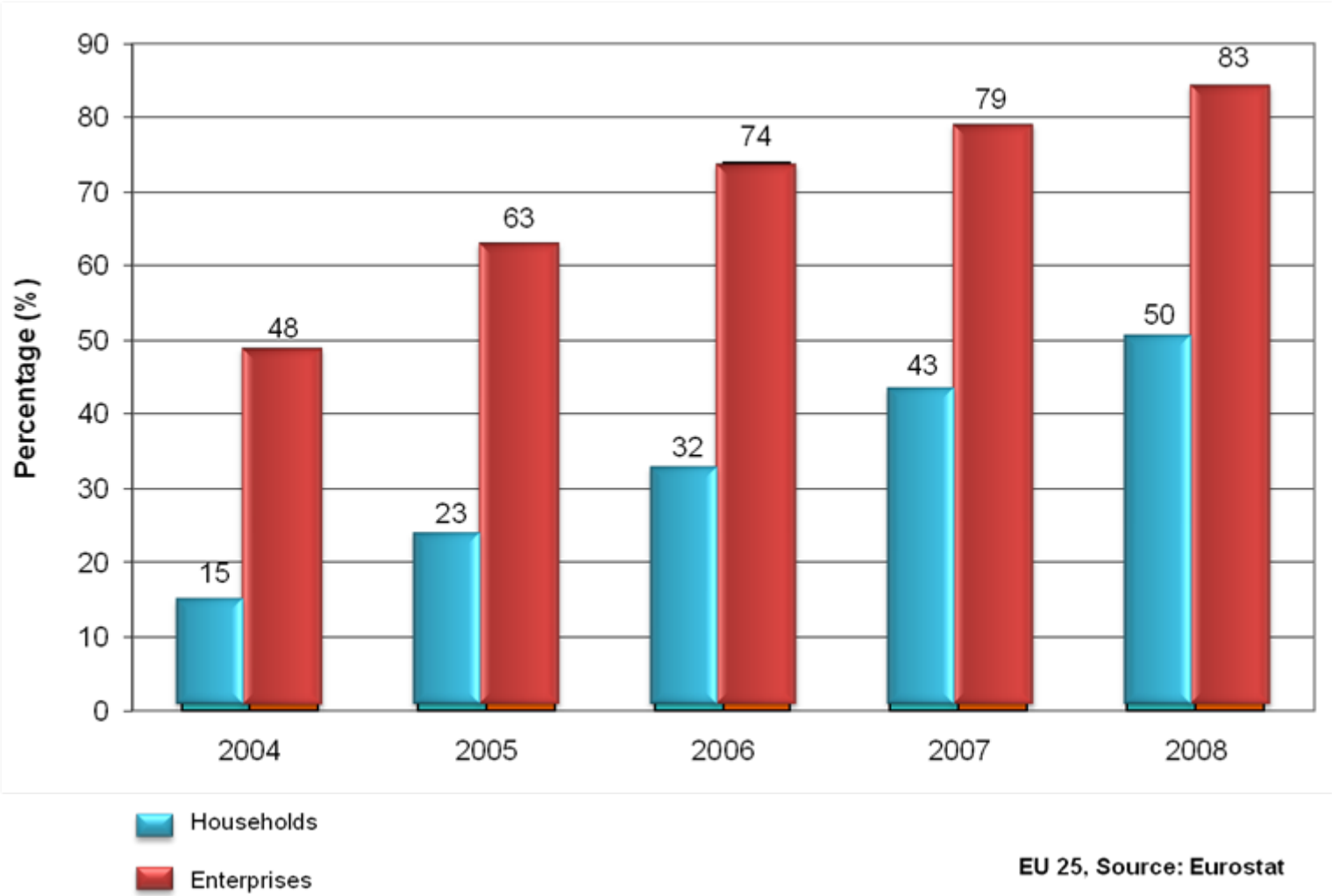
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EETT's 4th International Conference for Broadband



Broadband Growth in Europe



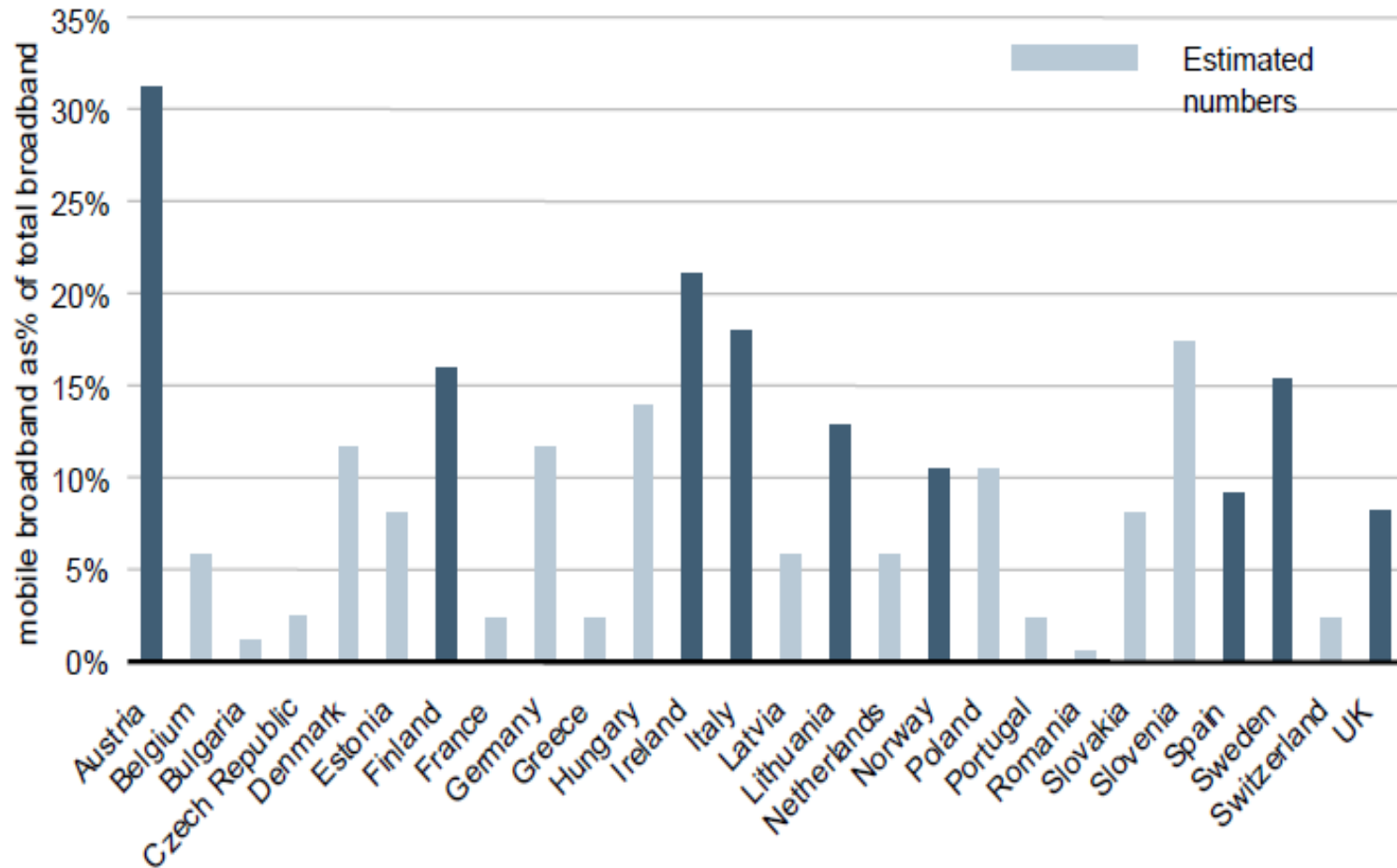
Mobile Broadband services boost EU economy

- Mobile broadband services are expected to generate service revenue of € 23 bn in Europe in 2014, compared with € 6 bn in 2008, which represents a compound annual growth rate of 46% (*Analysys Mason*)
- Thanks to the wide availability and high quality of mobile broadband, attractive pricing, and user-friendly devices, the number of European mobile broadband users will reach 116.6 million in 2014, up from 24.3 million in 2008 (*Bakhyt Weeks, Pyramid Research*)
- Mobile broadband connections represent 13% of the EU population. Mobile broadband via data cards and dongles is becoming a viable alternative to fixed broadband in countries like Austria (number of connections equivalent to 11.4% of population), Finland (9.1%) and Portugal (8.3%) (*European Committee*)
- Vodafone Greece is the first in the Greek Market, and among the first in European countries, to provide through its upgraded network the most advanced high bandwidth HSPA (High Speed Packet Access), wireless broadband services with a maximum downloading speed of 14.4 Mbps and up to 2 Mbps uploading (*Vodafone Greece*)



Mobile Broadband Alternative to Fixed Broadband

Mobile broadband as % of total broadband, June 2008



[Source: Analysys Mason, 2008]



Mobile Broadband & Media Converged Services



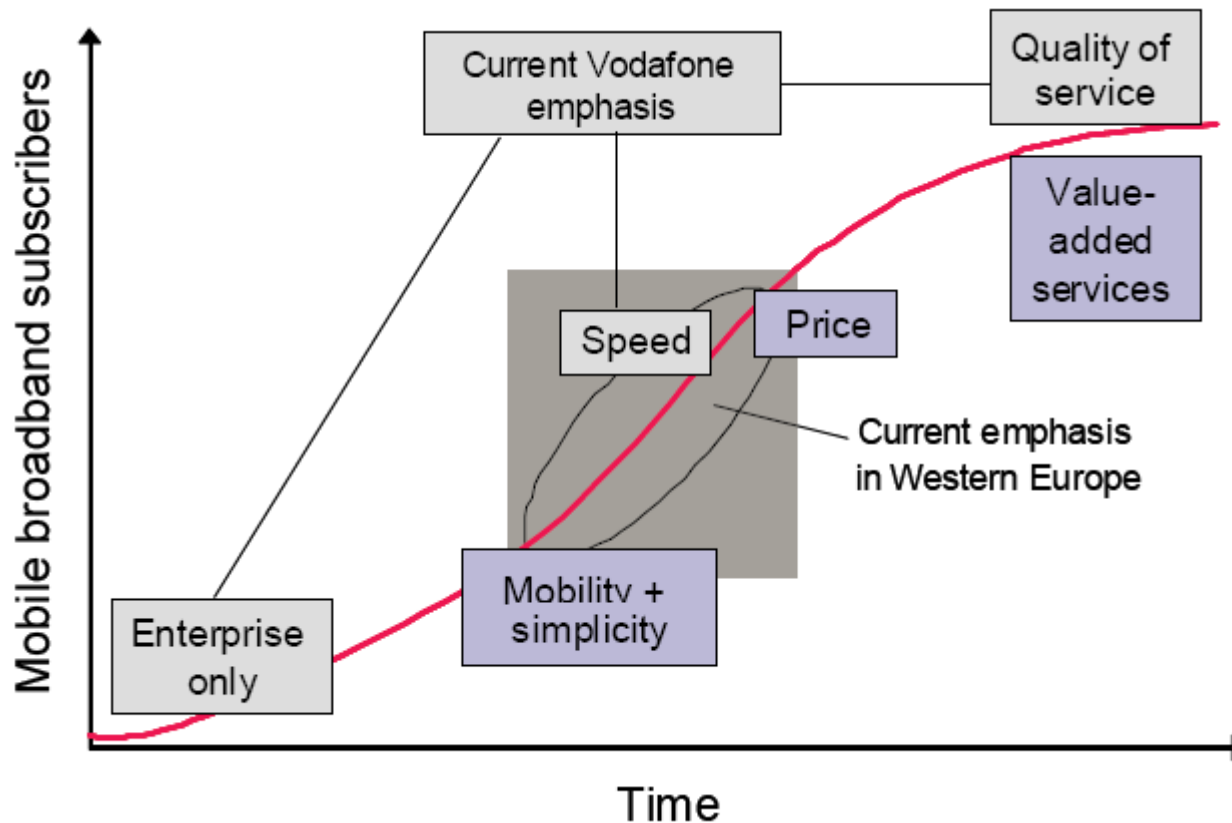
The Market for Mobile Media

- Mobile broadcasting introduces new markets, products and services for broadcasters, content producers, equipment makers and - of course - consumers.
- Mobile TV could potentially be a market of up to **€ 20 bn by 2011**, reaching **500 million customers worldwide**.
- Increasing the consumption of TV, means :
 - advertising revenues;
 - increase ARPU (mobile);
 - increase revenues for content creators and
 - the s/w and h/w industries will bring new products on the market.



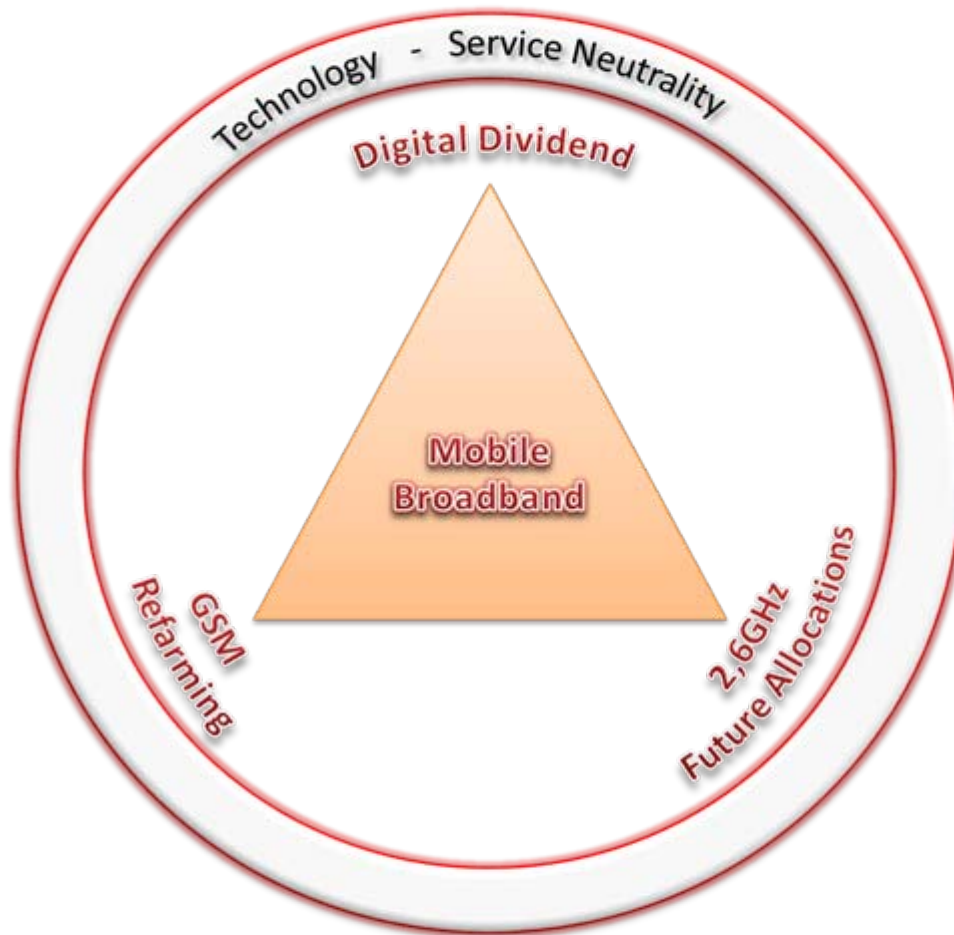
Vodafone Europe Mobile Broadband Marketing Message

Network Reliability & Speed, aimed at Consumers & Enterprises

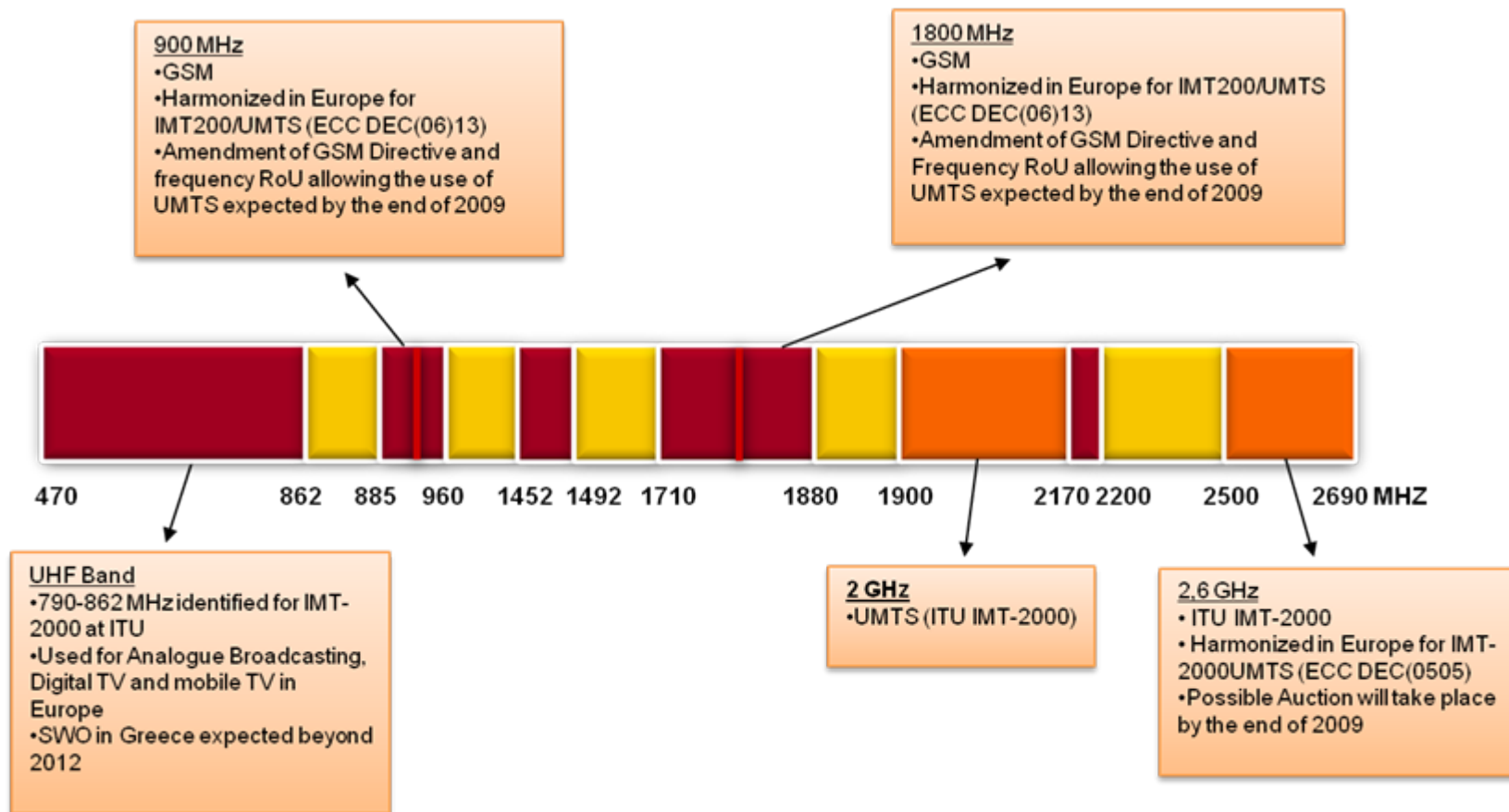


Mobile Broadband and Radio Spectrum

How New & Reformed Spectrum promotes Mobile Broadband Services



Spectrum Overview



Mobile Broadband (Mobile TV)

European Committee Key Factors :

- Light touch regulatory approach
 - Favouring investment, innovation and competition
- Common Standard
 - Reducing market fragmentation caused by multiple technical options for mobile TV transmission
- Radio spectrum
 - The SWO from analogue to digital TV, will release tremendous spectrum resources (Digital Dividend/DD) for wireless broadband
 - Amendment of GSM directive
 - The DD boosts wireless internet broadband services, supporting the EU's "broadband for all" policy, especially in these times of economic downturn
 - The incremental value of using the DD spectrum for wireless broadband across the EU is estimated to be between €150 – €200 bn



The Mobile Telecom sector as a Key Player for the economic progress and the development of Europe

Intervention at an Institutional & Structural Level

- Identify the regulatory challenges and market opportunities regarding the development of wireless broadband services considering
 - market definition,
 - market analysis, and
 - specific regulatory obligations
- Formulate a coherent regulatory framework that will promote “Mobile Broadband Access to All” as a key driver to closing the broadband gap
- Collective effort among “All Stakeholders” to develop policies that support investments in Networks of tomorrow

