Body of European Regulators
for Electronic Communications

BEREC

The future of regulation

Challenges for the next decade

28 January 2011

Chris Fonteijn, BEREC-Chair 2011

About BEREC

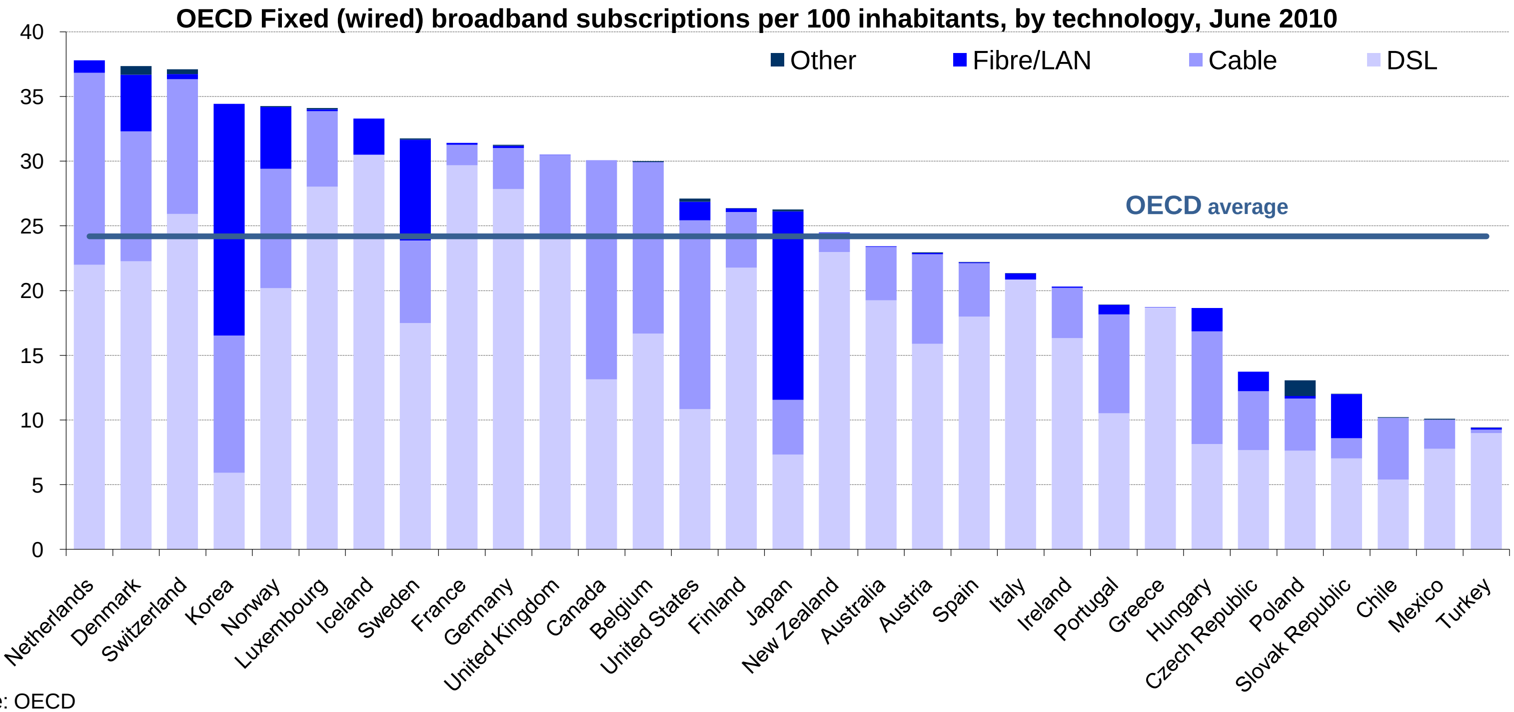
- Official European communications body

- Advises European Commission, European Parliament and Council

- Board of Regulators: 27 Heads of NRA’s

- Office of BEREC in Riga
  - Administrative Manager, Mr Ando Rehemaa

Broadband penetration in the OECD



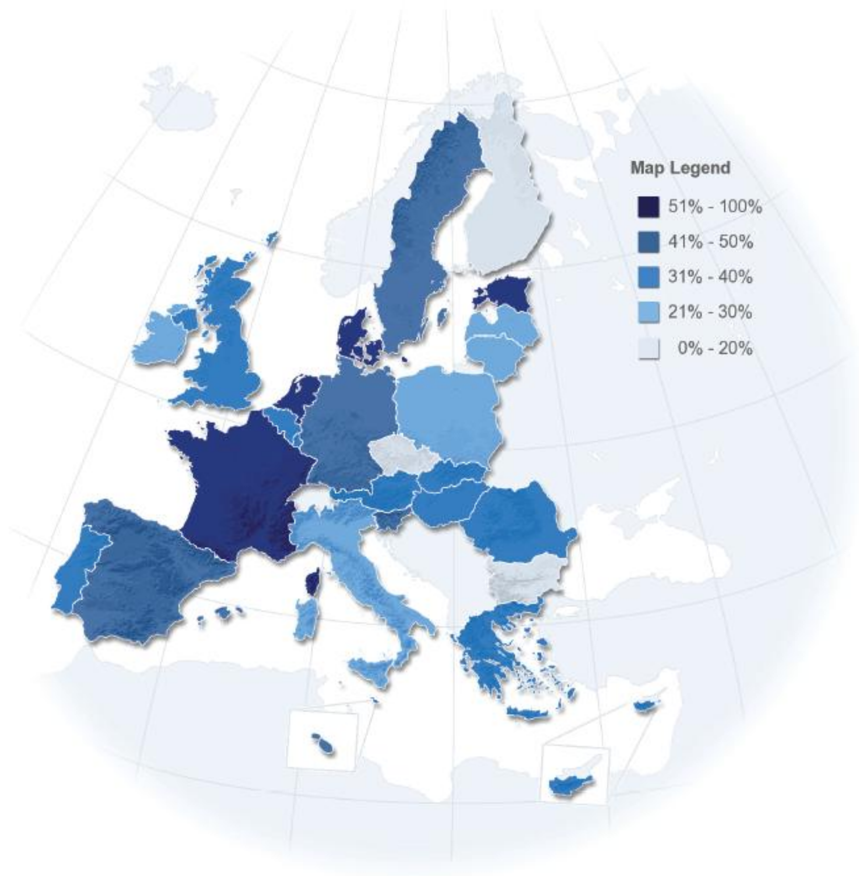
Source: OECD

Uptake of bundles in the EU

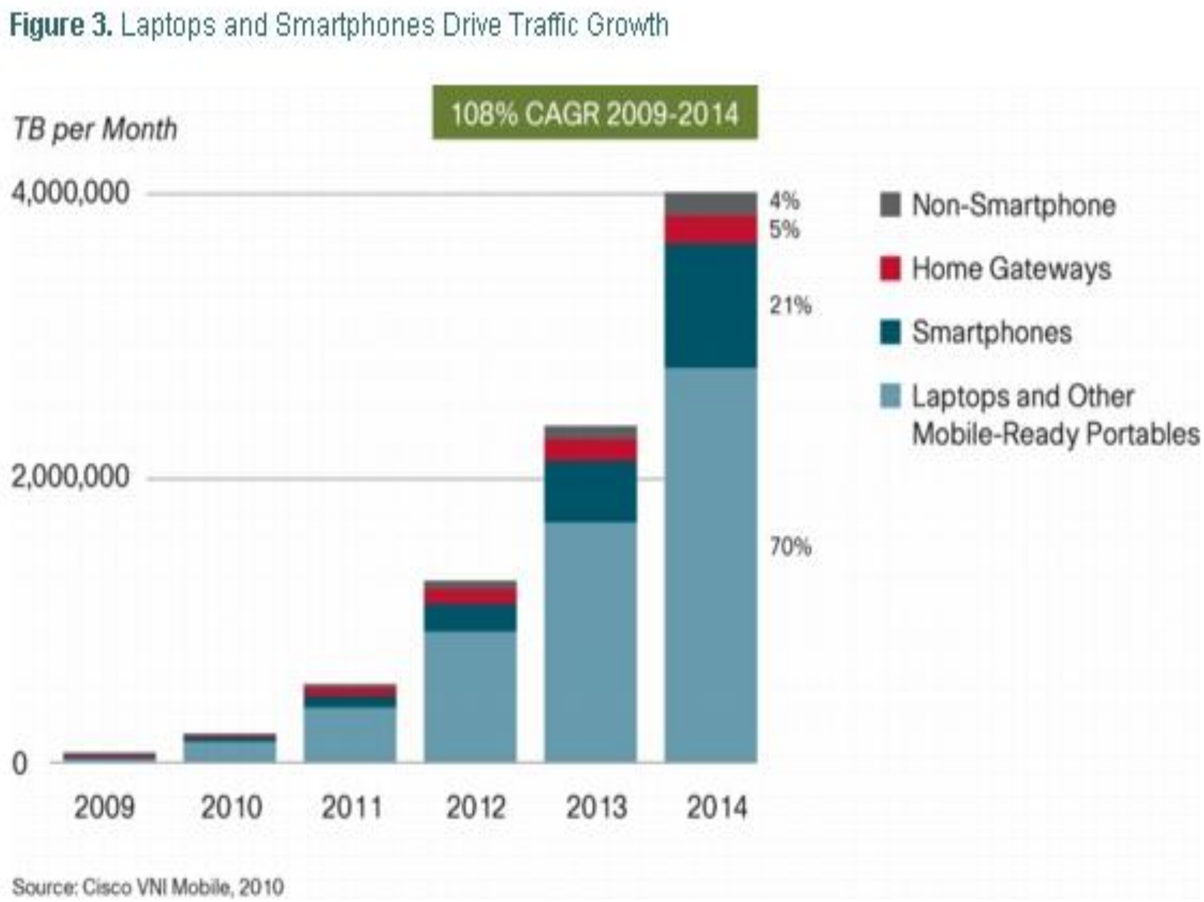
NL	60%
DK	53%
EE	52%
FR	51%
MT	47%
SI	46%
SE	43%
ES	42%
DE	41%
LU	40%
UK	40%
BE	39%
EU27	38%
AT	37%
HU	36%
RO	36%
PT	34%
CY	34%
EL	34%
SK	31%
IE	27%
PL	25%
LT	25%
LV	24%
IT	21%
CZ	19%
BG	18%
FI	13%

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?

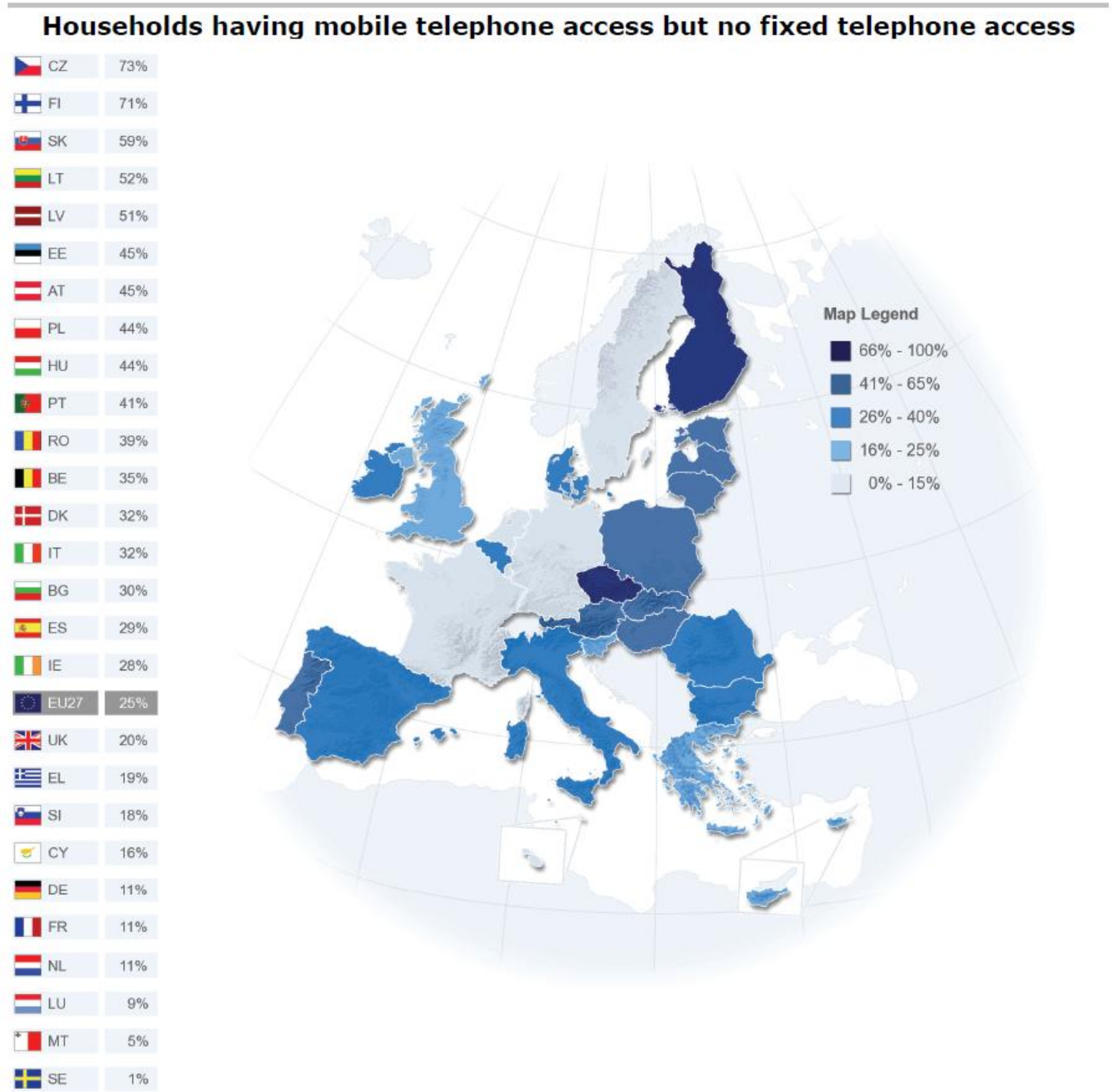
Answers: **Total Yes**



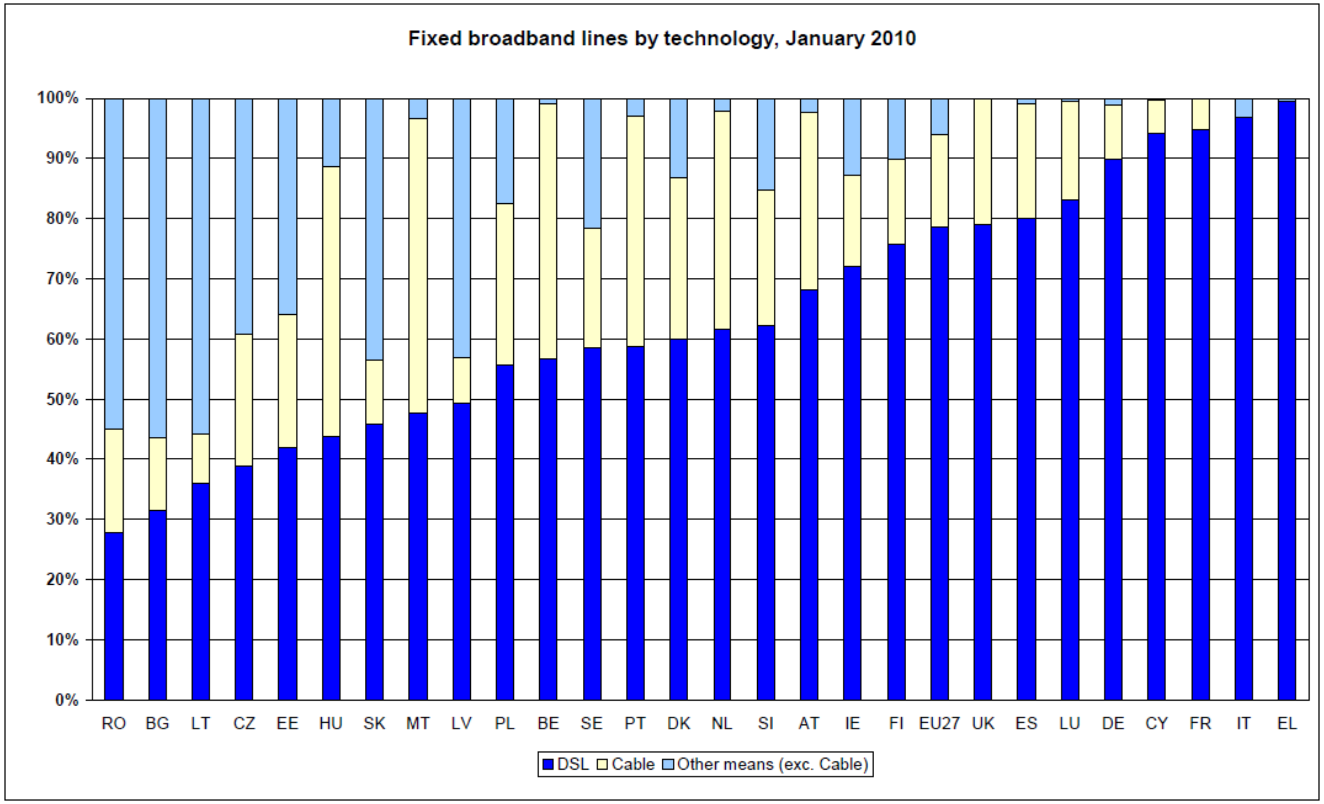
Growth of mobile broadband



Mobile only households in the EU

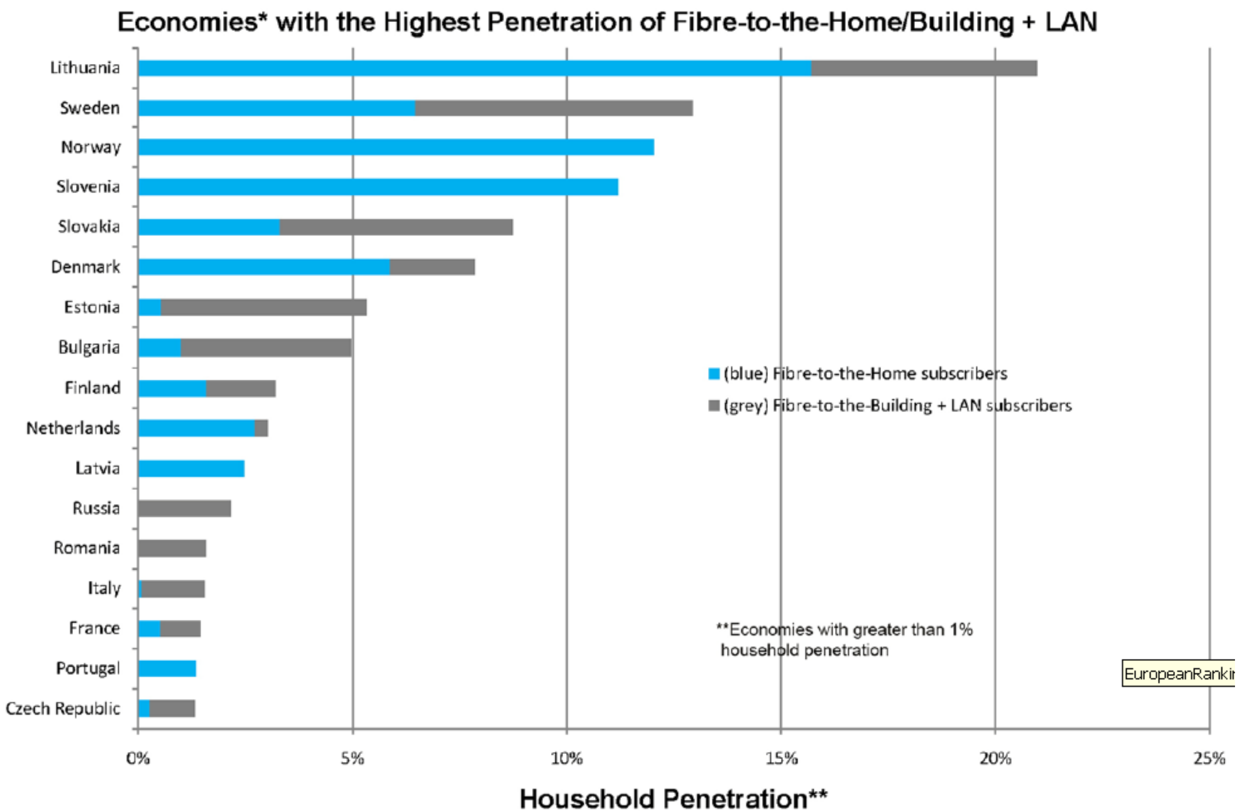


Competing Infrastructures



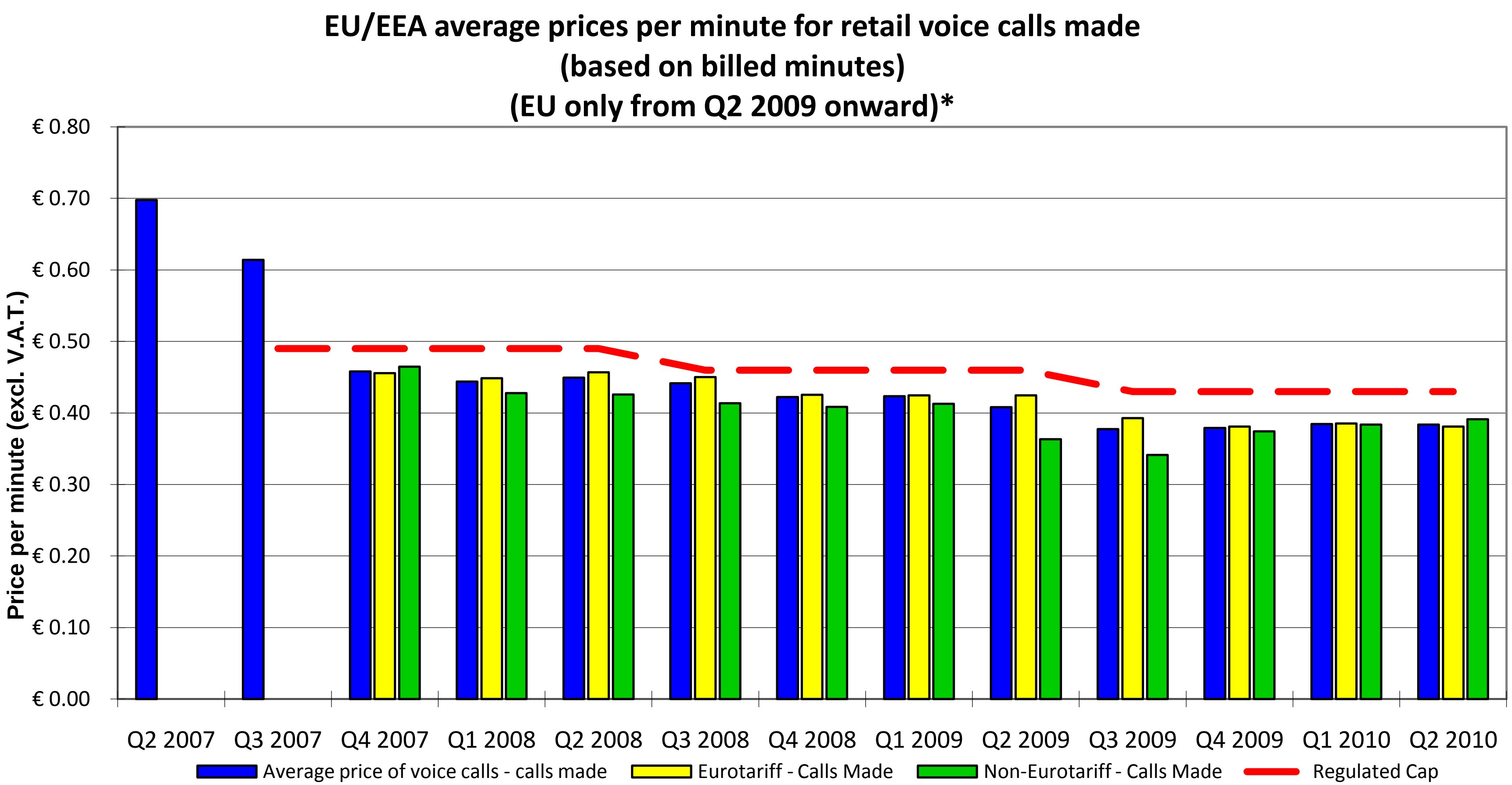
Source: 15th Implementation Report

Fibre roll out in the EU



Source: IDATE and FTTH Council Europe, October 2010

Development of roaming prices



Source: BEREC

BEREC

Challenges for the next decade

- Fostering infrastructure competition in an NGA world
  - Deregulation where possible
  - Preventing re-monopolisation where necessary
  - Integrating competition in frequency policies
- Facilitating investment in next generation networks
  - Facilitation in regulatory policy
  - Aligning regulation and state aid policy
- The open internet
- Increasing harmonization and cooperation
  - Continued oversight of mobile roaming
  - Sustainable solution termination bottlenecks