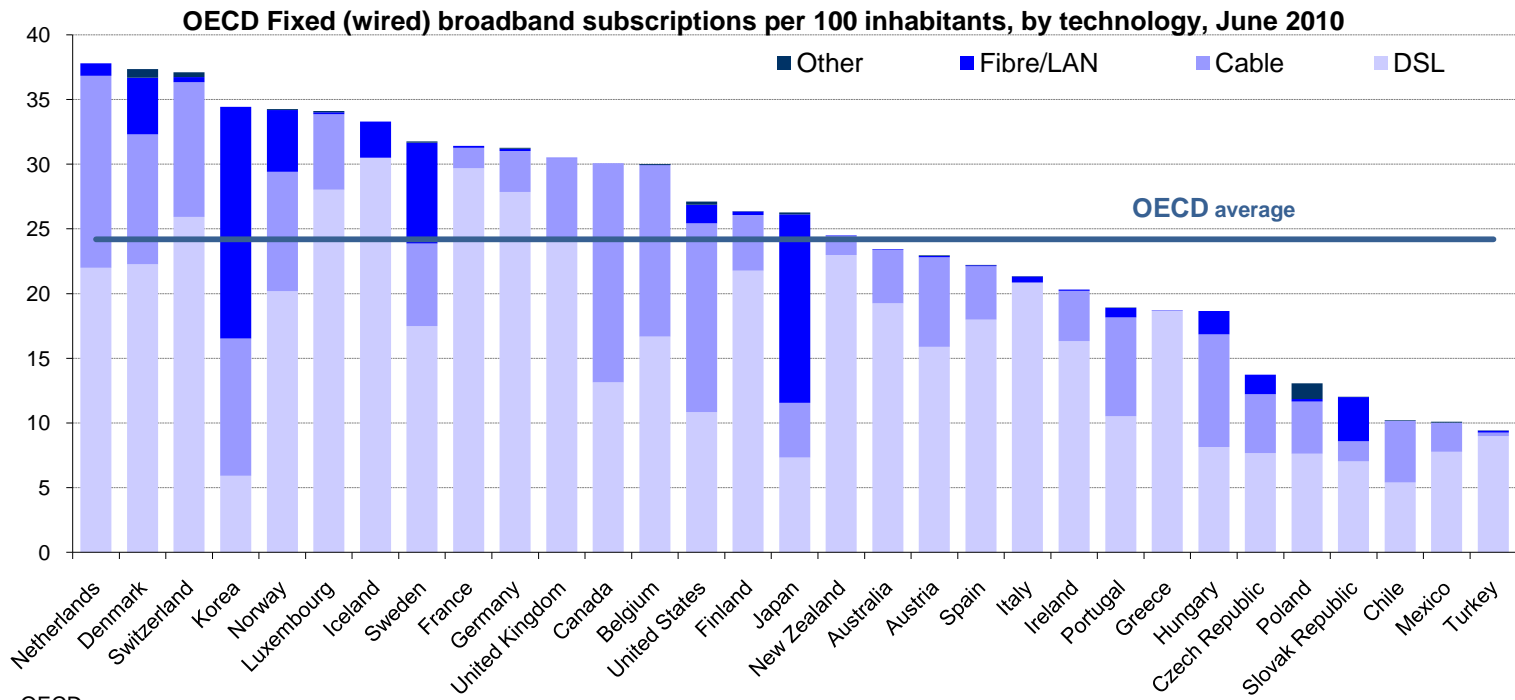


BEREC and the future of regulation

3 June 2011





























Chris Fonteijn, BEREC-Chair 2011

Broadband penetration in the OECD



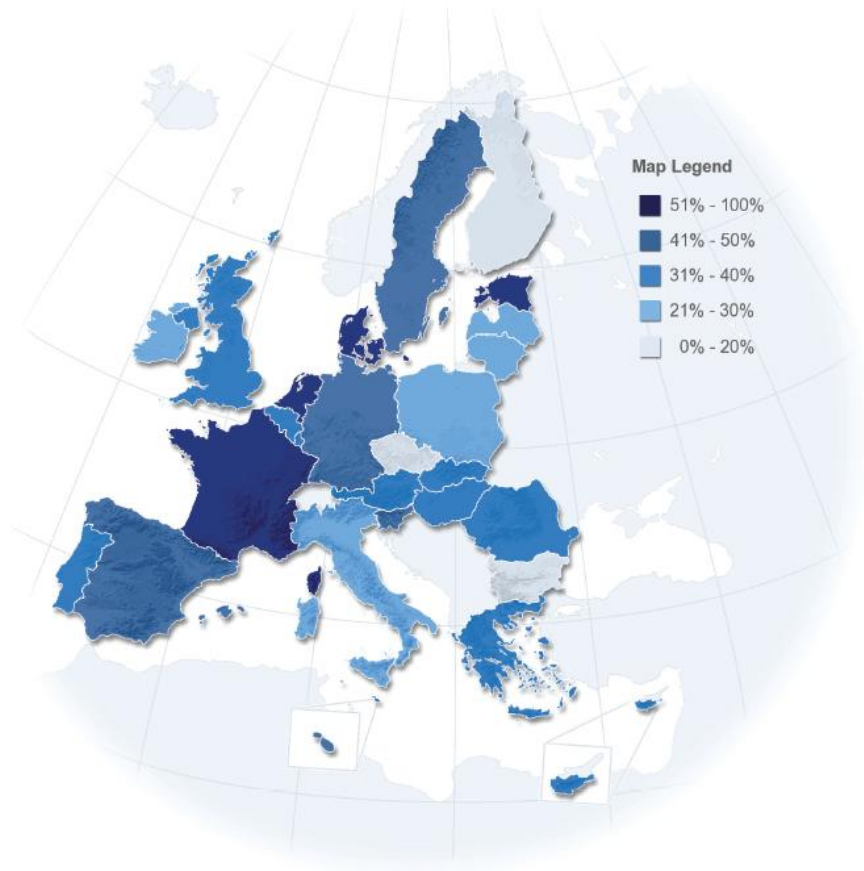
Source: OECD

Uptake of bundles in the EU

 NL	60%
 DK	53%
 EE	52%
 FR	51%
 MT	47%
 SI	46%
 SE	43%
 ES	42%
 DE	41%
 LU	40%
 UK	40%
 BE	39%
 EU27	38%
 AT	37%
 HU	36%
 RO	36%
 PT	34%
 CY	34%
 EL	34%
 SK	31%
 IE	27%
 PL	25%
 LT	25%
 LV	24%
 IT	21%
 CZ	19%
 BG	18%
 FI	13%

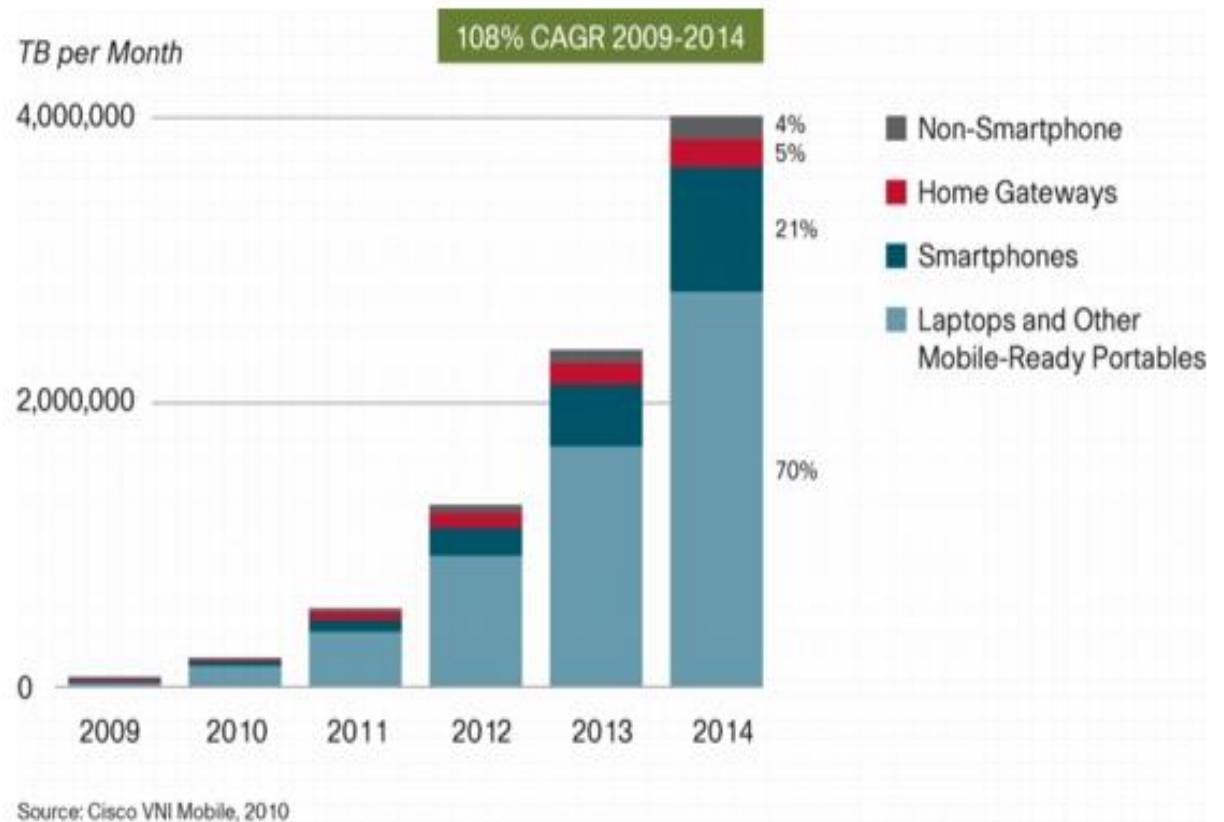
Question: QA24. By bundle, we mean a combined package offering more than one communication service from the same provider at a single price. Does your household buy two or more of the following services as part of a bundle?

Answers: **Total Yes**



Growth of mobile broadband

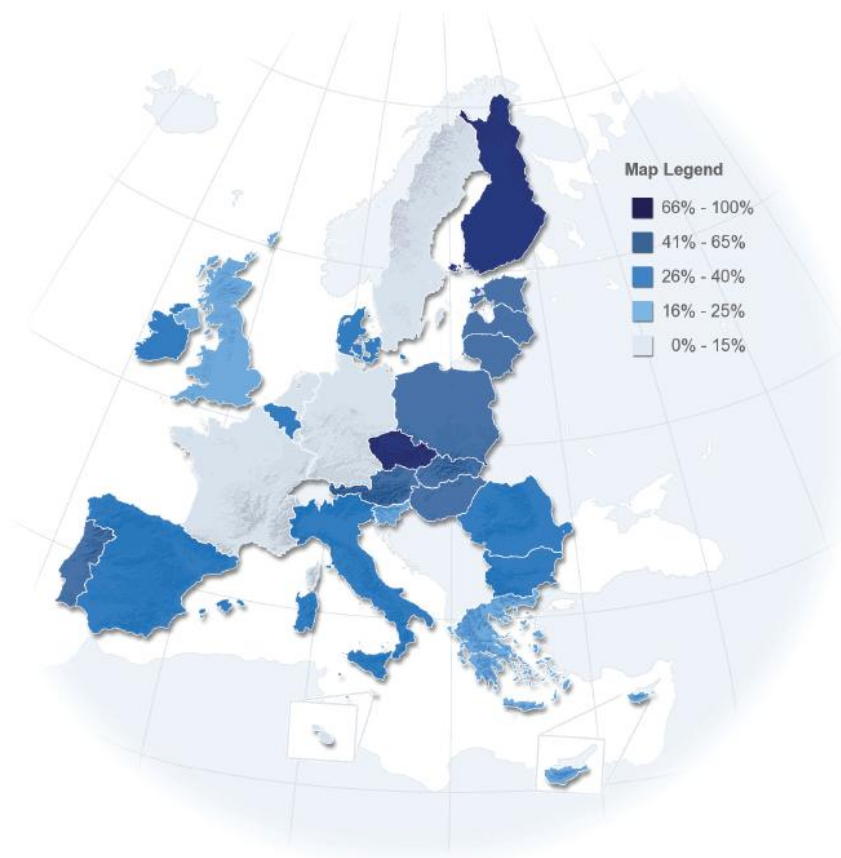
Figure 3. Laptops and Smartphones Drive Traffic Growth



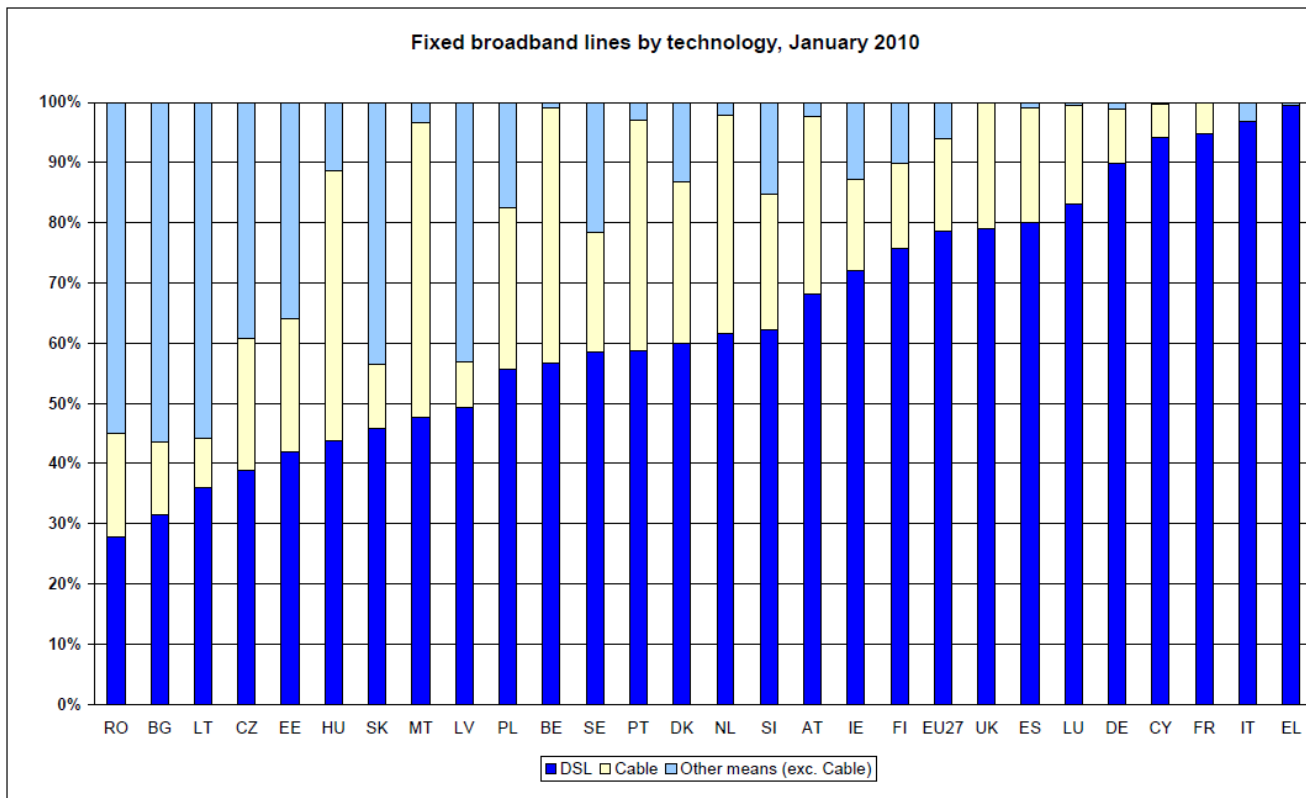
Mobile only households in the EU

Households having mobile telephone access but no fixed telephone access

CZ	73%
FI	71%
SK	59%
LT	52%
LV	51%
EE	45%
AT	45%
PL	44%
HU	44%
PT	41%
RO	39%
BE	35%
DK	32%
IT	32%
BG	30%
ES	29%
IE	28%
EU27	25%
UK	20%
EL	19%
SI	18%
CY	16%
DE	11%
FR	11%
NL	11%
LU	9%
MT	5%
SE	1%

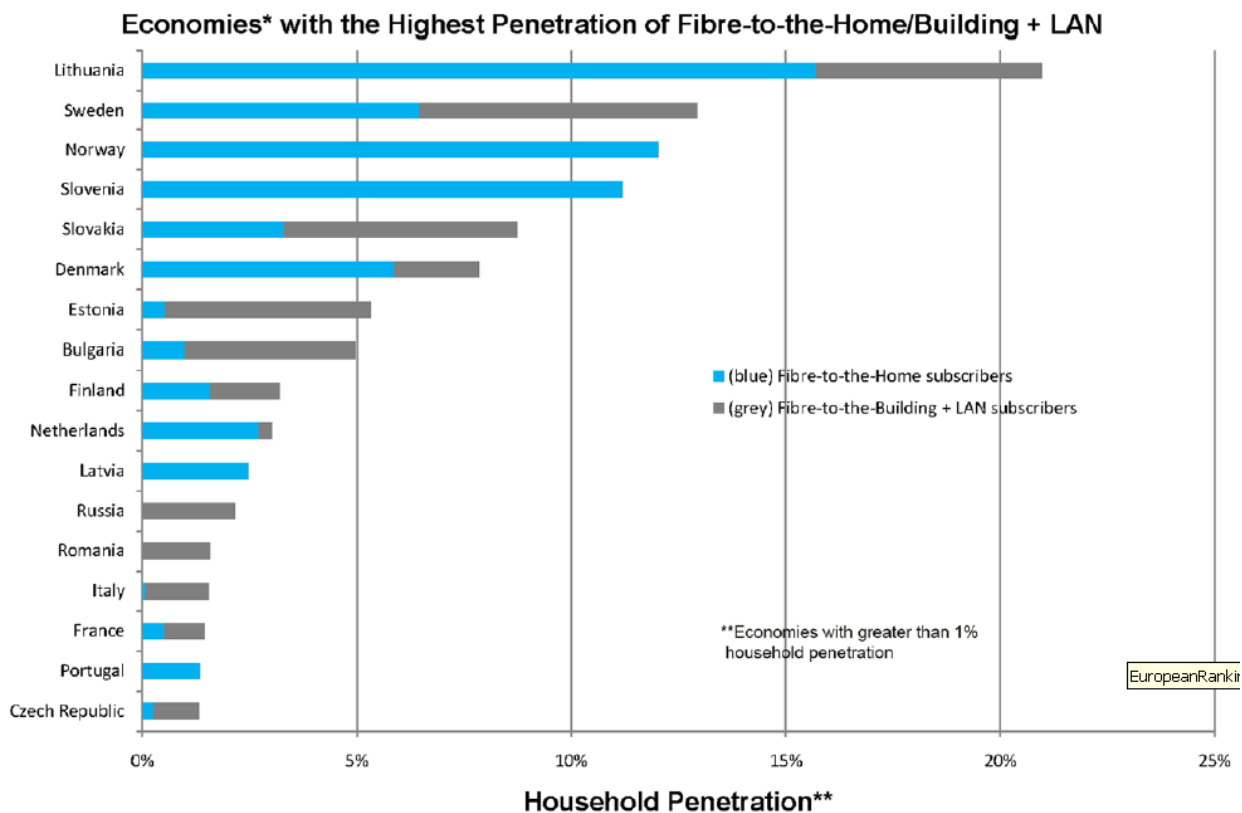


Competing Infrastructures



Source: 15th Implementation Report

Fibre roll out in the EU



Source: IDATE and FTTH Council Europe, October 2010

Challenges for the future

- Fostering infrastructure competition in an NGA world
 - Deregulation and transition towards general competition law?
 - Preventing re-monopolisation where necessary
 - Integrating competition in frequency policies
- Facilitating investment in next generation networks
 - Promoting both competition and NGA-investment
 - Aligning regulation and state aid policy
- The open internet
- Increasing harmonization and cooperation