

# Message of the President

By the end of 2007, the Greek broadband market was growing rapidly. Its rate of increase exceeded 100%, making our country's broadband market the fastest developing market worldwide.

However, to some extent, this rapid increase took the market operators, both the alternative ones and OTE, by surprise since they were not prepared to serve a demand that was constantly growing. Consequently, customer care, technical support, and, broadly speaking, the quality of the provided services were below standard, causing consumers much dissatisfaction and resulting in a large number of formal complaints. EETT, as the regulatory authority, was the recipient of the complaints lodged over problems and the dissatisfaction expressed by consumers who wished to be able to enjoy the benefits deriving from high speed rates and better Internet access. Thus, having acknowledged this problem and desiring, on the one hand, to prevent the situation from further exacerbating and, on the other, to ensure the provision of quality services to its consumers, EETT proceeded to take a series of related initiatives within its competence. It also flagged 2008 as «Year of Quality Broadband» aspiring at emphasizing the urgency in establishing quality broadband and the need to fully commit to this issue in order to benefit consumers.

The «Year of Quality Broadband» was served by EETT via a series of actions which either completed within 2008 or are still in progress and are expected to reach completion within 2009. Indicatively, albeit not restrictively, we mention the publication of the quality indicators; the issue of the Code of Practice for the provision of Electronic Communications services; the establishment of a Special Consumer Service Sector for Telecommunication services; and the issue of a guidebook containing information useful to consumers.

Nevertheless, we should point out that quality broadband is an ongoing goal whose achievement is not feasible within the course of just one year. The issue of having constant quality in the Electronic Communications services has become a permanent priority with the Regulatory Authority. By means of substantial interventions, strict monitoring of the market, and many information actions as well, EETT aspires in allowing consumers to choose, on the one hand, from a wide range of operators and innovative services at affordable prices via the growth of competition and, on the other, quality Electronic Communications services accompanied by a high level customer care.

Apart from the interventions implemented in the framework of the Year of Quality Broadband, EETT implemented further actions during 2008 in order to protect and safeguard consumer interests. More specifically, as of January 1, 2009, EETT decided to reduce mobile termination rates at a gradual pace with the reduction reaching 52% in the two-year period following that date; published the Code of Practice for the Multimedia Information Services; and amended the Carrier Pre-Selection Regulation clarifying important issues aiming at facilitating consumers. Last, within the framework of its publishing activity, it published information leaflets for the consumers and upgraded its website so that it may better serve its website visitors.

In 2008, the Broadband market continued on its course of growth which was mainly based on Local Loop Unbundling (LLU). Broadband growth for that year was marked by the increase in the broadband penetration rate to the population by 4.3 units, going from 9.1% to 13.4%. The LLU lines recorded a new increase exceeding 646,000 at the end of 2008 while the number of broadband connections at the end of December reached 1,506,614. Among the EETT actions that contributed to the increasing growth of the course of Broadband were the amendment of the Reference Unbundling Offer (RUO), the issue of the Collocation Regulation, and the implementation of a variety of information actions.

More specifically and with regard to its regulatory role, in 2008, EETT initiated the second round of market analysis and definition based on the new European Commission recommendation. At the same time, it proceeded with the issue pertinent to the regulations concerning Wholesale Line Rental (WLR) and Leased Lines. It also specified and regulated the implementation issues involved in the accounting separation obligation imposed on OTE for the individually defined Electronic Communications markets. Furthermore, with a view to promoting and safeguarding network and services competition, proceeded with the investigation into OTE's bundled packages; formal complaints regarding issues of LLU, Carrier Pre-Selection, and Number Portability; and imposed fines and other sanctions where applicable.

In the radiofrequency sector, in 2008, EETT focused on integrating the new responsibilities of operation in compliance with the new regulation framework governing digital television and the smooth transition into digital television broadcasting. Having been authorized under Law

3548/2007 to grant rights of use, mainly to television stations of national coverage, EETT issued a regulative provision for the procedure to be followed in the submission and examination of relevant requests. Furthermore, according to the provisions set by Law 3592/2006, EETT placed under Public Consultation a Regulation draft for the installation of equipment within antenna parks defined as such by the Joint Ministerial Decisions stipulated by Law. In the framework of its increased competences, EETT has proceeded to the regulation of issues arising during transmissions of radio-television stations and relating to the legality of those transmissions, the violation of technical characteristics, and mutual interferences as well as to the further imposition of administrative sanctions.

In the same sector, EETT implemented actions targeting the lifting of restrictions governing spectrum use and the development of broadband mobile services in our country while it persevered with exercising stringently its established responsibilities in spectrum licensing, monitoring, and management. Among its most important actions were the proposal submitted to the Ministry of Transport and Communications for a large number of modifications in the National Frequency Allocation Tables (NFAT) and the conduct of a Public Consultation regarding the lifting of technological restrictions in the rights of use for mobile telephony operating in the 900 and 1800 MHz zone.

In the Postal Services sector, the most important actions of EETT for 2008 were the conduct of a Public Consultation aiming at revising the Regulations of General Authorization/ Individual Licences as well as the issue of the Regulation for General Authorization. For the first time, the new Regulation determined the terms and the requirements governing the provision of Postal Services and relating to the protection of users; simplified the licensing procedures for the postal enterprises; and strengthened their operation flexibility. Furthermore, EETT's Postal Directorate conducted an annual Study for the registration of the quantitative and qualitative characteristics of the postal market which concluded that the growth rate of the liberated sector is double the respective growth rate of the Universal Service.

Last, in 2008, EETT's Postal Directorate intensified its regulatory activity aiming, on the one hand, at the smooth operation of the postal market within a competitive environment and, on the other, at the improvement of the services provided to consumers. In this context, a series of scheduled and

unscheduled audits were programmed and carried out. Those audits focused on registered and unregistered providers with EETT's Postal Registry aiming at ascertaining the soundness of their operation and at potentially taking certain measures towards their compliance with the Legislative Framework.

In 2008, EETT formulated for the first time five (5), key, strategic goals demanding action in the Electronic Communications and regarding the 2008-2011 period:

- 1) Encouragement of competition at the Service level.
- 2) Development of full competition at the Infrastructures level.
- 3) Improvement of spectrum availability and support of the creation of advanced infrastructure in wireless networks.
- 4) Making innovative services fully available to consumers.
- 5) Fully serving the benefits of consumers in terms of quality of service, availability of services, and information transparency.

However, taking into consideration the new responsibilities of EETT regarding radio-television issues as well as the new conditions that are taking shape within the Electronic Communications environment, we ought to add to the aforementioned key, strategic goals another one which is also extremely and equally important:

- 6) The formation of the appropriate regulatory framework for the promotion of the convergence between telecommunications, the Press, and the Media and its contribution to the transition to Digital Television.

With the initiated convergence of Electronic Communications with the electronic Press and Media, we nominated 2009 as the «Year of Broadband Convergence of Telecommunications with the Press and Media» while, at the same time, we have been scheduling the implementation of respective actions. In its capacity as the regulatory arm and the basic technical consultant of the State on issues regarding radiofrequencies, EETT is in possession of the relevant experience and statutory armoring to contribute actively to the effort of a methodical and efficient transition into the digital era.

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